R-24 - Full Merged Application

SUNY Charter Schools Institute
Request for Proposal: 2025
Lead Applicant: Courtney Murphy

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**Note: Request 24 is this fully merged document.*

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SUNY Charter Schools Institute
The State University of New York

2025 TRANSMITTAL AND SUMMARY FORM

Please refer to the 2025 SUNY Request for Proposals document available at https://www.newyorkcharters.org/resource-center/applicants/ when completing this form. Contact charter.newapp@suny.edu with any questions.

Proposed School Information (note: if proposing multiple schools, a separate Transmittal is required for each one)			
Proposed Charter School Name: (Must include words "Charter" and "School")	Wildflower Upstate New York Charter School		
Education Corporation Name (if different than proposed charter school name):	Wildflower Upstate New York Charter School		
		Ed. Corp Status:	New Ed Corp
Proposed Opening Date (Month/Year):	09/2026	School District of Location (or NYC CSD):	Ballston Spa CSD

Proposed Grades to be Served and Enrollment		
Charter Year	**Grades**	**Enrollment**
Year 1	k-1	16*
Year 2	k-2	24*
Year 3	k-3	32*
Year 4	k-5	43*
Year 5	k-6	59*

Proposed Affiliations (if applicable)	
Charter Management Organization ("CMO"):	
CMO Contact Info (Name, Phone):	
Partner Organization:	Wildflower Schools Foundation
Partner Contact Info (Name, Phone):	Erin Quigley [redacted]

NOTE: A CMO provides a majority of educational management services at a school, a partner organization is a non-profit entity that provides space or support to the school but is does not provide a majority of educational management services.

Lead Applicant(s) Contact Information						
Lead Applicant Name:	Courtney Murphy					
Applicant is a (check all that apply):	☑ Parent	☐ Teacher	☐ School Administrator	☑ District Resident	☐ SUNY Ed Corp/Charter School	
Organization Name (if applicable):						
Applicant Mailing Address:	[redacted]					
Phone Number (direct line):	[redacted]	Secondary Phone Number:		Email Address:		

Secondary Applicant Name (if applicable):					
Applicant is a (check all that apply):	☐ Parent	☐ Teacher	☐ School Administrator	☐ District Resident	☐ SUNY Ed Corp/Charter School
Organization Name (if applicable):					
Applicant Mailing Address:					
Phone Number (direct line):		Secondary Phone Number:		Email Address:	

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Media/ Public Contact Information (Note: this information will be publicly posted on the Institute's website)					
Name:	Erin Quigley	Phone #:	(973)600-7051	Email:	erin.quigley@wildflowerschools.org

Program Design

Provide the proposed school's mission statement in the space below. **(Maximum 200 words.)**

Our mission at Wildflower Upstate New York Charter School is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where every child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that every student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Provide the proposed school's key design elements. Provide a brief **(up to 50 words)** description of each key design element.

1) Authentic Montessori philosophy: Rooted in Dr. Maria Montessori's 100-year-old philosophy, our approach moves beyond one-size-fits-all education. Teacher Leaders honor each child's unique journey, allowing self-paced learning. Multi-age classrooms, individualized instruction, and hands-on learning create an inclusive environment where all students, including those with disabilities, receive personalized support, fostering success, cognitive growth, and motivation.

2) Mixed age classrooms*: Authentic Montessori classrooms offer mixed age groupings which provide stability by allowing students to stay with the same teacher for three years, fostering trust, confidence, and individualized support. This structure strengthens relationships, deepens teachers' understanding of each child's needs, and enhances academic and social-emotional growth. This particularly benefits students with diverse learning profiles who thrive with continuity. *If approved for this charter, we would develop a separate 501(c)(3) dedicated solely to pre-k aged 3 and 4. We would partner with BSCSD to offer UPK to our 4 year old's families, and charge tuition for our 3 year old families. This will allow us to provide a mixed age setting in line with authentic Montessori. Our narrative response in our RFP regarding enrollment (R-05ac - Enrollment) reflects our belief in the micro-school model and reasoning for these numbers staying intentionally small (keeping in mind that overall class sizes will be slightly larger with the addition of pre-k students).

3) Individualized attention: Montessori teachers are trained observers who tailor instruction for all students, ensuring each child follows an individualized learning plan at their own pace. Multi-age classrooms foster collaboration, mentorship, and self-paced growth, reinforcing both academic and social development. This inclusive model nurtures confidence and belonging, allowing every child to thrive while progressing at their own pace.

4) Inclusive education: Prioritizing students with disabilities in enrollment. The American Montessori Society emphasizes that authentic Montessori education fosters an inclusive environment where all children, including those with disabilities, thrive. Prioritizing individualized learning and hands-on experiences, Montessori classrooms support diverse needs. Our commitment to inclusion ensures students with disabilities have equitable access to high-quality education with an innovative curriculum.

5) Co-taught classrooms: Our co-teaching model pairs an early childhood special education teacher with a Montessori-certified teacher, ensuring all students receive the support they need. This collaboration fosters an inclusive, respectful classroom culture. Since teachers loop with students across three years, relationships strengthen, improving achievement and giving every child the opportunity to thrive.

6) Focus on equity and inclusion through all aspects of school design: We partner with families to foster a welcoming, inclusive community where all students feel they belong. Each child is seen, known, and safe. We nurture both academic, social-emotional, and mental well being and growth. We ensure every child, inlcuding those with disabilities, receives individualized support to thrive and access the resources they need to succeed.

7) Wildflower Schools 9 principles: Wildflower schools follow authentic Montessori principles, fostering peaceful, child-centered environments with hands-on learning, self-direction, and collaboration. Rooted in equity, innovation, and nature, they connect school, home, and community while supporting diverse learners. Each school operates independently yet shares resources, ensuring accessible, high-quality education enriched by creativity and inclusion.

Provide a brief overview of the proposed school's academic program in the space below. The description should address any specific philosophical, instructional, curricular, or other approaches the school intends to implement and the rationale for this selection. **(Maximum 500 words.)**

Wildflower Schools are authentic Montessori schools, led by teacher leaders who are Montessori credentialed and utilize genuine Montessori materials and curriculum. At Wildflower Upstate New York Charter School, we recognize the research-backed evidence that Montessori education is inherently inclusive, allowing students to learn at their own pace with individualized support. Rooted in scientific observation, our approach tailors learning experiences to each child's unique interests and developmental needs, ensuring that all students receive the guidance and resources necessary to thrive. It was with the mission of inclusivity in mind, specifically for students with disabilities, that we chose this innovative curriculum for our school. Additionally, aside from New York City, there are currently no tuition-free public authentic Montessori charter schools anywhere else in New York state. Our proposed school is a groundbreaking opportunity for families in our region. Our commitment to inclusivity extends beyond serving students with disabilities, it also ensures access to Montessori for the nearly 36% of economically disadvantaged students in our community whose families would greatly benefit from additional high-quality school options. By offering a tuition-free, authentic Montessori education, we aim to remove financial barriers and expand educational equity for all families.

Developed by Dr. Maria Montessori, the Montessori Method is grounded in scientific observation of children's learning processes. Maria Montessori developed her method over 100 years ago through observations and research in schools serving high-poverty communities and children with special needs. The approach fosters independence, social responsibility, and intellectual curiosity through structured yet self-directed learning environments. Montessori classrooms include multi-age groupings where students learn from one another, and lessons are tailored to sensitive developmental periods to optimize learning. The prepared environment includes hands-on, self-correcting materials that promote deeper conceptual understanding prior to introducing abstract ideas. The Montessori Method is in perfect alignment with our mission and vision for our future students because of its evidence-based outcomes, holistic, child-centered approach, and underlying philosophy focused on serving all children.

At Wildflower Upstate New York Charter School we are unapologetically creating an inclusive learning environment where all students receive the resources and support they need to thrive. Our Teacher Leaders will partner with families to co-design our school with a focus on inclusion and belonging-ensuring every child is valued and empowered in their learning journey. We chose Montessori curriculum because extensive research demonstrates that when implemented with integrity, the Montessori method is one of the few educational approaches that provides long-term academic and social benefits for all children. Research has also shown that Montessori benefits children from low-income communities and under-represented backgrounds in terms of academic achievement, executive function, creativity, social skills, work habits, attendance, and behavior. Students in Montessori schools outperform students in traditional schools on measures of literacy and numeracy as well. Our choice of an authentic Montessori model is rooted in its proven ability to foster independence, inclusion, and academic success for all children, particularly those with disabilities and from diverse backgrounds, ensuring that every student receives the individualized support needed to thrive in a nurturing, child-centered environment.

Proposed Board Members

Provide a list of all proposed board members below. The Institute understands that applicants may add trustees to the education corporation's board in the future but expects applicants to have at least five board members at the time of application submission and identify a Chair, Vice-Chair, Secretary, and Treasurer. All proposed board members must undergo background checks and be present at an interview to constitute a functioning board in order for the Institute to recommend the charter for approval.

For each proposed trustee please provide a brief biographical statement **(maximum of 200 words each)** that includes each proposed trustee's:

- Name;
- Proposed charter school board title, if applicable (e.g., Chair, Vice-Chair);
- Current job title/position and company/organization;
- Past job title(s)/position(s) and company/organization (if applicable);
- Educational background including degree(s) earned and institution(s); and,
- Any relevant experience including boards, volunteering, community organizations, etc.

Julia Franklin (Chair): With over 16 years of experience in education, Julia has held various instructional and operations-based roles. Julia began her career in education as a Teach for America corps member, teaching at an elementary school and later KIPP DC: Promise Academy. She holds a bachelor's degree in Political Science from Iowa State University and a master's degree in Urban Education Policy from Brown University. Julia is currently the Executive Director of Nurses Middle College Capital Region. In her role, she oversees all academic, operational, and financial aspects of the school. Previous to that, she served as the Managing Director of Schools at KIPP Capital Region Public Schools, where she managed Principals and Directors of Operations at both a middle school and a high school. Julia also spent three years as the co-leader and Director of Operations at Troy Prep Elementary School in Troy, NY.

Leah Ferrone (Vice-Chair) is a Certified Mindfulness and Yoga Practitioner. Through her company Brave Lion, she offers neuroscience and nature-based mindfulness to help educators, children and families cultivate a personalized, accessible and simplified mindful map of tools for mental well-being. Leah was trained in mindfulness for children through: Dr. Christopher Willard of Harvard University (Growing Up Mindful I and II), Mindful Schools, MindUp and Flow and Grow Yoga for Children. She is a preschool teacher, and a 200 hour Certified Yoga Instructor. Leah received her Bachelor of Arts from the University of Massachusetts.

Ruhi White (Treasurer) brings a wealth of experience in financial management, data analysis, grants administration, and strategic planning. As the Lead Consultant/Owner of R. White Consultancy, LLC, she has provided expert guidance on optimizing operations and managing budgets. Her previous roles as a Data Analyst at Leidos and NYSUT, along with her tenure as Assistant Director of Special Projects at the New York State Department of Financial Services, highlight her ability to oversee financial systems and make data-driven decisions. Ruhi holds an MBA with a concentration in General Business Administration from Utica University and a BA in Political Science with a minor in Criminal Justice from the University at Albany, SUNY.

Jessica Connor (Secretary) has a diverse background in education, having served as both an educator and administrator in various pre k-8 settings. She began her career as a preschool teacher before advancing to leadership as Assistant Director at a preschool. Her later experience also includes teaching math and science to students in grades 6-7 and assisting with managing charter school operations as a Project Manager. Most recently, she worked as a Scholar Support Coordinator, providing academic/compliance related oversight for students with disabilities at a charter school. Jessica holds both a B.S. and M.S.Ed. in Birth-6 General Education and Special Education from SUNY Plattsburgh.

General board members: Asma Yasin, BA in Economics and Political/Legal Studies, MS in Education: SUNY New Paltz. Former ENL instructor recently turned stay at home mom. Stacey Hengsterman, BA from SUNY Cortland, current President and CEO of Special Olympics NY- formerly spent 2 decades shaping higher education policy as a top advisor to the chancellor, Board of Trustees, and 64 campus presidents at SUNY. Johanna Eldridge, Ph.D from Cornell, BS from Rensselaer Polytechnic Institute. Former research scientist turned stay at home mom. Parent in BSCSD, member of Ballston Spa Malta Ave PTA. Danisha Feliz, Bachlor of science in Human Development from Binghamtom University, MS in Childhood Education (1-6) from City College of New York, an experienced nonprofit leader, educator, and advocate with a strong background in program development, strategic planning, and community engagement.

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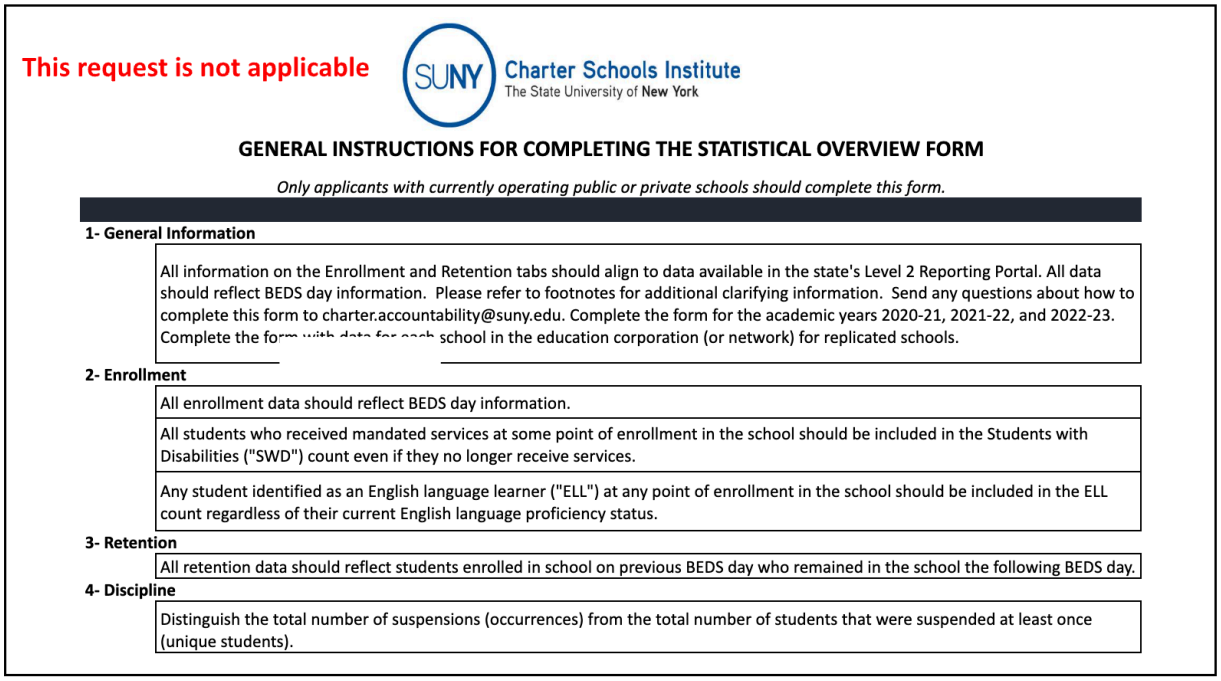
Lead Applicant Signature	
Signature:	[redacted]

By signing this Proposal Transmittal Form, the Lead Applicant certifies that the information contained in this proposal to establish a charter school pursuant to the New York Charter Schools Act with the State University of New York Board of Trustees is true and accurate to the best of his or her knowledge.

NOTE: The Institute only accepts valid digital signatures or physically signed scanned copies. Please do NOT submit typed signatures. Please contact the Institute directly if you have questions

R-00b - Statistical Overview

This request is not applicable.



This request is not applicable

SUNY Charter Schools Institute
The State University of New York

GENERAL INSTRUCTIONS FOR COMPLETING THE STATISTICAL OVERVIEW FORM

Only applicants with currently operating public or private schools should complete this form.

1- General Information

All information on the Enrollment and Retention tabs should align to data available in the state's Level 2 Reporting Portal. All data should reflect BEDS day information. Please refer to footnotes for additional clarifying information. Send any questions about how to complete this form to charter.accountability@suny.edu. Complete the form for the academic years 2020-21, 2021-22, and 2022-23. Complete the form with data for each school in the education corporation (or network) for replicated schools.

2- Enrollment

All enrollment data should reflect BEDS day information.

All students who received mandated services at some point of enrollment in the school should be included in the Students with Disabilities ("SWD") count even if they no longer receive services.

Any student identified as an English language learner ("ELL") at any point of enrollment in the school should be included in the ELL count regardless of their current English language proficiency status.

3- Retention

All retention data should reflect students enrolled in school on previous BEDS day who remained in the school the following BEDS day.

4- Discipline

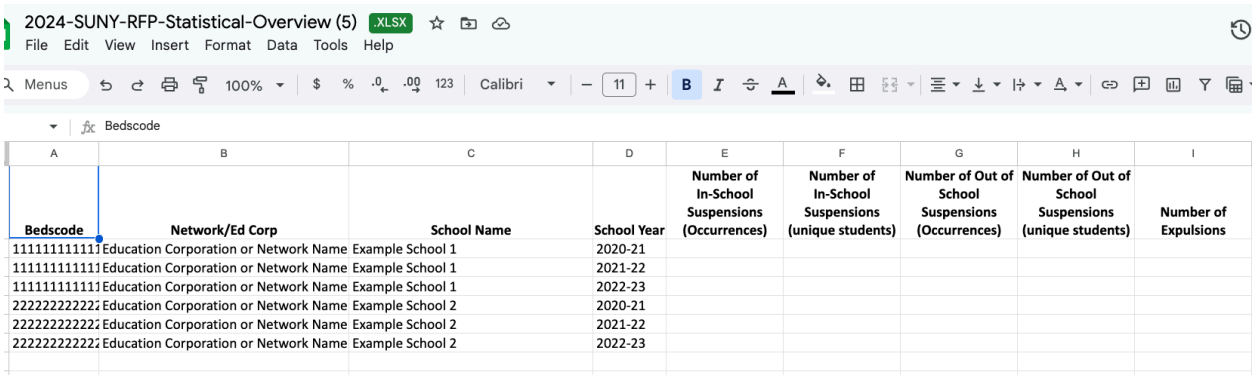
Distinguish the total number of suspensions (occurrences) from the total number of students that were suspended at least once (unique students).

A	B	C	D	E	F	G	H
Bedscode	**Network/Ed Corp**	**School Name**	**School Year**	**Total Enrollment[1]**	**Number of Students with Disabilities[2]**	**Number of English language learners[3]**	**Number of Economically Disadvantaged Students**
11111111111	Education Corporation or Network Nam	Example School 1	2020-21				
11111111111	Education Corporation or Network Nam	Example School 1	2021-22				
11111111111	Education Corporation or Network Nam	Example School 1	2022-23				
22222222222	Education Corporation or Network Nam	Example School 2	2020-21				
22222222222	Education Corporation or Network Nam	Example School 2	2021-22				
22222222222	Education Corporation or Network Nam	Example School 2	2022-23				
Notes:							
[1]All enrollment data should reflect *BEDS day information.*							
[2]All SWD numbers should include students who received mandated services at some point of enrollment in the school even if that student is no longer receiving services.							
[3]All ELL numbers should include current students receiving ELL services and any student ever identified as an ELL at the school.							

This request is not applicable.

Bedscode	Network/Ed Corp	School Name	School Year	Total Number of Students Eligible to Return from Previous Year[1]	Total Number of Eligible Students Who Returned from Previous Year	Number of Students with Disabilities Eligible to Return from Previous Year[2]	Number of Students with Disabilities Who Returned from Previous Year	Number of English language learners Eligible to Return from Previous Year[3]	Number of English language learners Who Returned from Previous Year	Number of Economically Disadvantaged Students Eligible to Return from Previous Year	Number of Economically Disadvantaged Students Who Returned from Previous Year
111111111111	Education Corporation or Network Name	Example School 1	2020-21								
111111111111	Education Corporation or Network Name	Example School 1	2021-22								
111111111111	Education Corporation or Network Name	Example School 1	2022-23								
222222222222	Education Corporation or Network Name	Example School 2	2020-21								
222222222222	Education Corporation or Network Name	Example School 2	2021-22								
222222222222	Education Corporation or Network Name	Example School 2	2022-23								

Notes:
All retention data should reflect students enrolled in school on previous BEDS day who remained in the school the following BEDS day.
[1]An eligible student is one who has not completed the school's terminal grade, aged out of the program or been expelled.
[2]All students who received mandated services at some point of enrollment in the school should be included in this count even if no longer receiving services.
[3]All ELL numbers should include current students receiving ELL services and any student ever identified as an ELL while at the school.



Bedscode	Network/Ed Corp	School Name	School Year	Number of In-School Suspensions (Occurrences)	Number of In-School Suspensions (unique students)	Number of Out of School Suspensions (Occurrences)	Number of Out of School Suspensions (unique students)	Number of Expulsions
111111111111	Education Corporation or Network Name	Example School 1	2020-21					
111111111111	Education Corporation or Network Name	Example School 1	2021-22					
111111111111	Education Corporation or Network Name	Example School 1	2022-23					
222222222222	Education Corporation or Network Name	Example School 2	2020-21					
222222222222	Education Corporation or Network Name	Example School 2	2021-22					
222222222222	Education Corporation or Network Name	Example School 2	2022-23					

R-01ac - Community Need and Proposed School Impact

SCHOOL ESTABLISHMENT

a. Community Description and Need

Rationale for selecting the community

Courtney Murphy, the lead applicant, has always loved the small-town charm of Ballston Spa, where she attended school from kindergarten through twelfth grade. After teaching in Harlem and later relocating to Schenectady during the COVID-19 pandemic, she found herself yearning for the close-knit, welcoming atmosphere of her hometown. While both cities were rich in their own ways, they left Courtney missing the sense of community that defines Ballston Spa. Known as “the village of friends,” it’s a place where familiar faces are found at the post office or grocery store, and deep-rooted connections thrive. These values of connection, support, and belonging are the foundation Courtney aims to bring to her charter school, creating an environment where students can grow in a caring, unified community.

Upon moving back to the community as a parent of three, Courtney soon realized that Ballston Spa’s universal pre-k programs lacked accessible innovative learning models. She was seeking schools that focus on child-centered learning, individualized attention, hands on/project based learning, and social emotional learning. Additionally, her older daughter had attended a Montessori primary classroom for three years, and she was interested to see if there were any financially sound options for her family. However, any free universal pre-k programs she looked into didn’t check all of those boxes, and the programs she finally found that did meet the needs and wants for her children were private. The costs of such programs were prohibitive not just for her own family, but many families in the area, making it a significant financial challenge for certain community members to benefit from such unique and beneficial education experiences. Additionally, her oldest child would attend the local elementary school, only for her and her husband to find out due to zoning she had been placed in the lowest performing of four elementary schools. If she wanted her children to attend a high performing Montessori school that was financially accessible to all, she may have to create one.

Courtney has spent ten plus years of her career working in urban Charter schools- located in Harlem and Albany- and recognizes that charters are a powerful tool for diversifying educational opportunities and ensuring that every student, regardless of where they live, has access to the best possible learning experience. In seeking a community based pre-k program for her own children, she realized there was an opportunity within the community to bring a free public Montessori micro-school to the area that would ‘check all the boxes’ for parents seeking an innovative approach to learning, atypical of the other private options in her hometown and the surrounding communities.

Founding team members' connections and ties to the proposed community of location

Courtney Murphy was raised in Ballston Spa and graduated from its schools in 2005. After college, she returned home to live with her mother and sisters. She was a substitute teacher for 5 years in Ballston Spa Central School District while working towards her Masters degree. She also coached the middle school volleyball team during this time. She later left to teach in Harlem. When the COVID-19 pandemic hit, she returned again to her childhood home. Courtney later moved to Schenectady for a job as an assistant principal, but after a few years, she felt the pull to return to Ballston Spa—the village she's always considered home. Now, she lives there with her high school sweetheart turned husband and their three children, continuing to raise her family in the place she's always returned to.

All of our founding board members are connected to Ballston Spa through just six degrees of separation. Whether through a family friend, an old acquaintance, a cousin, or a work connection, our paths have all intersected in ways that led us to this shared journey. While not all of us live directly in Ballston Spa, we are deeply invested in its future and proud to be part of a team dedicated to creating a community-driven educational choice for families. We have a board member who is a parent in BSCSD to four young girls, a parent in the neighboring district who is the parent of a son with a disability, a board member whose husband has taught in BSCSD for over 20 years, and a local preschool teacher from a neighboring town- for example. All board members of Wildflower Upstate New York have a strong connection to the community, whether through direct relationships with Courtney or through other friends and family ties. This deep-rooted network reflects our commitment to fostering a school that truly serves and understands the needs of our local families. Our "Village of Friends" moniker is more than just a phrase—it is a guiding principle in the makeup of our board, ensuring that the leadership remains grounded in the values, experiences, and aspirations of the small community we plan to serve. These relationships remind us of the importance of community—of the bonds that bring people together and the support that helps them thrive. That sense of connection is exactly what we hope to promote in our classrooms, fostering an environment where students and families feel valued, supported, and empowered.

Why this school and why this place:

While Ballston Spa is best described as a rural-suburban community—and may appear atypical compared to the predominantly urban landscape of SUNY Charter Schools Institute's portfolio—we believe our region is no less deserving of innovative public education options. Wildflower Upstate New York Charter School (WUNYCS) seeks to meet the unique needs and aspirations of our small community by expanding access to the Montessori curriculum within the public sector. Our mission is rooted in the belief that high-quality, child-centered education should be available to all families, regardless of geography. Through our community engagement efforts, families have expressed a clear desire for a small, community-embedded childcare setting that fosters close, meaningful relationships among staff, students and families. We plan to offer the following programming that families have prioritized in our ongoing communication:

- Individualized learning
- Hands-on learning opportunities
- Affordable programming
- Mixed-age classrooms
- A diverse student body and staff alike
- A safe, inclusive learning environment that welcomes and embraces children with disabilities or differences
- A small, intimate school community that promotes a strong sense of belonging
- An authentic Montessori school

Our goal is to ensure that all children, regardless of ability or background, have the space to thrive and feel fully included in our community. A public Montessori charter school would provide an innovative, tuition-free option that meets the diverse needs of Ballston Spa families while reflecting the socioeconomic mix of our town.

Montessori education has gained widespread support in upstate New York, with a growing interest in expanding its methods within both the public and private sectors. Several Montessori schools exist in the broader Capital Region, including Albany's Montessori Magnet School and RiverRun Montessori School in Schenectady, showcasing the community's embrace of child-centered, hands-on learning. However, most Montessori schools in the region are private or magnet schools, limiting access for families who cannot afford tuition. In fact, the only Montessori school in the Ballston Spa Central School district is within a neighboring town, and is private, leaving families with few affordable alternatives.

At the same time, access to early childhood education remains a challenge in our area. While the state offers Universal Pre-K (UPK), options in Ballston Spa are slim—with some listed schools not even located in our hometown. Families seeking quality early education need more accessible and inclusive options that set children up for long-term success.

Moreover, nearly one third of students in Ballston Spa are economically disadvantaged, and current pre school offerings do not always integrate students from diverse backgrounds. While LifeWorks Community Action provides valuable assistance to unhoused families, veterans, and those below the poverty line, it isolates these students to a single location rather than integrating them into a broader, inclusive school community. Our schools should be a true reflection of our town—bringing together children from all socioeconomic backgrounds to learn, grow, and succeed side by side. Ballston Spa Montessori seeks to integrate students of all socioeconomic backgrounds.

By introducing a public Montessori charter school in Ballston Spa, we provide families with a free, high-quality, and innovative educational choice. A charter model allows for flexibility in curriculum and teaching methods, making it possible to implement Montessori's hands-on, student-driven approach while ensuring equitable access for all. With support from national organizations like the National Center for Montessori in the Public Sector (NCMPS), which advocates for expanding Montessori in public education, we have an opportunity to lead the way in educational innovation while staying true to our community's values.

A public Montessori charter school in Ballston Spa would bridge gaps in early education, promote socioeconomic diversity, and provide an inclusive, high-quality learning environment for all children—regardless of their background or financial status. It is with these goals in mind that we move forward in making this vision a reality for our town.

A description of the community

Ballston Spa, New York, is a village situated in Saratoga County, approximately 30 miles north of Albany. It offers a blend of rural and suburban characteristics, featuring a mix of residential neighborhoods, agricultural areas, and natural landscapes. The village is known for its charming downtown, historical significance (especially regarding its role as a former spa town in the 19th century).

Roughly 18% of students in Ballston Spa Central School District have disabilities, similar to the 15-16% New York State Average. The presence of economically disadvantaged students (36%) indicates a segment of the population facing financial challenges. 33.3% of students in Ballston Spa Central School District qualify for free/reduced lunch, and one of the four elementary schools (Wood Road Elementary) is a Title 1 school. When you disaggregate data by elementary school, the data shifts significantly- showing that Wood Road elementary serves 24% students with disabilities, 49% economically disadvantaged students.[1] The sole middle school, Ballston Spa Middle School, which pools students from four elementary schools in the town, is also a Title 1 school because of the high percentage of students from low-income families.

Our school will draw students from Ballston Spa, as well as surrounding communities such as Malta, Ballston, and the town of Milton, all of which make up the Ballston Spa Central School Districts student body. As a charter school, we will also expand our reach to include families interested in sending their children who may be from other areas of the capital region.

Community demographics

Ballston Spa is a village located in Saratoga County, New York, with a population of approximately 5,356, according to the 2022 U.S. Census estimates. The village is served by the Ballston Spa Central School District (BSCSD), which also encompasses parts of nearby communities, including Malta and Milton.

According to the U.S. Census Bureau's 2022 data for Ballston Spa village, New York, the village encompasses a land area of 1.6 square miles. The population was recorded at 4,977, reflecting a decline from previous years. The median household income was estimated at $77,943, with a per capita income of $43,321. The racial composition was predominantly White at 90.4%, followed by Other Race/Two or More Races at 6.4%, and Hispanic or Latino (of any race) at 1.7%. Educational attainment indicated that 93.7% of residents had completed high school or higher, and 42.0% held a bachelor's degree or higher. The median property value was

[1] New York State Education Department (NYSED, 2023). *School Report Card Data – Ballston Spa CSD.* Retrieved from: https://data.nysed.gov/

reported at $302,408, with a homeownership rate of 59.3%. Additionally, the village had a population density of approximately 3,105 people per square mile. While English remains the dominant language, Spanish and other languages are also spoken, reflecting the area's growing diversity.[2]

Within the Ballston Spa Central School District, approximately 4,030 students are enrolled across its schools. The racial and ethnic breakdown of students during the 2023-24 school year shows that 85% identify as White, 6% as Hispanic or Latino, 3% as Black or African American, 2% as Asian, and 4% as multiracial or other. Additionally, 18% of students receive special education services, while 36% are considered economically disadvantaged and qualify for free or reduced-price lunch. The district also serves a small but growing population of English Language Learners (ELLs), who currently make up 2.2% of the student body.[3]

Demographic trends in Ballston Spa indicate a slow but steady increase in diversity, particularly among Hispanic/Latino and multiracial student populations. Economic need has also risen slightly over the past five years, as 36% of students classified as economically disadvantaged, aligns with broader national trends. The percentage of students with disabilities (18%) remains consistent with state averages. While the ELL population remains relatively small, it has experienced gradual growth over recent years. Additionally, two schools—Wood Road Elementary and Ballston Spa Middle School—are designated as Title I schools and receive federal funding to support students from low-income families. These trends reflect ongoing shifts in the community's demographic and economic landscape, influencing the district's educational priorities and resource allocation.

Performance of local schools in the community

Ballston Spa offers a mix of public and nonpublic (private and religious) schools, each with unique strengths and challenges. Below is an overview of Ballston Spa Central School District (BSCSD) and private school options, highlighting their advantages and potential areas for improvement. While New York State does not administer standardized testing for kindergarteners, overall elementary-level performance can serve as an indicator of early education effectiveness. According to the following tables for the 2023-2024 school year, elementary students in BSCSD (3-5th) on average across the district performed well on NYS assessments. Our elementary students performed in line with NY state average proficiency scores in ELA and in math outperformed NY state students average proficiency scores. [4]

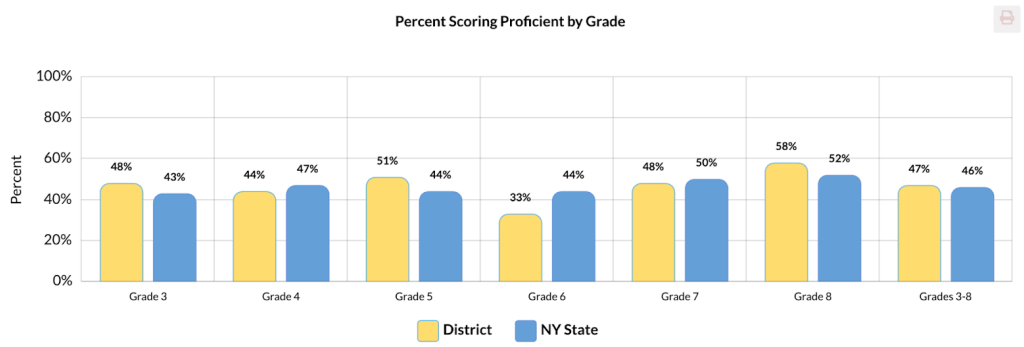
[2] U.S. Census Bureau. (2022). *QuickFacts: Ballston town, Saratoga County, New York.* Retrieved from https://www.census.gov/quickfacts/fact/table/ballstontownsaratogacountynewyork/PST045223

[3] New York State Education Department (NYSED, 2023). *School Report Card Data – Ballston Spa CSD.* Retrieved from: https://data.nysed.gov/

[4] New York State Education Department. (2024). *Every Student Succeeds Act (ESSA) Accountability Report.* Retrieved from https://data.nysed.gov/essa.php?instid=800000038604&year=2024&createreport=1&38ELA=1&38MATH=1&48SCI=1

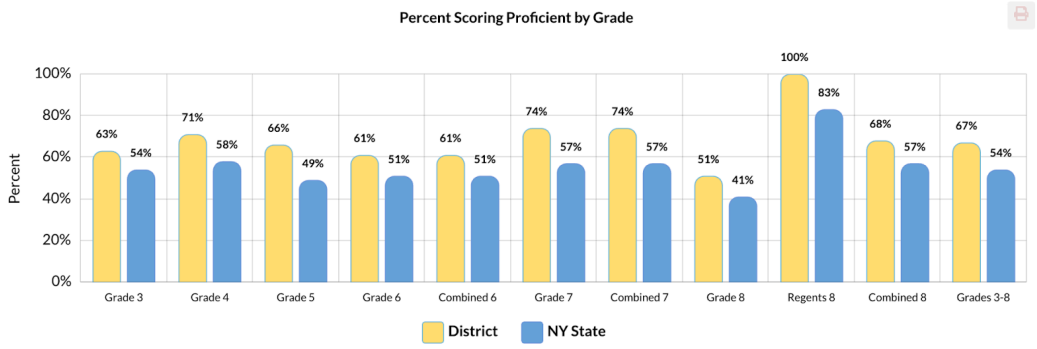
GRADES 3-8 ENGLISH LANGUAGE ARTS RESULTS (2023-24)

SUMMARY RESULTS



GRADES 3-8 MATHEMATICS RESULTS (2023-24)

SUMMARY RESULTS



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While Ballston Spa Central School District (BSCSD) elementary schools perform well overall as a whole compared to NY state, a closer analysis of student performance data reveals significant disparities when disaggregating results by socioeconomic status. Most of the district's elementary schools maintain proficiency rates that align with or exceed state averages; however, Wood Road Elementary, which serves the highest percentage of economically disadvantaged students, consistently underperforms compared to the district's other elementary schools. As mentioned prior, they also serve the highest population of students with disabilities.

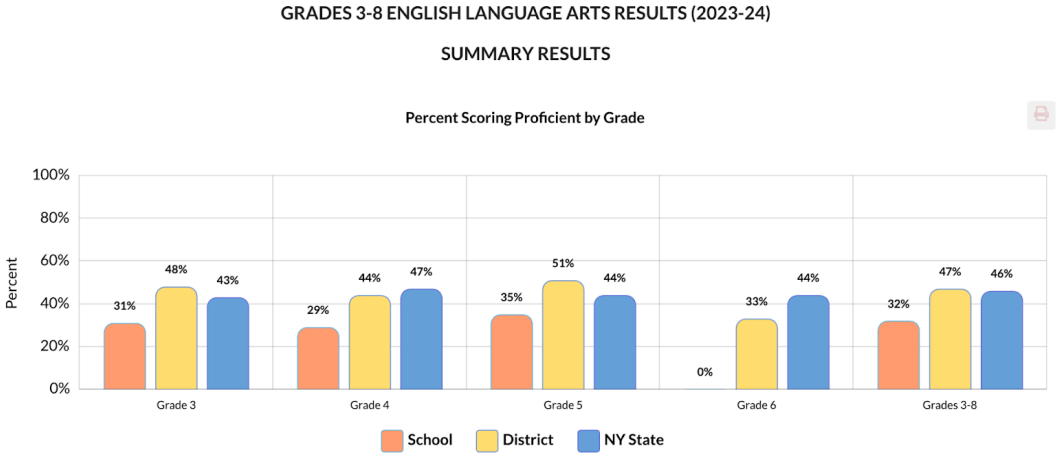
Given that our proposed school will serve a similar demographic—as a tuition-free charter prioritizing students with disabilities through weighted lotteries in enrollment and forming partnerships to expand access for economically disadvantaged families—this isolated data is particularly relevant. When isolating performance metrics for Wood Road Elementary, the overall proficiency rates in state testing drop significantly compared to district-wide

[5] New York State Education Department. (2024). *Every Student Succeeds Act (ESSA) Accountability Report.* Retrieved from https://data.nysed.gov/essa.php?instid=800000038584&year=2024&createreport=1&38ELA=1&38MATH=1&48SCI=1&nyseslat=1&nysaa=1

averages, highlighting an urgent need for additional educational strategies and supports to better serve this specific student population.

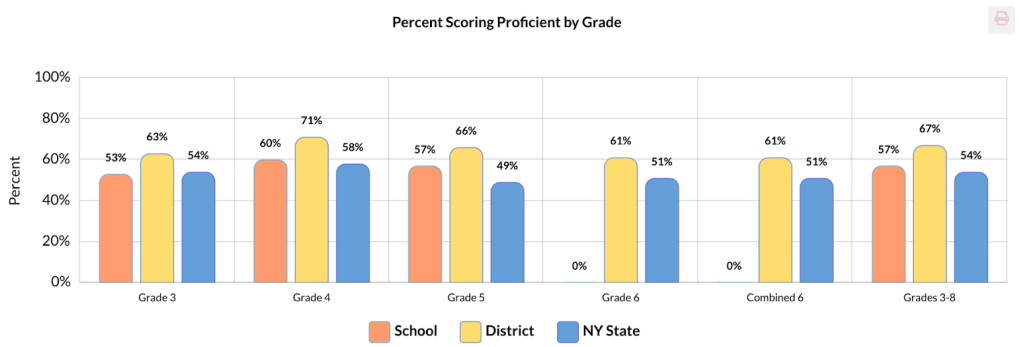
Ballston Spa operates a zoned school system, meaning families residing in the Wood Road Elementary zone are required to send their children to that school unless they pursue alternative options outside the district. Families should have the ability to choose an educational environment that best meets their child's needs, particularly when their assigned school is not achieving strong academic outcomes. Additionally, with an enrollment of nearly 300-500 students in each elementary school, Wood Road may not be the ideal setting for every child, especially those with disabilities who may thrive in a smaller, more individualized learning environment. Our proposed school seeks to offer families a high-quality smaller alternative.

Wildflower Upstate New York offers a completely different pedagogical approach designed to increase proficiency rates while providing individualized, student-driven learning opportunities. Unlike traditional instructional models, our Montessori-based curriculum emphasizes hands-on, mastery-based learning, fostering intrinsic motivation and deeper conceptual understanding. This model is uniquely positioned to support students who have historically underperformed in traditional settings, offering a highly structured yet flexible environment that prioritizes freedom of choice, personalized instruction, and a commitment to meeting students where they are. The Montessori curriculum is still aligned to New York State standards, but does not have rigid age specific progression regarding proficiency. Students build proficiency across a three year period- deepening their relationship with teacher leaders and receiving individualized support through one on one lessons in a small class setting to approach and ultimately reach proficiency. By introducing innovative instructional practices tailored to the needs of economically disadvantaged and diverse learners, Wildflower Upstate New York aims to bridge achievement gaps while empowering students through a transformative learning experience.



GRADES 3-8 MATHEMATICS RESULTS (2023-24)

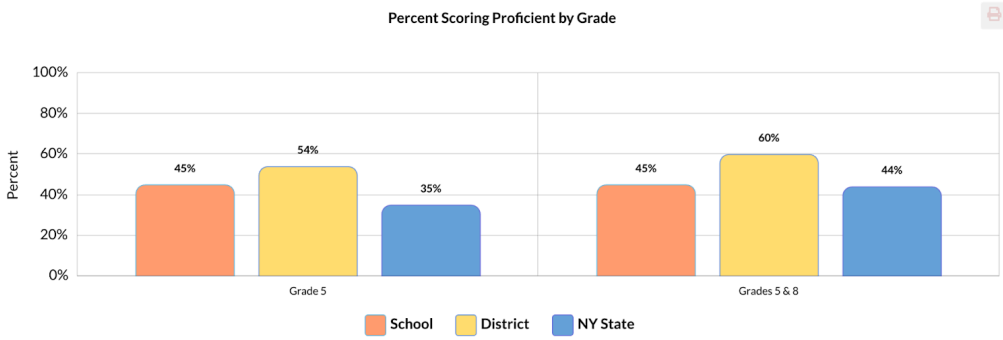
SUMMARY RESULTS



GRADES 5 & 8 SCIENCE RESULTS (2023-24)

The results of the 2023-24 Grades 5 and 8 Science tests represent student achievement on the new NYS P-12 Science Learning Standards. Because the tests measure different learning standards, the results are not comparable to those from prior years.

SUMMARY RESULTS



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Although Ballston Spa Central School District (BSCSD) students across all four elementary schools perform near the statewide average in elementary assessments, we hope to provide a new means of learning for families who are seeking something other than the current models. BSCSD's elementary curriculum differs significantly from a Montessori education. Traditional public schools, including those in BSCSD, follow a structured curriculum aligned with New York State Learning Standards, which emphasize direct instruction, standardized assessments, and grade-level benchmarks. In contrast, Montessori education follows a child-centered approach that allows students to progress at their own pace, engage in self-directed, hands-on learning, and develop independence through multi-age classrooms. The Montessori model also prioritizes intrinsic motivation, self-regulation, and collaborative learning, which stands in contrast to the more structured and teacher-directed format found in conventional elementary programs. Montessori is still

[6] New York State Education Department. (2024). *Every Student Succeeds Act (ESSA) Accountability Report.* Retrieved from https://data.nysed.gov/essa.php?instid=800000038584&year=2024&createreport=1&38ELA=1&38MATH=1&48SCI=1&nyseslat=1&nysaa=1

aligned to NYS standards, but allows for more choice and independence in the learning environment than our current models.

As Wildflower Upstate New York grows, we plan to eventually serve students through 6th grade, providing a continuous, developmentally aligned Montessori education. At the local middle school, the only one in the district, recent state assessment data shows that just 33% of students met proficiency in English Language Arts over the past two years[7]. While math scores were comparatively stronger at 61%, these figures highlight a clear need to strengthen language and literacy skills. The Montessori approach, with its emphasis on rich, integrated language experiences and individualized learning, is uniquely positioned to support this area of growth within our community.

While BSCSD provides a decent academic foundation, a public Montessori school would offer an alternative option for families seeking a different educational approach that fosters individualized learning and deeper engagement with materials. While Montessori education acknowledges the importance of academic proficiency, it also recognizes that standardized test scores are not the sole measure of a student's knowledge, capabilities, or overall well-being. The Montessori philosophy emphasizes a holistic approach to assessment, valuing critical thinking, problem-solving, executive functioning, and social-emotional growth alongside traditional academic skills.

While we recognize that our charter proposal is specifically focused on students in kindergarten and above, we have included an overview of programming for preschool-aged children (age 3) and Universal Pre-K (age 4). We believe that a strong educational foundation for later schooling begins in early childhood, and based on our experience in researching current offerings pre-k options, including extended waitlists and a lack of innovative options, we hope to establish a separate 501(c)(3) organization dedicated to serving these younger learners once our charter is approved.

Name of School	Current wait list for September 2025 as of February 2025 (if Pre-k program)	Tuition if known	Strengths	Weaknesses
Ballston Area Community Center	Unknown, won't know until end of March once	3 year olds: $1,188/month 4 years: UPK	-Tuition free 4+ -Prepares children for success in kindergarten	Limited availability Half day schedule

[7] New York State Education Department. (n.d.). *Ballston Spa Middle School: NYSED data site*. Retrieved April 2, 2025, from https://data.nysed.gov/profile.php?instid=800000038583

	lotteries finished		-Community-Based Setting: BACC is a well-known, family-friendly resource in the Ballston Spa area. -No licensing violations in the past 5 years	
Childtime of Ballston Spa	4 families	3 year olds: $1,188/month 4 year olds: UPK	Curriculum inspired by the Reggio Emilia approach	Multiple violations over the last five years regarding supervision and behavior management concerns
Childtime of Mechanicville	Unknown, won't know until end of March once lotteries finished	3 year olds: $1,376/month 4 year olds: UPK	Curriculum inspired by the Reggio Emilia approach	Multiple violations in the last five years regarding supervision/safety hazards.
Jumper Bean Preschool	At capacity for for fall, waitlist is not publicly shared	3 year olds: $1483.60/month 4 year olds: UPK	-Brightwheel parent app keeps families updated throughout the child's day -Organic meals served	Past inspections yield licensing violations Limited capacity
Life Works	Unknown, won't know until end of March once lotteries finished	Federally funded tuition free program for certain criteria 4 year olds: UPK	-Tuition free if income eligible or unhoused, including meals -Provides family support services -SWD's given priority for enrollment	Families must meet income or special circumstances to enroll Program availability and capacity subject to government funding
Little Achievers	45 families	-$1,424/ Month 3	-Positive feedback from community	Past inspections yield licensing

Child Care and Learning Center		years 4 year olds: UPK	-High community interest	violations Currently serves no students with disabilities Significant wait list
Advanced Therapy 71 Rowland St Opening Fall 2025	Unknown, won't know until end of March once lotteries finished	Tuition unknown UPK-4 years	-Pre-k with integrated therapy offerings -Special Class -Special Class in an Integrated Setting	First opens Fall 2025 Unable to assess benefits and areas of growth as it hasn't been in operation yet
St. Mary's School 40 Thompson St	Unknown	-$7300 annually (ages 3-5) -$6,000 annually (k-5th grade)	-Character development -Faith based curriculum for families interested	Not a UPK provider Tuition based
Church Mouse Nursery School 202 Milton Ave	Unknown	Tuition unknown	-Faith based curriculum for families interested -Small class sizes	Not a UPK provider Only half days, and different age groups attend different days of the week (Example: 3 year olds Tues/Thurs 9-11:30) Tuition based
Malta Montessori 100 Saratoga Village Blvd	8 families	$12,000+ annually (ages 3-5)	Authentic Montessori Small class sizes	Not a UPK provider Not directly in Ballston Spa Tuition based
Milton Terrace Elementary School	Elementary program- no waitlist	Free	-67% average ELA across grades 3-5 on NYS ELA assessment -66% average on 5th NYS Science assessment -79% average across grades 3-5 on NYS math assessment	20.4% chronic absenteeism 394 students (large school setting)

Wood Road Elementary School	Elementary program- no waitlist	Free	High enrollment	-21.3% chronic absenteeism -494 students (large school setting) -31% average ELA across grades 3-5 on NYS ELA assessment -56% average across grades 3-5 on NYS math assessment -45% average on 5th NYS Science assessment
Gordon Creek Elementary School	Elementary program- no waitlist	Free	94% attendance rate -66% average across grades 3-5 on NYS math assessment	-452 students (large school setting) -46% average ELA across grades 3-5 on NYS ELA assessment -52% average on 5th NYS Science assessment
Malta Ave Elementary School	Elementary program- no waitlist	Free	67% average across grades 3-5 on NYS math assessment	-336 students (large school setting) 18.7% chronic absenteeism -55% average ELA across grades 3-5 on NYS ELA assessment -53% average on 5th NYS Science assessment
Ballston Spa Middle School	Sole Middle School in District	Free	61% proficiency rate 6th grade NYS Math assessment the last two years	-33% proficiency rate on NYS ELA Assessment the last two years -897 students (large school setting)

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[8] New York State Education Department. (2024). *Ballston Spa Central School District report card*. NYSED Data Site. https://data.nysed.gov/profile.php?instid=800000038601

Providing a Needed Alternative for the Community

As a district, averages of around 50% proficiency rate on state assessments indicates that half of the students in our district are not meeting the most current standardized benchmarks for academic achievement. This suggests a significant portion of students require additional support and targeted interventions to reach proficiency levels in core subject areas. While standardized tests are just one measure of student success, these results highlight the need for innovative instructional approaches that address diverse learning styles, promote mastery-based learning, and provide differentiated support to ensure all students achieve academic growth and success.

Our Montessori charter school will offer a much-needed alternative in the Ballston Spa area by providing a tuition-free, high-quality Montessori education—a model currently unavailable in any public school in our area. While there are several private Montessori options, such as Malta Montessori, accessibility is limited due to tuition costs and long waitlists. As of February 2025, enrollment demand for Fall 2025 is already high, with waitlists of 8 families at Malta Montessori already. Alternatives in the area are as high (again, in February 2025) as 45 families at Little Achievers for pre-k programming, indicating a clear gap: the high demand for quality early childhood education in the Ballston Spa area is evident in the significant waitlists at existing programs. Establishing our k-6th charter school is the first step towards later establishing our separate 501(c)(3) for pre-k options in our village. Lastly, each of our elementary schools enrolls on average between 350-to almost 500 students. For some families, these schools are simply too big for their child. By maintaining small class sizes and ensuring we stay true to a micro-school model of just 59 students in k-6th in year five, we provide a unique alternative to our district's larger programs. Especially for families of students with disabilities, our unique small setting ensures the necessary individualized attention all students benefit from- but especially those who have IEPs. Our proposed Montessori charter school would also address the financial gap by expanding access to an innovative, research-backed educational model that is currently unavailable in the public sector. While the local public elementary schools do have high enrollment numbers, none of them are Montessori schools. There is a gap to be filled within regards to alternate curriculum models in BSCSD.

A Montessori micro-school offers a uniquely supportive and inclusive environment for students with disabilities, particularly when compared to the structure of a traditional 350-500-student elementary program we currently have in our local schools. With its intentionally small size, a micro-school fosters close relationships between students, teachers, and families, allowing for highly personalized instruction and a deeper understanding of each child’s learning profile. In contrast to larger schools where students with disabilities may be pulled out or siloed, Montessori classrooms are designed to be naturally inclusive, with mixed-age groupings that promote peer modeling, collaboration, and community. We hope to provide an alternative to the larger school settings with a focus on an intimate space where relationships are formed in a small group setting across a three year age span in a single class.

Additionally, there are currently no charter schools in Ballston Spa or the immediate

surrounding area that offer an alternative curriculum or programming compared to traditional district schools. The nearest charter schools are located in Albany and Troy, NY, a 30+ minute drive from BSCSD, and none of these charters currently utilize an authentic Montessori curriculum. By establishing a public Montessori charter school, we are providing a free, research-backed educational approach that emphasizes independent learning, hands-on experiences, and social-emotional growth—all of which have been shown to enhance long-term academic success.

How Montessori Provides Greater Educational Benefit

Montessori education has been proven to yield stronger academic and social-emotional outcomes compared to traditional early childhood education options. Research from Lillard & Else-Quest (2006) found that by kindergarten, students in Montessori programs showed higher achievement in math and literacy, stronger executive functioning skills, and greater social-emotional development than their peers in conventional education settings[9]. Additionally, a 2017 longitudinal study found that Montessori students outperformed their non-Montessori peers in academic achievement, creativity, and problem-solving skills by middle school. [10]Unlike traditional UPK programs, which often rely on teacher-directed instruction, Montessori fosters self-motivated, hands-on learning, encouraging children to develop critical thinking, independence, and collaboration skills—all of which lead to long-term academic success. Our proposed charter school would fill this gap by making Montessori education accessible to all families, regardless of income level, ensuring that more children in Ballston Spa can benefit from this innovative, evidence-based approach.

At Wildflower Upstate New York, we are committed to raising proficiency scores while also implementing alternative, developmentally appropriate methods of assessing a child's comprehensive learning and well-being. Our approach includes observational assessments, student portfolios, self-reflection practices, and mastery-based progression, ensuring that each child's unique strengths, learning style, and growth trajectory are honored. Additionally, we place a strong emphasis on social-emotional learning (SEL), recognizing that academic success is deeply connected to a child's emotional regulation, resilience, and ability to navigate challenges.

By integrating Montessori's individualized, hands-on learning model with a focus on SEL and multiple forms of assessment, Wildflower Upstate New York provides a more complete and accurate picture of student development. This ensures that children are not only meeting proficiency benchmarks through NYS assessments but are also developing the confidence, independence, and emotional intelligence necessary for lifelong success.

Programmatic Impact:

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[9] Lillard, A. S., & Else-Quest, N. (2006). Evaluating Montessori education. *Science*, 313(5795), 1893–1894. https://doi.org/10.1126/science.1132362

[10] Lillard, A. S., Heise, M. J., Richey, E. M., Tong, X., Hart, A., & Bray, P. M. (2017). Montessori preschool elevates and equalizes child outcomes: A longitudinal study. *Frontiers in Psychology*, 8, 1783. https://doi.org/10.3389/fpsyg.2017.01783

Included in the tables below are the public schools within the Ballston Spa Central School District that offer Universal Pre-K (UPK) programs, as well as local private/independent schools in the same district with the same age range of which we would enroll (k-6). These schools have been analyzed based on their educational model, grade level, program offerings, and costs.

School Name	Public or Private*	Grades Served	Open Enrollment? Grade?
Gordon Creek Elementary School	Public	k-5	None- student attends zoned school based on residence
Milton Terrace Elementary School	Public	k-5	None- student attends zoned school based on residence
Wood Road Elementary School	Public	k-5	None- student attends zoned school based on residence
Malta Avenue Elementary School	Public	k-5	None- student attends zoned school based on residence
Ballston Spa Middle School	Public	6-8	Only middle school in this district
St Mary's School	Private (Catholic)	Pre-k-5	Yes, though final application decisions at the discretion of school after structured interview process
Church Mouse Nursery School	Private (Faith-based)	Pre-k only	Yes, and students can enroll at any time
Malta Montessori	Private	Pre-k-6	No. Application requires parent and student interview and placement decisions made at the discretion of head of school
Ballston Area Community Center	Public	UPK 4	Solely for BSCSD students age 4 by Dec 1, must enroll from Feb 10-March 28.
Childtime of Ballston Spa	Public	Infant Toddler Pre k 3	Yes- students can enroll at any time

		UPK 4	
Childtime of Mechanicville	Public	Infant Toddler Pre k 3 UPK 4	Yes- students can enroll at any time
Jumper Bean Preschool	Public	Infant Toddler Pre k 3 UPK 4	Enrollment opens in June and occasionally they may have space open mid-year
Life Works	Public	Pre k 3-4	Yes- students can enroll anytime
Little Achievers Child Care and Learning Center	Public	Infant Toddler Pre k 3 UPK 4	Solely for BSCSD students age 4 by Dec 1, must enroll from Feb 10-March 28. Infant/Toddler/Pre-k 3 enrollment periods vary
Advanced Therapy	Public	UPK 4	Unclear, not opening until Fall 2025

**Note: There are currently no charter schools in Ballston Spa Central School District*

Ballston Spa has a mix of public, private, and early childhood education options, yet gaps remain—especially for students with disabilities and those from lower socioeconomic backgrounds. Demographic trends indicate increasing economic need, slow but steady diversification, and a growing demand for specialized educational models, which will impact future school enrollments and resource allocation.

Ballston Spa Central School District offers strong academic programs, including well-regarded STEM initiatives and an Early College High School that provides students with advanced learning opportunities. Special education services are available and aligned with New York State regulations, ensuring that students with disabilities receive necessary support. Additionally, Universal Pre-K (UPK) programs provide free early education for eligible families, though limited capacity prevents full access for all who need it.

Despite these strengths, gaps remain in educational choice and accessibility. There are currently no Montessori programs within Ballston Spa, and the neighboring town which does have a Montessori school is private, limiting options for families seeking an innovative learning model. UPK availability is scarce, with long wait lists reported by families in the area. The district also has a high special education population (18%) and the number of economically disadvantaged students (36%) continues to rise, underscoring the urgent need for more accessible, high-quality early education options that better serve diverse learning needs. As of

the 2023-2024 school year 3% of BSCSD students were experiencing homelessness.[11]

Given the ongoing demographic shifts and educational gaps, a new Montessori charter school would provide significant benefits:

- Increases access to early childhood education, especially for low-income families
- Expands special education options, integrating students with disabilities
- Addresses high waitlists at both private Montessori and Pre-K programs
- Provides a research-backed alternative to traditional public school models

The economic landscape of Ballston Spa is shifting, with 36% of students in the Ballston Spa Central School District (BSCSD) now classified as economically disadvantaged, a number that has steadily increased over the past five years. This rise in financial hardship places greater demand on tuition-free early education, yet limited Universal Pre-K spots mean that many low-income families are left without access to early learning opportunities. There are currently 7 UPK options in BSCSD, however in the 2023-2024 school year there were 255[12] students in kindergarten. Even if each UPK-4 location could accept a class of 25 students, that's only 175 4 year olds enrolled, meaning only 68% of 4 year old students in the district could utilize the available tuition free option. Again, we know the foundation for early childhood education starts in preschool, and we currently don't have enough seats for our 3 and 4 year olds in BSCSD. Our proposed charter is part one of a two step process to provide further academic choice for pre k-6th grade students.

As stated, 18% of students in BSCSD have IEP's, aligning with state averages but highlighting the need for stronger inclusion models that fully integrate students with disabilities into the learning environment. Unfortunately, some current pre-schools (such as Little Achievers) have named they are an inclusive setting, but at the same time then explained over email that they have no current students with disabilities enrolled. For families to feel comfortable sending their students to an inclusive environment, the student enrollment should truly reflect that they have done outreach and welcomed students with disabilities to their programming. Per the 2023-2024 Special Education School District Data Profile (2023-2024 not yet released), there were 73 preschool students with disabilities. The Ballston Spa Central School District (BSCSD) did not meet state targets in several key areas related to the Least Restrictive Environment (LRE) and parental involvement for students with disabilities. For Indicator 5, which measures the percentage of school-age students with disabilities spending less than 40% of their day in a general education setting, BSCSD reported 22.3%, exceeding the state target of ≤17.8%. Similarly, for Indicator 6, which assesses preschool students receiving special education services within a general education classroom, BSCSD reported 35.9%, falling short of the state target of 40%. Additionally, Indicator 8, which measures parental involvement in improving services and outcomes for students with disabilities, showed that 84.8% of BSCSD

[11] New York State Education Department. (2024). *Ballston Spa Central School District report card*. NYSED Data Site. https://data.nysed.gov/profile.php?instid=800000038601

[12] New York State Education Department. (2024). *Ballston Spa Central School District report card*. NYSED Data Site. https://data.nysed.gov/profile.php?instid=800000038601

parents felt schools facilitated meaningful engagement, which is below the state's recommended benchmark of 94% or higher. These areas highlight opportunities for the district to enhance inclusive education practices and strengthen partnerships with families to better support students with disabilities. [13]As these demographic shifts continue, the demand for UPK is expected to exceed availability, forcing more families to either seek private alternatives or forgo Pre-K entirely. If we are approved for our charter, we would then apply for a separate 501(c)(3) in order to start a pre-k program for ages 3 and 4, and partner with BSCSD to operate the pre-k 4 through Universal pre-k. These discussions have already started with the Mayor of Ballston Spa as well as the District Superintendent.

While the SWD population for the entire district is projected to remain around 18%, the need for inclusive, high-quality special education services will grow. In our title 1 elementary school, Wood Road, the percentage of students with disabilities was most recently 24%. Meanwhile, the percentage of economically disadvantaged students is likely to surpass 36%, increasing the demand for affordable, accessible, and innovative school options. In our title 1 elementary school, Wood Road, the percentage of economically disadvantaged students was 49%[14]. In the private sector, Montessori and faith-based schools will continue to see high waitlists, as demand for alternative education models outpaces available capacity. However, these schools remain financially out of reach for many families, leaving lower-income students with few viable options.

A Montessori charter school would provide a tuition-free, inclusive alternative, addressing gaps in the current educational landscape. By offering a developmentally appropriate, student-centered curriculum, this new option could serve both special education and economically disadvantaged students in an integrated learning environment. Additionally, as no public schools in the region currently offer Montessori education, this model would fill a critical gap, expanding access to a proven approach that fosters independence, creativity, and academic success.

The introduction of a Montessori microschool in Ballston Spa, starting with just 16 students, would provide an alternative educational option for families while having a minimal immediate impact on enrollment and funding in Ballston Spa Central School District (BSCSD) and existing private/non-public schools. However, over time, its expansion could influence local educational choices, competition, and program offerings.

With over 4,000 students enrolled in BSCSD, the initial shift of enrollment of 16 students would be negligible in terms of district-wide enrollment. However, when the microschool expands in future years, more families may opt for Montessori education, particularly those dissatisfied with more traditional options. Public school funding is tied to enrollment, so if a noticeable number of students leave for private or alternative education, the district could see a

[13] New York State Education Department. (n.d.). *Special Education School District Data Profile: Ballston Spa Central School District*. Retrieved from https://data.nysed.gov/specialed/?instid=800000038604

[14] New York State Education Department. (2024). *Ballston Spa Central School District report card*. NYSED Data Site. https://data.nysed.gov/profile.php?instid=800000038601

slight funding decrease. However, at full build out the financial impact on BSCSD would likely be minimal due to our commitment to creating a microschool, and purposefully remaining small.

Academic Program Influence:

- No Montessori Alternative in BSCSD: Currently, BSCSD does not offer a Montessori-based curriculum, meaning the microschool would not directly compete with an existing district program.
- Potential Influence on BSCSD: When demand for Montessori grows, BSCSD may be encouraged to explore more child-centered, hands-on learning approaches or expand Pre-K options.
- Special Education Considerations: BSCSD serves 18% students with disabilities. Since our microschool model mission and vision is to provide inclusive Montessori special education options, it may attract families seeking alternative special education approaches.

Financial Considerations:

- Per-Pupil Funding Impact: A small shift of students to the microschool would have little immediate effect on BSCSD's state funding, as per-pupil funding is adjusted gradually. The Ballston Spa Central School District (BSCSD) had a total budget of $107,179,996 for the 2024-2025 school year. With per-pupil spending around $14,259 and an enrollment goal of 16 students in our first year, totaling approximately $228,144 in total per-pupil funding, this represents approximately 0.21% of BSCSD's budget.[15]. As mentioned previously, the initial shift would be minor in regards to financial impact.
- Universal Pre-K (UPK) Enrollment: With limited UPK spots in Ballston Spa, some families unable to secure a seat might choose our school instead, reducing strain on the district's UPK capacity.

Existing Private & Religious School Options:

- Nearby private and faith-based schools, including Malta Montessori, Little Achievers, St. Mary's School, and Church Mouse, already have high demand and, in some cases, waitlists (Malta Montessori: 8+ families; Little Achievers: 45+ families for Fall 2025 as of February 2025).
- The microschool would absorb some of this unmet demand, providing an option for families who cannot afford tuition at private Montessori schools or cannot access a seat in local faith-based schools.

[15] Ballston Spa Central School District. (2024, May 21). 2024-25 Annual Budget Vote and Board of Education Elections. https://www.bscsd.org/about/news/post-details/~board/2023-24-district-news/post/2024-25-annual-budget-vote-and-board-of-education-elections

Enrollment Redistribution:

- Minimal impact on faith-based schools like St. Mary's or Church Mouse, as these attract families specifically seeking religious instruction.
- Our school would have a potential impact on private Montessori options, such as Malta Montessori, particularly when the microschool expands and offers a lower-cost (for three year olds) or tuition-free alternative (for four years old and above).
- Since the micro charter would begin by serving kindergarten and 1st grade students in year one, this could slightly reduce early elementary enrollments in BSCSD's traditional K-5 schools. However, BSCSD currently has multiple UPK providers and a relatively stable elementary population, so the district's enrollment may not see a significant immediate decline whatsoever given the focus on small schools (16 students in year one).

Addressing Gaps in Educational Access:

- Lack of Alternative/Innovative Education Models: Ballston Spa and BSCSD do not offer public Montessori or progressive education models, creating a clear gap for families seeking this innovative approach.
- Limited UPK Availability: With many local UPK programs at capacity, a Montessori microschool could help meet early education demand for families who do not secure district placements. Many families in our discovery interviews expressed concern over entering a lottery system for UPK which could result in them not having a space to enroll their child.
- Access for Low-Income Families: BSCSD has 36% economically disadvantaged students, and private school tuition is often a barrier—an affordable/tuition-free Montessori option would provide greater equity in school choice.

Potential for Growth & Competition:

- If the microschool proves successful, more families may seek Montessori education, which could:
    - Lead to higher demand and longer waitlists in the existing private Montessori school.
    - Encourage BSCSD to introduce either authentic and/or Montessori-style programs.
    - Increase competition among early childhood education providers.

A Montessori microschool in Ballston Spa would have minimal immediate impact on public and non-public school enrollment but would fill an unmet need for alternative education, early childhood programs, and special education inclusion. Over time, growth beyond year one could shift enrollment patterns and encourage public and private schools to adapt to changing educational preferences. However, intentionally staying small scale and growing to a mere 59 k-6th grade students at full build out ensures that Wildflower can complement and not compete with BSCSD's current educational landscape. *Note: While Wildflower Schools has a school in the Bronx (Wildflower New York Charter School) we are not replicating said school.*

c. Fiscal Impact

Enrollment expectations

The projected programmatic and fiscal impact of Wildflower Upstate New York Charter School on Ballston Spa Central School District (BSCSD) is expected to be minimal. As a Montessori micro-school, Wildflower is intentionally designed for small-scale, incremental growth. Our school will maintain a deliberately limited footprint within the local educational landscape. By year five, Wildflower's total enrollment is expected to reach approximately just 59 students across K-6. Given that BSCSD currently serves 1,652[16] students in its elementary schools, this represents a modest shift of approximately 3.6% in total enrollment—one that is unlikely to significantly disrupt district operations. With a new residential plan on the horizon to bring in roughly 500 new residents across the next few years to BSCSD, we predict our impact will be even lower as new students enroll in the district.

From a programmatic standpoint, Wildflower's unique Montessori curriculum serves as an alternative educational model rather than a direct competitor to traditional district schools. The school's focus on mixed-age classrooms, hands-on learning, and individualized instruction offers families an option that is not currently available in the public sector outside of New York City. This specialized approach is likely to attract families specifically seeking a Montessori education rather than those dissatisfied with BSCSD offerings, further reinforcing the notion that Wildflower will complement rather than compete with district programming.

On a fiscal level, the gradual enrollment of students into Wildflower will not result in an abrupt loss of state aid for BSCSD. Because funding follows the student, some per-pupil allocations will shift, but at a scale that allows the district to adjust over time without substantial budgetary strain. Additionally, Wildflower's presence may alleviate some pressure on BSCSD's existing pre-K and elementary school capacity by providing another tuition-free option, particularly for families who might otherwise enroll in private programs.

Overall, the school's deliberate small-scale growth model ensures that any programmatic or fiscal impact on BSCSD remains minimal, while simultaneously expanding educational options for families in the community.

Per Pupil Assumptions

Based on the most recent New York State Education Department (NYSED) data for Charter Rates, BSCSD was at $14,259 per pupil[17]. This figure represents the amount allocated per student in BSCSD.

For Wildflower Upstate New York, the per-pupil allocation serves as the foundation for

[16] New York State Education Department. (2024). *Enrollment data (2024) – Ballston Spa Central School District.* Retrieved from https://data.nysed.gov/enrollment.php?year=2024&instid=800000038604

[17] New York State Education Department. (2024). *2024-2025 charter rates.* Retrieved from https://stateaid.nysed.gov/charter/pdf_docs/2024-2025_charter_rates.pdf

estimating both revenue and financial impact. As a tuition-free public Montessori microschool, Wildflower will receive per-pupil funding consistent with district allocations. In the 2024–2025 school year, the Ballston Spa Central School District (BSCSD) had a total budget of $107,179,996. With per-pupil spending estimated at $14,259, our projected first-year enrollment of 16 students would result in approximately $228,144 in total per-pupil funding—representing about 0.21% of BSCSD's total budget. At full build-out in year five, we anticipate enrolling 59 students, which would yield a projected total of $841,281 in per-pupil funding, or approximately 0.78% of the district's current budget. These estimates assume that all enrolled students reside within BSCSD and are general education students. We acknowledge that actual figures will vary based on enrollment of students with disabilities in accordance with our enrollment targets. Despite receiving a portion of district funds, Wildflower's micro-school model ensures that its financial impact on BSCSD remains minimal, representing a small fraction of the district's overall budget. To further enhance sustainability, Wildflower will also pursue grant funding, private donations, and community partnerships, ensuring a high-quality, inclusive Montessori education while maintaining fiscal responsibility.

Given our proposed model includes targeted outreach to recruit students with disabilities we anticipate receiving approximately $7,216 in additional funding per student with an Individualized Education Program (IEP). However, for the purposes of developing a fiscally responsible and conservative financial plan, our projections are based solely on general education per-pupil funding. Across our first five years, the following bullet list provides our projected funding redirected from BSCSD to Wildflower Upstate New York.

- Year 1:
    - Enrollment: 16 students
    - Funding redirected from BSCSD: $228,144
    - Percentage of BSCSD budget: 0.21%
    - Wildflower launches with a small cohort, ensuring minimal fiscal impact while establishing its Montessori foundation.

- Year 2:
    - Enrollment: 24 students
    - Funding redirected from BSCSD: $384,993
    - Percentage of BSCSD budget: 0.36%
    - Moderate growth supports deeper programming and continued fiscal responsibility.

- Year 3:
    - Enrollment: 32 students
    - Funding redirected from BSCSD: $541,842
    - Percentage of BSCSD budget: 0.51%
    - We continue to build momentum while remaining only half of 1% impact.
- Year 4:
    - Enrollment: 43 students

    - Funding redirected from BSCSD: $684,432
    - Percentage of BSCSD budget: 0.64%
    - Continued growth expands public Montessori access without significant disruption to district finances.

- Year 5:
    - Enrollment: 59 students
    - Funding redirected from BSCSD: $841,281
    - Percentage of BSCSD budget: 0.78%
    - At year 5, WUNYCS remains a fiscally responsible, community-driven option with a minimal district impact.

Wildflower Upstate New York was envisioned as a micro-charter because we believe that small, intentionally designed school communities create the conditions for deeper learning, stronger relationships, and more personalized instruction. Our Montessori model is grounded in equity, inclusion, and child-led education, which aligns naturally with a small-scale, community-embedded approach. This small scale growth model would continue past five years but continue to remain focused on maintaining steady fiscally responsible growth.

Unlike traditional charter schools that may launch with large student populations and rapid growth targets, our vision has always prioritized thoughtful, sustainable growth. We recognize that we are not on track to reach the initial projection that SUNY Charter Schools Institute has recommended of 50 students by Year 2. However, this slower growth reflects our commitment to quality over quantity, ensuring each classroom is developmentally and instructionally ready before expansion. Additionally, as mentioned prior, once approved for our charter we will establish a separate tax-exempt nonprofit organization in order to provide further options for universal pre k in our area, as well as opening our program to 3 year olds in later years (a tuition based program unless upstate New York begins providing access through universal 3k similar to NYC's program 3-k for all) bringing our primary 'class sizes' to a total of 24 students.

Over the next 5 to 7 years, we aim to build out a full learning continuum that includes:

- 5 mixed-age Montessori classrooms, with plans to continue growing by one age or grade per year, continuing our goal of slow growth.
- Approximately 24 students per classroom in authentic Montessori grade bands (primary classrooms age 3,4,5, lower elementary grade 1-3, upper elementary grade 4-6).
- A total projected enrollment of 144 students (which includes two primary classrooms with 16 3-4 year old students in each for a total of 32 students). In future years upon being renewed for our charter, this would mean serving by year 7 serving 120 students.

This long-term model allows us to remain responsive to student needs, uphold high standards of instructional fidelity, and cultivate a learning community where every child is known and supported. This is particularly important to our founding team as our mission and vision is to create accessibility to the Montessori curriculum for all students, but especially

those with disabilities. By growing at a pace that reflects both capacity and community demand, Wildflower Upstate New York will evolve into a small but mighty public school option—rooted in equity, innovation, and joy for learning.

Other projected revenue

Wildflower Upstate New York Charter School will be financially sustained through a combination of per-pupil tuition from Ballston Spa Central School District (BSCSD), special education funding, federal and state grants, and targeted fundraising efforts. In addition to the standard per-pupil allocation provided by the district, the school will actively seek supplemental funding sources to ensure a robust, high-quality Montessori education that remains tuition-free for ages 4+ to 6th grade, and accessible to all families.

As a public charter school, Wildflower Upstate New York Charter School will be eligible for federal and state education grants, including Title I funding for economically disadvantaged students, Title II funding for professional development, Title III support for English Language Learners (ELLs), and Title IV grants for student enrichment. Additionally, the school will apply for New York State Charter Schools Program (CSP) start-up grants, which provide financial assistance for new charter schools to establish programming, procure materials, and develop infrastructure. The school will also explore New York's Charter School Facilities Incentive Grants to support leasing or facility development costs.

For students with disabilities, the school will receive federal IDEA (Individuals with Disabilities Education Act) funding, along with special education reimbursements from BSCSD, ensuring that students requiring additional services such as speech therapy, occupational therapy, and specialized instruction receive the support they need. The level of special education funding will be determined based on the proportion of students with Individualized Education Programs (IEPs) and the specific services required. We hope to enroll 20% students with disabilities through our weighted lottery system.

Beyond public funding, our founding team is committed to securing private grants and philanthropic contributions from organizations that support innovative, inclusive education models. The school will seek funding from education-focused foundations, including the Walton Family Foundation, NewSchools Venture Fund, and even the Wildflower Foundation we've partnered with, all of which have historically invested in expanding high-quality educational options. Community-driven fundraising efforts, local partnerships, and donor contributions will further supplement the school's financial sustainability, ensuring that essential resources, materials, and student-centered programming remain fully funded.

By leveraging a diverse portfolio of funding sources, Wildflower Upstate New York will minimize its financial impact on BSCSD while ensuring long-term sustainability. The school's micro-school model, which grows incrementally each year, results in minimal fiscal disruption for the district. With a projected enrollment of just 59 students by year five, the total impact represents a small fraction of BSCSD's overall elementary enrollment. Through strategic financial planning, competitive grant applications, and community-driven fundraising, Wildflower

Upstate New York is committed to operating as a fiscally responsible institution while expanding access to high-quality, inclusive Montessori education in the region.

Projected budget for the school district of location

For the 2024-2025 School Year: The Board of Education in BSCSD adopted a budget of $107,179,996, representing a 2.8% increase from the 2023-2024 budget. [18] With a relatively high enrollment and an annual budget exceeding $107 million, the Ballston Spa Central School District operates on a large scale. In contrast, Wildflower Upstate New York's micro-school model is intentionally designed to grow gradually and serve a small number of students. This approach ensures that our financial impact on the district remains minimal, even as we offer an innovative, public Montessori option that expands educational choice within the community.

Yearly projected impact as a percentage of sending district's budget:

Based on the 2024-2025 adopted budget for the Ballston Spa Central School District (BSCSD), totaling $107,179,996[19], the projected financial impact of Wildflower Upstate New York's enrollment on the district's budget is as follows:

5-YEAR FISCAL IMPACT REPORT

Largest Enrollment District: Ballston Spa Central School District							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for Ballston Spa Central School District School District	Projected Impact (% of District's Total Budget)
Year 1 (2026-27)	16	14,259	228,144	- 0	228,144	107,179,996	0.213%
Year 2 (2027-28)	24	14,687	352,482	- 0	352,482	107,179,996	0.329%
Year 3 (2028-29)	32	15,127	484,076	- 0	484,076	107,179,996	0.452%
Year 4 (2029-30)	43	15,581	669,991	- 0	669,991	107,179,996	0.625%
Year 5 (2030-31)	59	16,049	946,869	- 0	946,869	107,179,996	0.883%

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	This is the 2024-2025 budget, which is all that's been approved. https://www.bscsd.org/about/financial-information#:~:text=The%20Board%20of%20Education%20approved,the%202023%2D2024%20tax%20levy.
OTHER NOTES:	

[18] **Ballston Spa Central School District.** (n.d.). *Financial information*. Retrieved March 12, 2025, from https://www.bscsd.org/about/financial-information

[19] **Ballston Spa Central School District.** (n.d.). *Financial information*. Retrieved March 12, 2025, from https://www.bscsd.org/about/financial-information

R-02ab - Addressing Need

a. Mission

Our mission at "*WUNYCS"** is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students. Our vision at "*WUNYCS"** is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging. **In our original social media marketing, we referred to ourselves as Ballston Spa Montessori. We seek to develop individual classroom names with support from the community and Teacher Leaders.*

b. Key Design Elements

At WUNYCS, we firmly believe that all children—regardless of ability—are competent, capable individuals who, in the right environment, will learn and thrive. Rooted in the 100-year-old Montessori philosophy developed by Dr. Maria Montessori, our approach moves beyond the outdated, one-size-fits-all model of education. Rather than the typical teacher lead and constant direct instruction provided- our teacher leaders instead honor each child's unique developmental journey, allowing them to progress at their own pace. Montessori's multi-age classrooms, individualized instruction, and hands-on learning create an inclusive environment where all students, including those with disabilities, receive personalized support. Montessori teachers observe, assess, and adapt lessons to meet the needs of each individual learner, ensuring that every child can experience success. Research has consistently shown that child-centered, interest-driven learning enhances cognitive development, executive function, and motivation, providing a strong foundation for all students to reach their full potential.

Key design elements include: Authentic Montessori philosophy, Mixed age classrooms, Individualized attention, Inclusive Education: prioritizing students with disabilities in enrollment, Co-taught classrooms, Focus on equity and inclusion through all aspects of school design, and Wildflower Schools 9 principles.

Wildflower schools are rooted in authentic Montessori education and all follow 9 guiding principles. They are focused on creating peaceful, child-centered environments where students learn through hands-on experiences, self-direction, and collaboration in mixed-age classrooms. Teachers serve as both educators and leaders, maintaining small, responsive school communities that allow them to make decisions based on the needs of their students and families. By embedding schools within neighborhoods in accessible, light-filled spaces,

Wildflower fosters a seamless connection between home, school, and community, ensuring that learning extends beyond the classroom and is enriched by local partnerships and civic spaces. Wildflower embraces innovation, equity, and nature as central to its educational mission. Through scientific observation and modern technology, teachers continuously refine their practice while staying true to Montessori principles. A commitment to diversity and inclusion ensures that each school actively works toward justice as the foundation for peace, providing accessible, high-quality education to families from all backgrounds. Additionally, a deep connection to nature is woven into daily experiences, with green spaces, plant life, and sustainable materials creating an environment that nurtures both the human spirit and ecological responsibility. Beauty, creativity, and collaboration across a decentralized network further define Wildflower's approach. Schools are intentionally designed to be aesthetically rich and culturally engaging, incorporating fine arts and mindfulness practices to encourage self-expression and inner growth. As part of an expanding network, each school operates independently while benefiting from the shared knowledge, resources, and support of other Wildflower educators. This balance of autonomy and collaboration ensures that every Wildflower school remains deeply connected to its unique community while contributing to the broader movement for child-centered, equity-driven education.

At WUNYCS, we are committed to values of equity and inclusion, guiding everything we do. Our small, mixed-age setting fosters a community where every child is seen, known, and safe—especially important in light of challenges like school violence and pandemic-related learning loss. We focus on the whole child, nurturing both their academic growth and emotional well-being. At our school, we unapologetically name inclusion, specifically of those with disabilities, as a top priority and focus. We understand that every child learns differently, and we are committed to providing individualized instruction and tailored accommodations to ensure all students, especially those with special needs, feel supported and have access to the resources they need to succeed.

Our co-taught staffing model, with one Montessori teacher and one teacher's assistant in each classroom, ensures that students of all ability levels receive the support they need. Additionally, students learn by observing how the two teachers collaborate and problem-solve together. This modeling promotes an inclusive and respectful classroom culture, where collaboration and diversity are valued. Teachers are empowered to be authentic and collaborate closely with families to shape the school environment. Research also shows that when teachers 'loop' with their students (or teach them across multiple years) it can have a positive effect on achievement. A study analyzing data from Tennessee found that students who had repeat teachers showed significant gains in both math and reading compared to those with different teachers each year[20]. This co-taught approach, with teachers that follow the same students across three years (if the families enroll at the start of a grade band) ensures that every child, regardless of their background or abilities, has the opportunity to thrive.

The American Montessori Society emphasizes that authentic Montessori education fosters an inclusive and supportive environment where children of all abilities and learning

[20] Kraft, M. A. (2020). *Second time's the charm? How repeat student-teacher matches build academic and behavioral skills.* EdWorkingPapers. Retrieved from https://edworkingpapers.com/sites/default/files/ai22-590.pdf

styles can thrive, including those with physical disabilities, learning differences, ADHD, and autism spectrum disorders. By prioritizing individualized learning and hands-on experiences, Montessori classrooms ensure that each child engages with materials in a way that supports their unique strengths and needs. This philosophy closely aligns with our commitment to inclusion, utilizing a weighted lottery system for students with disabilities to ensure equitable access to high-quality education.

A defining aspect of Montessori education is its multi-age classrooms, where students remain with the same teacher for three years. This structure creates stability and continuity, allowing children to focus on academic and personal growth rather than adjusting to new teachers and routines each year. The long-term relationships built between teachers and students foster trust, confidence, and individualized support, promoting both academic success and social-emotional development. The Montessori classroom is designed to be multi-sensory and hands-on, benefiting students who learn best through movement and interactive engagement while also fostering organizational and time management skills, particularly helpful for those with executive functioning challenges. In traditional classrooms, students transition to a new class each year, adjusting to different academic expectations, routines, and teachers. This frequent change can make it challenging for educators to develop a deep understanding of each student's learning style, strengths, and challenges, particularly for students with diverse learning needs who may require more individualized support.

Multi-age classrooms foster long-term relationships between teachers, students, and families, allowing for deeper understanding of each child's development. This continuity enables educators to identify learning patterns, tailor instruction, and deliver timely, individualized support—especially for students with diverse learning needs. Parents benefit from consistent collaboration, strengthening the home-school connection. Montessori teachers, trained as keen observers, adapt instruction to meet each child's needs while maintaining inclusive, peer-integrated learning environments. The multi-age classroom model encourages collaboration, mentorship, and leadership, allowing children to learn from and teach one another, reinforcing both academic and social growth- which aligns with our vision of a space where everyone feels a sense of belonging. The mixed-age structure naturally fosters self-esteem and confidence, as students progress at their own pace, focusing on their individual journey rather than comparing themselves to others. Through this approach, Montessori education creates a truly inclusive, student-centered environment where every child can thrive.[21]

The Division of Early Childhood (DEC) of the Council for Exceptional Children established a set of best practices in 2014 to support the development of children with disabilities (CWD). These include individualized teaching strategies, phased instruction, and embedding learning opportunities within natural contexts—all of which align with Montessori principles. The Montessori approach naturally supports these recommendations by emphasizing freedom of

[21] American Montessori Society. (n.d.). *Montessori, children with disabilities, and neurodivergences*. Retrieved March 5, 2025, from https://amshq.org/About-Montessori/Montessori-Children-with-Disabilities-and-Neurodivergences

movement, peer-mediated instruction, and social-emotional development, creating an inclusive and developmentally appropriate environment for all learners. The research provided clear evidence that Montessori curriculum and pedagogy align closely with the best practices required to support children with disabilities (CWD). It maps core Montessori principles, such as individualized instruction, hands-on learning, peer collaboration, and freedom of movement, to evidence-based strategies recommended for CWD. This alignment underscores how Montessori environments naturally foster inclusive, developmentally appropriate learning experiences, ensuring that students with disabilities receive the tailored support they need to thrive.[22]

One example of a Montessori program outside of Wildflower that explicitly practices inclusion is Mansio Montessori of Geneva, IL.[23] In looking over school programming that included both Montessori curriculum and catered to students with disabilities, this school stood out because of their explicit focus of emphasizing inclusion. Our model will be similar in nature to theirs. Their program is intentionally designed to include and support children with disabilities, ensuring that all students—regardless of their unique challenges—have the opportunity to thrive in a nurturing, inclusive environment. The Montessori approach fosters independence while addressing the social, emotional, physical, and intellectual needs of every child. Through individualized learning experiences, they work to create a space where children can overcome obstacles without compromising their personal growth or that of their peers. There are several Wildflower Schools that enroll students with disabilities and have found they are able to provide individualized attention in line with Montessori pedagogy while simultaneously servicing their unique needs aligned with their IEP goals. Wildflower New York Charter in the Bronx is one example, as is Hyacinth Montessori in West Philadelphia[24]. Our lead applicant Courtney was able to observe in Hyacinth and speak with Teacher Leaders about their population of students.

For children with special needs, these challenges may be more complex, requiring additional support in different areas. A physical disability might make navigating the classroom more difficult, while a learning disability could require targeted strategies to strengthen academic skills. Their goal is to empower all children, helping them move past limitations and daily frustrations while fostering confidence, resilience, and a love of learning. They ensure that students with disabilities are fully included in our classrooms by adapting the physical space, providing hands-on, child-led learning materials, and offering individualized instruction tailored to their needs. Their compassionate approach promotes understanding, respect, and collaboration, teaching all students to respond with empathy and kindness toward their peers. Above all, they are committed to maintaining a safe, supportive, and inclusive environment where every child feels valued and capable of success- which closely aligns with our mission and

[22] Long, T., Ferranti, N., & Westerman, C. (2022). *Children with disabilities attending Montessori programs in the United States*. Journal of Montessori Research, 8(2), 16–32. Retrieved from https://files.eric.ed.gov/fulltext/EJ1372147.pdf

[23] Mansio Montessori of Geneva. (n.d.). *Montessori education for children with special needs*. Retrieved March 12, 2025, from https://www.genevamontessori.org/montessori-special-education

[24] Hyacinth Montessori. (n.d.). *Hyacinth Montessori*. Retrieved March 27, 2025, from https://www.hyacinthmontessori.org/

vision at WUNYCS.

Our school will prioritize serving students with disabilities (SWD), recognizing the existing need within the Ballston Spa Central School District (BSCSD), where approximately 18%[25] of students receive special education services. This commitment aligns closely with our sibling school, Wildflower New York Charter School in the Bronx, which has demonstrated successful inclusion in their Montessori micro-school. As recently as the 2023-2024 school year, 22%[26] of the school's students had IEPs, reinforcing the Montessori model's effectiveness in servicing all students. We hope to utilize their expertise and experience as a resource as we build an accessible, student-centered learning environment for all scholars.

WUNYCS will assess its effectiveness in delivering key design elements in alignment with its mission through an annual certification process conducted by experienced Wildflower Teacher Leader peers. As part of its affiliation with Wildflower Schools, veteran Teacher Leaders from across the network will visit twice a year to observe classrooms, evaluate alignment with Wildflower's 9 Principles, and provide feedback and guidance for continuous improvement. This peer review process allows Wildflower New York's Teacher Leaders to reflect on successes, seek advice, and implement improvements that enhance the school's ability to meet the unique needs of its students and community.

The Affiliation Agreement between Wildflower Schools and the Board outlines the training, tools, and ongoing support provided to the school. Twice-yearly peer visits and the annual Wildflower Certification process ensure continued alignment with the school's educational philosophy and best practices. Committed to radical transparency, WUNYCS will regularly update the Board of Trustees on school improvement efforts and progress toward goals outlined in its Accountability Plan. A data dashboard will track academic performance, school culture, operations, and finances, enabling meaningful discussions at Board meetings. The school will engage external evaluators in an annual Programmatic Audit to assess progress and establish new goals for the upcoming year. These priorities will inform Teacher Leader roles and responsibilities, ensuring that co-teaching structures and leadership positions align with skills and support success of the school's mission.

Note: Only one adjustment was made between the Letter of Intent and the final submission of our transmittal and summary, and finalized narrative application. To maintain fiscally sound practices while upholding our commitment to a co-taught classroom model, we increased enrollment by one student per age group per year—shifting from 7 to 8 students in each age group. This shifted our enrollment numbers per year from our original letter of intent just slightly. This minor adjustment ensures the financial sustainability of our staffing structure and is detailed further in the Enrollment section of this application (R-05ac - Enrollment).

[25] New York State Education Department. (n.d.). *Enrollment data for Ballston Spa Central School District.* Retrieved from https://data.nysed.gov/enrollment.php?instid=800000038604

[26] New York City Department of Education. (n.d.). *Wildflower New York Charter School*. Retrieved March 13, 2025, from https://www.schools.nyc.gov/schools/X633

R-03ad - Proposal History

a. Applicant Information

Lead applicant Courtney Murphy is a certified teacher in New York State, in both Visual Arts and Students with Disabilities. For many years post graduation, Courtney spent time in Ballston Spa Central School district as a substitute teacher while she worked to earn her Master's degree in special education. Raised in the community where she now hopes to open a school, Courtney has always considered this place home, even during times when she temporarily lived elsewhere over the past 37 years. Now a parent to three children of her own, she and her husband who also attended Ballston Spa Schools are raising their children in the community they love so much. She is a former teacher and later assistant principal-turned stay at home mom. Her deep connection to the town is rooted in a lifetime of experiences and relationships within the community. Growing up, Courtney and her two siblings were actively involved in local programs, including Girl Scouts, programs at the Ballston Area Recreation Center and the Ballston Area Community Center, and local sports teams- all of which further strengthened their ties to the community. Courtney's background in education, combined with her personal connections to the area, provides her with a unique understanding of the local needs and culture. This strong connection will guide her in creating a school that serves and reflects the values of the community she knows so well.

b. Proposal History

Courtney Murphy, lead applicant, is a former teacher as well as parent who is now raising her children in Ballston Spa, New York. She recruited former colleagues who worked together at a Charter Middle School to assist in the creation of this application. Courtney worked as assistant principal, Trona was an instructional coach, and Tara was also an instructional coach then stepped back into the classroom to teach 6th grade English Language Arts. Each of these applicants has since left the school for other endeavors and roles elsewhere. Jessica Connor worked as the Director of Special Education (official title 'Scholar Support Coordinator') and still works there now, stepping back into the classroom as a special education teacher.

The application team was formed by this group of educators who had worked in an underperforming middle school plagued by instability, with five different principals over five years. In March of 2025 it was announced the school would have its 6th (interim) principal until another one was hired. This constant leadership turnover added to an already unstable environment that negatively impacted all students, particularly those in special education. Students who required special education services were continually denied the legal services they needed, and special education teachers were not treated as professionals, further exacerbating the challenges being faced both by students and staff. Despite Jessica's leadership in special education and constant advocacy to the leadership team as well as regional team

members, the needs of students with disabilities were still largely unaddressed- with excuses given rather than proactive solutions considered. When Courtney stepped back into the classroom as an assistant principal in the 2023-2024 school year in its entirety due to staff shortages, she was able to advocate not only as a leadership member but through the viewpoint of a teacher. Again, her advocacy fell short as staff shortages and scheduling conflicts were provided as excuses for why students were not being served. In this large, failing school, students were treated as numbers—simply an allocation of funding—where the focus was on test results and compliance (both physically demanding compliance as well as academic routine compliance) rather than on the individual needs and well-being of students. The lack of continuity in teaching, fragmented school culture, and disrupted relationships between staff and students contributed to poor outcomes, especially for the most vulnerable students within the school: students with disabilities. As a former special education teacher, and parent to a daughter with a disability, this was both professional and personally disheartening to Courtney.

As in many traditional charter schools, students found themselves in rigid, highly controlled environments where movement was restricted, their bodies were constantly policed, and strict behavioral expectations overshadowed meaningful engagement. The focus was on behavioral compliance rather than fostering academic curiosity, with little room for student autonomy or choice. Classrooms were arranged in neat forward facing rows, reinforcing a passive learning experience often dictated by the outdated "I do, we do, you do" model. Even after Covid-19 restrictions were lifted on classroom spacing and movement in the building, leadership kept students in their homerooms for the entirety of the school day outside of gym/lunch period- and had teachers rotate class to class, as behavior management not just within the classrooms but across the entirety of the school was an area of struggle. The lack of movement not only within the school but the classroom itself lead to increased fatigue and decreased focus/attention amongst students. Hands-on learning was rare, and project-based experiences, when they did occur, felt more like novelties than integral parts of the curriculum. With minimal cognitive engagement and few positive reinforcement techniques utilized by a range of mostly novice and/or teachers who were not certified, students were often disengaged, moving through a system designed for efficiency rather than deep, meaningful learning. Although the school had a clearly articulated set of values that were regularly recited by both staff and students, Courtney observed that these principles were not consistently reflected in daily practice. While teaching alongside classroom educators, she saw firsthand a disconnect between the school's stated mission and the actual priorities guiding day-to-day decisions and interactions. The values, though visible in rhetoric, were not actively lived out in the culture or operations of the school. Upon hearing this school would be growing into a high school in a large scale setting, Courtney initially felt hopeful for local students to have a choice to attend a different program than local district high schools. Courtney has always believed in the power of charter schools and their ability to provide options to families, spending her entire teaching career in charter schools intentionally because of this belief. However, the shift toward scale and expansion moved further away from the intimate, relationship-driven model she believed was essential for meaningful, student-centered learning, something Courtney was experiencing for her daughter at the time.

In contrast to the larger middle school she worked for, the lead applicant Courtney, whose daughter at the time attended a Montessori primary classroom from age 3-5, saw a vastly different approach. In the Montessori environment, students were treated as individuals, given the freedom to be themselves, and viewed as worthy of choice. The focus was on nurturing each child's unique potential, fostering independence, and supporting personal growth rather than just meeting standardized metrics. While Courtney's oldest daughter doesn't have a disability, she saw the profound influence individualized attention in a Montessori classroom had. She knew this focused attention could have a big impact on her middle child, who has a disability. The Montessori environment catered to both general education as well as students with disabilities. Her daughter's teachers had been co-teaching together for many years and grew to know her daughter across a three year span in the mixed age classroom. Courtney realized that small community rooted programs may be key to avoiding the aforementioned struggles of a larger school. This experience led the application team to envision a school model that prioritizes stability (for both staff and students), individualized attention, and a community-based environment. They recognized that leadership consistency and a unified vision of all stakeholders are crucial for student success, especially for students with disabilities. Courtney decided to begin researching the Montessori curriculum, learning more about Montessori pedagogy, and how it may be applied in various age groups. When Courtney began outreach to determine interest in supporting her vision of bringing a public Montessori school to her hometown, the application team members swiftly agreed to support. Drawing on their experiences, they sought to establish a school vision that fosters continuity, collaboration, and personalized support, ensuring that all students, particularly those with disabilities, are seen as individuals and given the education they deserve. By remaining intentionally small, in a micro-school setting, they could ensure that expanding and growth was not at the forefront of their mission. Individualized attention in a small school would be key.

During Courtney's most recent maternity leave, she partnered with The Wildflower Foundation and participated in a 10 week cohort to develop background research for the proposal. She was overwhelmingly supported by a network of other educational entrepreneurs and the Wildflower Schools Foundation in her hopes of creating a school where all students are supported and have room for choice. She decided to leave her job as an assistant principal and continue on the path towards opening a Wildflower charter school for her community. Later, the founding applicant members actively participated in Zoom sessions with Erin Quigley, Wildflower's Director of Charter Expansion, so that all applicants could learn about the Wildflower network, gaining valuable insights into its model and approach. Courtney, lead applicant, drafted weekly team emails to the rest of the applicant team, delegating various tasks within the proposal that aligned with each team member's expertise. As the proposal draft continued, all team members had access to a working draft with delegated sections, and committed to feedbacking each other in order of producing a worthy proposal. At the same time, they met weekly as an application team, either on Zoom or in person, to discuss their progress and collaboratively refine their vision. These regular meetings allowed the team to align their goals, share ideas, and ensure that they were moving forward with a clear, unified direction as they worked toward creating a school that would truly serve the Ballston Spa community.

While we are not replicating any school, we acknowledge that our school, if authorized, will join Wildflower New York Charter School in the Bronx as a sibling school to ours, as part of the same Wildflower Schools network. As such, while our proposed program serves a different student population, many elements of our model will align with the broader network's approach. Wildflower Schools all operate with the same 9 guiding principles, for example. Wildflower Schools are all community embedded micro-schools. Our application team has been in direct communication with Mario Benabe, lead applicant turned Teacher Leader in the Bronx, who has generously shared resources to support our development. Wildflower Schools operates as a decentralized network, fostering collaboration and open resource-sharing among its schools. This support has been instrumental in shaping our application. Given that all Wildflower Schools are guided by a shared mission and the nine core principles, certain aspects of our proposal may reflect similarities with Wildflower New York Charter School (curriculum, principles and beliefs, and our leadership model for example) while remaining uniquely tailored to our community's needs.

c. List of Founding Team Members

Name	Description
Courtney Murphy	Courtney Murphy is a lifelong learner, a passionate advocate for education, and a dedicated mother to three children- one of whom has a disability. She is deeply committed to creating opportunities and fostering accessibility for all, particularly through her work in disability advocacy and inclusion. Courtney has worked as a teacher, instructional coach, and later assistant principal across her 15+ years in education. Courtney believes in the power of education to transform lives and is driven to ensure that every child has the resources and support they need to thrive. As someone who values continuous growth and learning, she strives to create environments where all children, especially those with disabilities, can flourish and reach their fullest potential.
Jessica Connor	Jessica is a dedicated Special Education teacher with a passion for crafting and a deep commitment to helping students succeed. She has been working in education since 2015 and has been working with children since 2009. Throughout her career, she has held various roles, including preschool teacher, assistant director at a preschool and daycare, 6th and 7th-grade math teacher, 6th-grade science teacher, and Special Education coordinator and teacher. Jessica is a strong advocate for inclusion and believes that every student, regardless of ability, deserves to be fully integrated and supported in the classroom. She firmly believes that every student can learn in their own way, and she strives to create an inclusive environment where each child's unique strengths are celebrated. Her goal is to provide tailored support to help students reach their full potential while fostering

	a sense of belonging for all.
Trona Cenac Joseph	Trona has dedicated herself to the field of education since 2018, starting as a full-time high school teacher after completing her BA in Mathematics. Prior to that, she served as a teaching fellow while pursuing her degree. She began her teaching career as a high school Algebra 1 and Algebra 2 teacher, and her passion for education quickly led to broader leadership roles. Over the years, Trona has gained valuable experience as an instructional coach, lead lesson planner, and Dean of Curriculum and Instruction. Her commitment to growth and leadership has recently propelled her to the role of Director of Teaching and Learning, where she can continue to evolve as an educator and leader. Trona's overarching goal is to be part of an educational system where students feel supported, empowered, and challenged to reach their highest potential. Her work centers on fostering an environment that prioritizes student success while continuously improving teaching practices.
Tara Michel	Tara has been working in the educational system starting in 2005 with preschools for students with disabilities, the Langan Elementary school through the Center for Disability Services, through Teach For America's Organization, as well as public district schools and charters in Mississippi, Massachusetts, and New York. Tara has helped found two free public charter schools where over 90% of students receive free lunch and is dedicated to having all children have access to a strong education by utilizing DEIA initiatives and being an ally for marginalized individuals.

d. Withdrawn, Rejected, and Concurrent Proposals(SUNY and/or Other Authorizers)

This proposal has never been previously submitted and as such this is not applicable. Our lead applicant and founding team are not applying for a charter from any other charter entity. None of the lead applicants have ever had a charter school application granted by any charter authorizing entity in any state.

R-03e - Letters of Justification

No charter entity in any state has provided any formal documentation to explain a decision not to not move forward an application for a substantially similar school (resulting in an applicant withdrawal, or denial of the application), **therefore this is not applicable.**

Trona Cenac-Joseph

[redacted]

Career Objective

Adaptable professional with 4.5+ years of experience and a proven knowledge of classroom management, curriculum development, and instructional techniques. Aiming to leverage my skills to successfully fill the Dean of Curriculum and Instruction role at your company.

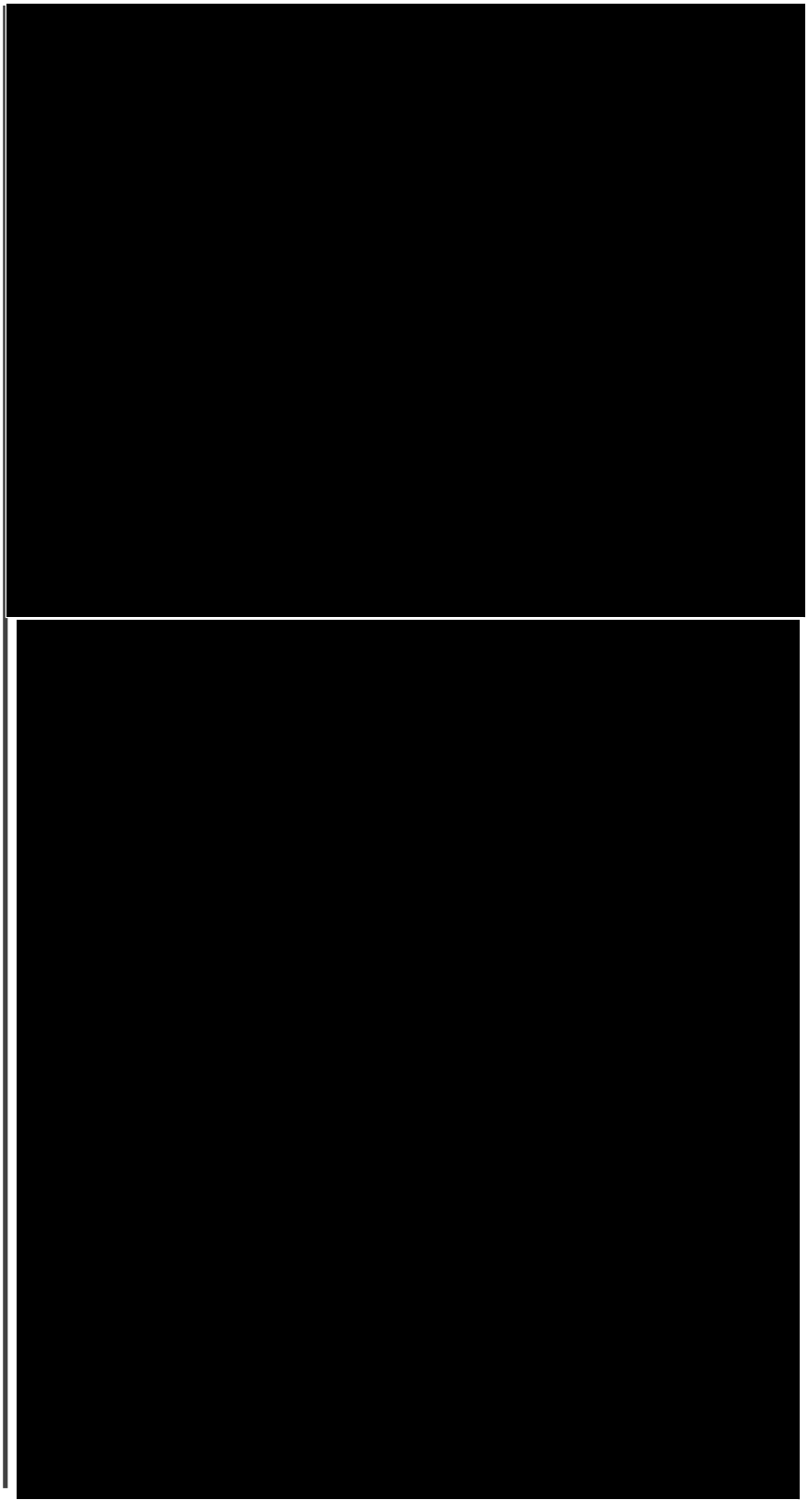
leadership Experience

[redacted]

INSTRUCTIONAL COACH

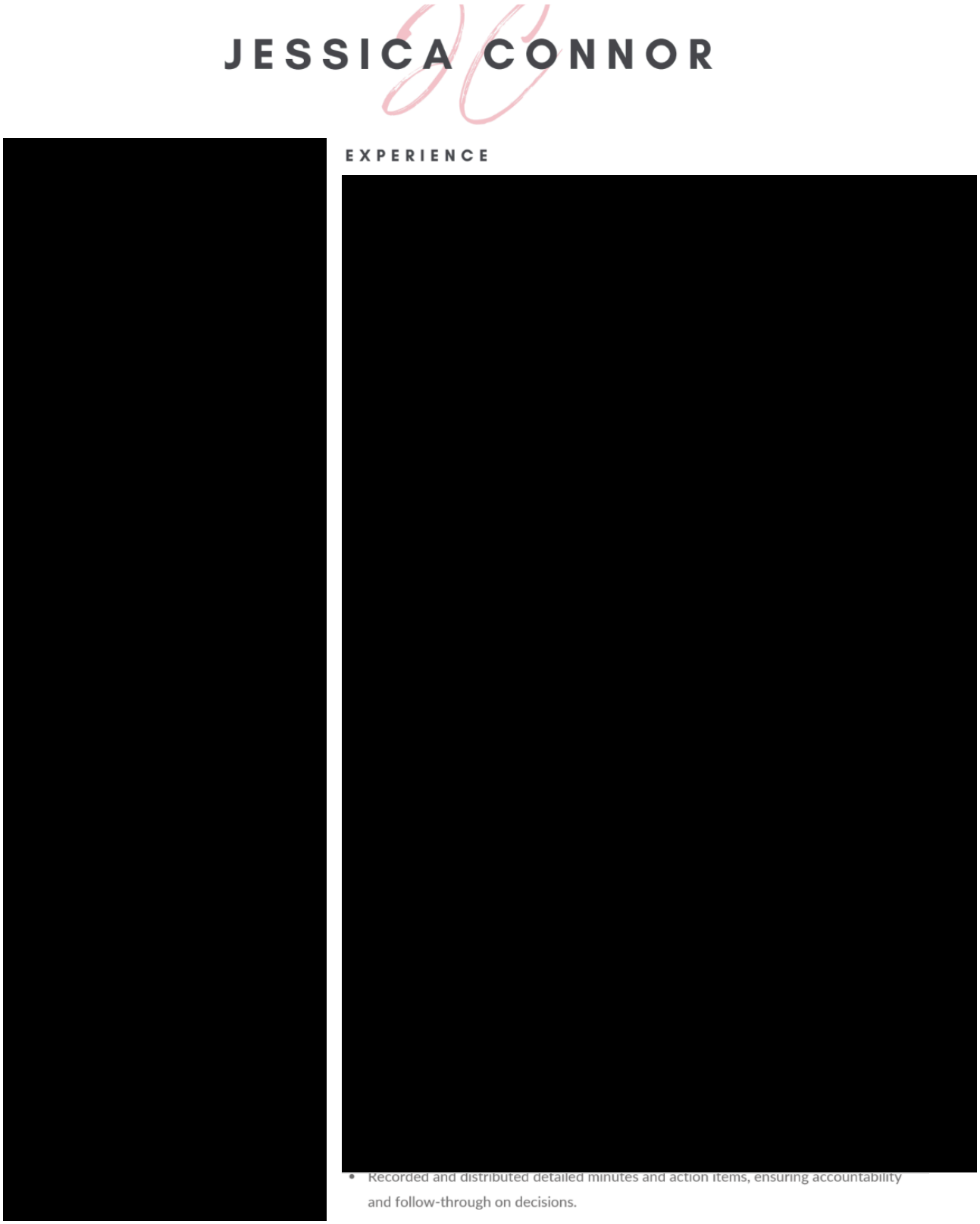
[redacted]

Trona Continued:



Trona Continued:

Jessica:



Response 24-51

JESSICA CONNOR

EXPERIENCE

[redacted]

Response 24-52

JESSICA CONNOR

EXPERIENCE

[redacted]

[redacted]

Tara Michel

[redacted]

EXPERIENCE

[redacted]

Courtney Murphy

NYS Certified Teacher

[redacted]

contact

[redacted]

EDUCATION

SKILLS

CERTIFICATIONS

[redacted]

professional experience

[redacted]

R-03g – Disciplinary Status of Affiliated Charter School(s)

This request is not applicable.

R-04abc – Community Outreach, Support, and Demand

a. Description and Analysis of Community Outreach and Engagement

Community Engagement and Outreach/Timely Notification of Intent

Our application team took steps to proactively develop a social media presence on both Facebook and Instagram, announcing our plan to open a Montessori micro-charter school in Fall 2026. Through these platforms, we actively spread awareness and encouraged engagement from community members, local organizations, and prospective families. We utilized the following strategies to raise awareness about our proposal:

- We also shared an interest form for local parents to express their interest in enrolling their children, with a final question dedicated to scheduling discovery interviews—ensuring that families had a clear avenue to provide input on the proposed school.
- Nearly all families opted in (stating yes) to our discovery interviews which were either phone interviews or back and forth email survey responses.
- Additionally, Courtney Murphy, the lead applicant, posted an announcement on LinkedIn, inviting individuals to apply for board membership, further expanding outreach efforts.
- Outside of social media presence, we actively posted physical flyers with our mission and vision throughout Ballston Spa and surrounding communities on community boards, coupled with a QR code that directed families to our interest form as a means to engage members who may not be on social media.
- Lastly, Courtney printed extra copies of an informational flyer to be passed around at Ballston Spa Public Libraries story time (of which Courtney's daughter and niece regularly attend). The woman who runs storytime offered to support Courtney's efforts by hanging a flyer at the libraries community board as well as pass along to interested families.
- Each family that completed an interest form (68 at the time of this application) received a follow up email with an opportunity to discuss (either through email or by phone) answers to discovery questions in which we asked for input on our mission/vision and goals for the school.
- Once our social media presence was established, we used this as a means to draft outgoing emails with our social media as reference in order to engage with local community organizations (Ballston Area Recreation Center, Ballston Spa Public Library, Ballston Area Community Center), local school options (local Montessori schools, local pre-k/UPK 4 schools), Ballston Spa Central School district representatives (Superintendent Duca), our local Mayor, Frank Rossi, the town supervisor for Malta (neighboring town) Ms. Cynthia Young, and other elected officials in New York such as Governor Kathy Hochul, Assemblywoman Mary Beth Walsh.

Meaningful Opportunities for Input

As community interest grew, we distributed our interest form to gather direct feedback from families regarding their educational priorities and needs. We also conducted discovery interviews with local families, allowing them to share insights on both the positive and negative aspects of their current school experiences. These phone and/or emailed back and forth interviews/questionnaires provided a platform for families to voice their expectations and desires for a future school. We also heard from a few local families who had questions around our special education programming, and expressed hesitation as they had negative experiences either directly in Ballston Spa Central School district or surrounding local schools. We used any negative feedback from former school experiences to cater our key design elements around community needs. We explicitly sought both positive, but especially negative feedback on any aspect of schooling in our area to develop a strong proposal for our own school. We were however pleasantly surprised to receive no negative push back on our proposal thus far.

- Our Facebook presence quickly gained traction, with 160 followers by its second week and 213 followers in just its second month, with many families expressing excitement about the possibility of the school.
- Similarly, our Instagram account grew to 127 followers by its second week, and 208 followers in its second month reflecting early engagement and interest from the community.
- Courtney also began joining local Facebook groups (518 parents, Upstate NY Moms, 518 Nannies, Babysitters, Day Cares, and Capital District, All Things Ballston Spa NY Stay at Home Moms, Capital District ASD/ SPECIAL NEEDS MOMS, Saratoga Area Parents of Special Needs to name a few) in order to gather interest as well as feedback from prospective families by making posts about the proposed school and linking our interest form for families to engage with us through email and later by phone (at their preference).
- Within 2 weeks we had received 40 interest forms from prospective families in our area.
- Within 2 months, as of April 1, 2025, we totalled 68 interest forms for an inaugural first class of 16 seats. We continue to receive at least one new form almost daily.

By engaging in meaningful conversations with families, we are able to ensure that the educational experience we create is deeply rooted in the community's values and aspirations, fostering a collaborative and responsive learning environment for all involved.

We have also actively engaged with local government and school district leadership to discuss our proposed Montessori micro-charter school and explore opportunities for collaboration. In early February and March of 2025, we conducted phone and email exchanges with our local Mayor Frank Rossi to introduce our vision and discuss potential impacts and benefits of our school within the community. Additionally, we held a Zoom session with the Town Supervisor of the neighboring district to further expand dialogue on how our school model could serve families in the broader area. We also exchanged emails with the

Superintendent of Ballston Spa Central School District (BSCSD) to provide transparency about our proposal and explore ways we could align with existing district efforts.

As we move forward in the application process, we remain committed to strengthening these partnerships. We are currently seeking opportunities to present the Montessori curriculum approach to the BSCSD Board of Education and the Village Board to further spread awareness about our proposed school model and its benefits for students. These conversations, which most recently continued in February and March, will continue throughout our application phase as we engage with local stakeholders to ensure our school is developed in collaboration with the community. Thus far, we have received no stark opposition to our proposed school- instead, the Mayor of Ballston Spa is currently doing his due diligence to thoughtfully evaluate the proposed school's potential financial impact on BSCSD's budget and broader community resources. The Town Supervisor in Malta said that though there was no opposition for our school, the board wasn't prepared to draft a letter of support without further information. They felt they did not have enough information to make a full decision, and as such, our community partnerships will continue so that all stakeholders are fully aware of our schools intentions.

Thoughtful Process for Considering Community Feedback

Through ongoing community engagement, we actively sought input on how to shape the educational program to best serve students' needs. Courtney, the lead applicant, directly reached out to local organizations, businesses, prospective board members, and families to gather further perspectives and build partnerships. The discovery interviews allowed families to share specific feedback on their current school options, and our proposed model, highlighting what they appreciated and what they felt was lacking (if anything). This qualitative data has been instrumental in refining our educational vision and ensuring that the proposed school aligns with the needs and expectations of the families it aims to serve.

To start, many families expressed wanting 'something different,' and named that our proposed mission/vision aligned with that 'something different' they had been looking for. One family noted that they had looked at many local daycares and preschools stating, " I have and a lot of them are the same. It seems for smaller children there are really two options: a daycare or a preschool that has vague descriptions and honestly sounds just like another daycare." They expressed wanting a school that is "accepting children as they come and not expecting a stream-lined version of them. I think all kids have their own unique needs and yet go to school and are expected to all show up the same." Our social media posts regarding our holistic approach and truly making sure each child feels 'seen' resonated with many families. Again, this confirmed we would make steps to start not just as a kindergarten program, but, once approved for a charter, work with BSCSD to extend our services and aim to include a preschool option. This reaffirmed our choice of a Montessori curriculum, as so many families named that they felt all schools were 'the same' in our area. We believe that 'something different' may be an innovative approach to learning environments of which Montessori lends itself so nicely to: mixed aged classrooms, child lead learning, hands on materials, and catering to each child's individual needs.

As our school emphasizes inclusion and many conversations involving parents of students with disabilities, there was a clear through line expressed for innovative approaches to learning, as well as a need for more play based and hands-on learning. Families expressed that they cared much less about academics in early elementary programs and overall sought spaces where the whole child was of focus, ensuring social/emotional well being. Several phone calls occurred where families stated that their experience in BSCSD and local surrounding schools regarding their child with an IEP was not positive. We took great care in hearing more about why specifically their experience felt negative- with one family naming their child as being 'dismissed, not seen' as early as day one of school. Teachers were ill-prepared to support her autistic son, and she felt disheartened that a school preaching inclusivity had this conversation on the first day of school without getting to truly know him and his needs. Another family claimed that her son wasn't provided the care and support that his IEP mandated, and that until she named she would get legal teams involved she wasn't being heard or taken seriously. We engaged in extensive conversations with families to better understand their past challenges, particularly around inclusion, with the goal of proactively designing a school model that authentically reflects its stated values and commitments.

These conversations helped our application team arrive at the following:

- Rather than solely one Montessori teacher in the classroom, our staffing model includes two adults in the classroom (high teacher-to-student ratio).
- We incorporated a plan for ongoing professional development in a range of areas, but especially in special education supports and social-emotional learning.
- We added an additional SEL program (MindUp) to support emotional regulation and mindfulness.
- Our behavior management approach utilizes Conscious Discipline, reinforcing a sense of belonging, safety, and connection for all students—especially those with disabilities.

The Wildflower Foundation offers support to open both independent and charter schools. When determining what steps we would take in our plans to open a school, we soon realized that the only choice we had would be to provide a charter school to our community. Nearly all parents spoken to also expressed interest in a free and/or affordable Montessori school being a main factor in how they became interested. One family in our discovery questionnaire expressed shock over how it would even be possible to provide a tuition free Montessori program. She said she had considered Montessori, but it was financially not within reach for her family. She stated, "One thing when I first heard of the school is HOW can Montessori be inclusive. I have done all the research and found these schools hard to access both financially & in location. So the shock (and excitement) came when I saw your school. Largely inclusivity is all of the Saratoga population having the option to send their children here. How that can happen I don't know but that's inclusive- indiscriminate of race, sex, financial means, location." Many families expressed excitement over this innovative model that would now be accessible financially to their family. This reaffirmed our decision to partner with WSF in opening a charter school vs. another independent Montessori school. If we are to maintain our

inclusive model, that includes providing inclusivity for those who don't have the financial means to afford authentic Montessori in our area.

We engaged in a community-driven process to ensure our school's curriculum reflects the needs of both general education and diverse learners. Through discovery interviews and ongoing outreach, families emphasized the importance of a hands-on, student-centered learning approach, which reaffirmed our commitment to the Montessori model. Several families shared concerns about their children being expected to sit for extended periods during the school day and engaging primarily in worksheet-based tasks, with limited opportunities for hands-on, project-based learning. They expressed a strong desire for a more dynamic and interactive classroom environment that supports movement, creativity, and experiential learning. Even when families were initially unfamiliar with Montessori pedagogy, many shared that our social media content helped them better understand the approach and recognize its alignment with what they want for their children. We are committed to continuing these outreach efforts through in-person engagement, including presentations at local Board of Education meetings, Village Board sessions, and other community forums to further deepen public understanding and dialogue. We hope to continue these efforts through the spring.

Courtney Murphy actively sought input from her diverse application team, which consists of educators with experience across various grade levels, locations, and teaching capacities. By drawing on their collective expertise, she ensured the school's vision and approach would be well-rounded and grounded in a variety of perspectives. Courtney's ties to her community also allowed her to reach out to current educators in a range of grade levels, many of whom are also parents, to ensure there was a throughline of local input on future programming.

Additionally, she consulted with local Montessori credentialed classroom teachers, some of whom taught her daughter in a primary classroom, to review the proposed curriculum, valuing their insights as Montessorians to ensure that it aligned with Montessori principles and best practices. Two directors from local Montessori independent schools provided support in the proposed curriculum, confirming all information was factually correct in nature. Lastly, she reached out to Mario Benabe, lead applicant turned Teacher Leader at Wildflower New York Charter School, to determine if any resources they may have would support us in the curriculum development of our application. This collaborative approach reflects Courtney's commitment to building a school that is both inclusive and academically rigorous, with input from seasoned professionals at every step of the process.

Continued Community Engagement Plan for Montessori Micro-Charter in Ballston Spa

Goal: Build awareness, engage families, and ensure inclusive outreach to diverse learners, including students with disabilities.

January/February 2025

Overarching Aim: Introduce the school vision and begin community engagement.

Key Outcomes:

- Launch and actively manage Facebook, Instagram, and LinkedIn to share our mission, engage families, and build excitement.
- Recruit a board that is aligned with our mission/vision and can support outreach moving forward.
- Post physical flyers in community boards around Ballston Spa.
- Plan upcoming monthly in-person events with the application team/board for prospective families and community members to provide information, answer questions, and gather feedback.
- Develop and distribute an interest form for families to express interest in the school electronically.
- Begin outreach to local organizations and prominent community members, including those supporting students with disabilities:
    - Ballston Area Recreation Center
    - Ballston Area Community Center
    - Ballston Spa Public Library
    - Mayor Frank Rossi
    - Ballston Spa Central School District Board of Education
    - Saratoga County Early Intervention Program
    - AIM Services, Inc.
    - Parent Network of the Capital Region
    - Inclusive Saratoga
    - Elementary PTA

March/April 2025

Overarching Aim: Expand reach and establish direct community connections.

Key Outcomes:

- Host first virtual board meeting with Wildflower Network representative and board members as an introduction to the network principles/beliefs
- Plan a virtual informational zoom session with application team and board members to engage families and share about our mission/vision/goals. Invite families to also participate in this as a larger ‘discovery interview’ in which we gather further feedback on said mission/vision/goals.
- Locate space to host the first monthly in-person event for families slated to begin in April.
- Table at local events (farmers' markets, community fairs, library events) to engage families and distribute physical interest (intent to enroll) forms and/or QR codes.

- Continue to conduct one-on-one follow-ups with families who completed the interest form.
- Strengthen partnerships with local disability advocacy organizations and special education service providers.
- Plan/advertise a future Montessori in person workshop for prospective/interested families
- Continue with outreach to independent Montessori school options throughout upstate New York- working to forge partnerships in bringing Montessori to the public sector and seeking letters of support:
    - Bluebird Montessori
    - Castle Island Montessori
    - Little Ones Montessori
    - Riverrun Montessori
    - One Family Montessori
    - Morning Star Montessori
    - Our World Montessori
    - Roots and Wings Montessori

May/June 2025

Overarching Aim: Define community values and establish trust.

Key Outcomes:

- Host our first informational zoom session for prospective families
- Host a free in person Montessori workshop for parents, focusing on how the Montessori method supports diverse learners.
- Host a design team meeting with board members and interested family volunteers to:
    - Review feedback from families and refine the school's vision.
    - Align on core Montessori values and how they translate to an inclusive learning environment- specifically partner with Inclusive Saratoga on design elements of the physical space and materials chosen.
    - Ensure we are meeting the needs of students with IEPs and diverse learning styles.
- Train volunteers/board members/application team members to table at events and engage with the community- both Ballston Spa and local communities in surrounding areas (Milton, Malta, Saratoga, for example).

July/August 2025

Overarching Aim: Strengthen outreach and reinforce partnerships.

Key Outcomes:

- Continue hosting at least 1 monthly in-person and/or zoom event for families and

prospective students to reinforce partnerships.
- Deepen relationships with community organizations, particularly those working with underserved populations and students with disabilities- establish ways in which community organizations may concretely join us in our mission (for example, monthly visits to our school from a BARC representative- tri-annual visits from Inclusive Saratoga around ADA compliance and/or insight on our space/materials/classroom organization).
- Feature family testimonials and student stories on social media to highlight community interest and excitement.
- Increase digital engagement through live Q&A sessions, prospective parent interviews, and Montessori education highlights. Emphasize community driven collaboration with interviews, ensuring we are living our vision of co-creating our micro-school with parents.

September/October 2025

Overarching Aim: Solidify community connections and increase enrollment interest.

Key Outcomes:

- Continue at least 1 monthly in-person and/or zoom event, including school model presentations and Q&A sessions.
- Actively solicit intent-to-enroll forms at events and online. These forms may differ from our initial interest forms in that they are isolated to families whose children would be of age to enroll in our first primary classroom opening Fall 2026.
- Personally reach out to families who have expressed interest, providing clear information on the enrollment process.
- Host a meeting with the design team to again receive feedback on plans and vision thus far.
- Continue targeted outreach to families of students with disabilities to ensure inclusivity.

November/December 2025

Overarching Aim: Ensure families are fully informed and prepared for enrollment.

Key Outcomes:

- Host final in-person engagement event describing steps for enrollment (January-March).
- Provide families with detailed next steps for enrollment and school opening updates (enrollment period January-March; school opening September 2026)
- Share a comprehensive FAQ guide covering Montessori philosophy, curriculum, financial accessibility, and support for diverse learners.
- Celebrate community involvement with a final event recognizing partners, families, and supporters- perhaps during a winter break wherein some families may be more flexible on timing.

January – February 2026

Overarching Aim: Process applications, conduct outreach to maximize enrollment, and prepare for the lottery if needed.
Key Outcomes:

- Continue accepting applications until the enrollment deadline.
- Conduct follow-up outreach to families who have shown interest but have not yet applied.
- Provide individualized support through phone calls or in person visits to families with questions about the application process.
- Host virtual Q&A sessions to address last-minute inquiries.
- Begin preliminary planning for potential lottery based on projected enrollment numbers.

March – April 2026

Overarching Aim: Finalize enrollment through a fair and transparent lottery process.
Key Outcomes:

- If applications exceed available seats, hold a public lottery (in compliance with state charter regulations).
- Notify families of their admission status (accepted or waitlisted).
- Provide accepted families with next steps, including paperwork submission deadlines.
- Offer waitlisted families updates on their status and potential movement.
- Organize a welcome event for admitted families to build community and excitement likely in April. Pending weather would be nice to have at a local park (Wiswall park an option).

May – June 2026

Overarching Aim: Confirm enrollment and prepare families for the transition.
Key Outcomes:

- Ensure all accepted families submit required enrollment documents (proof of residency, immunizations, emergency contacts, etc.).
- Begin connecting families with school resources, such as transportation options and support services.
- Introduce families to the school team through social media posts as well as emails- introducing the teacher leaders as well as any other support staff (teachers assistant, executive director, etc).
- Host new family orientation sessions, focusing on Montessori philosophy, daily routines, and what to expect (June).
- Share summer engagement opportunities (reading lists, introductory activities, meet-ups) through weekly emails in June.

July – August 2026

Overarching Aim: Provide final onboarding support and ensure a smooth transition for students and families.
Key Outcomes:

- Conduct home visits or personal check-ins for families needing additional support, especially those whose children have individualized education plans.
- Host an open house to introduce students to their learning environment and teacher leaders. Include families in this visit and discuss 'phase in' plans for the first few days of school (students will come in shifts to 'ease in' to the new classroom environment, increasing in time and amount of students in one space until the full class joins on the final day of phase in).
- Ensure all staff are prepared with student information, accommodations, and individual learning plans.

September 2026 – School Opening

Overarching Aim: Create a welcoming and supportive first day of school experience.
Key Outcomes:

- Greet families and students with a warm and inclusive start.
- Ensure a structured, supportive onboarding period for students to adjust to the prepared Montessori environment.
- Maintain ongoing communication with families to answer questions and provide updates through a weekly family email.

From January 2025 to September of 2026 (and beyond) we will provide regular social media updates throughout our entire engagement plan to keep families, supporters, and community members informed every step of the way. From key enrollment dates and event reminders to behind-the-scenes glimpses of our school's progress, our posts will ensure transparency and excitement as we move toward opening.

Soliciting Community Input

Community engagement has been central to our planning from the start. Courtney Murphy has led efforts to inform the BSCSD community about the prospective school while gathering and incorporating feedback. In addition to local families, we have engaged residents, business owners and organizations through phone calls, emails, social media outreach, surveys, as well as calls/email exchanges with elected officials, and other Montessori schools in the capital region. Our Facebook and Instagram presence has further facilitated communication and feedback from interested parents. Gathering input has been a priority in every interaction—whether through meetings, presentations, conversations, or surveys—ensuring our school design reflects the needs and perspectives of the community.

Once families joined either of the social media pages (Facebook or Instagram) a team member would reach out through the social media account suggesting they fill out an interest form if they were a prospective family with children between the ages of 3-5 of Fall 2026 (our demographic). We shared our mission and vision as well as brief questionnaires (we refer to them as 'discovery questions') to families who expressed they were interested in collaborating further with us. Families either engaged in phone conversations, texts, social media messages, or email.

Family conversations have highlighted a strong demand for alternative educational options in Ballston Spa. Many parents have expressed a desire for a less traditional, more innovative approach to early childhood education, emphasizing the need for hands-on, student-centered learning environments. As one family put it they 'didn't want their child sitting at a desk all day.' Additionally, families navigating the special education process in local districts have shared challenges in accessing adequate support and resources for their children. They expressed the desire to have a smaller class setting where a child can get further individualized attention. These discussions reinforce the need for a flexible, inclusive educational model that meets the diverse needs of all learners, providing both academic excellence and individualized support.

Nature of Feedback Received:

As mentioned prior, we took any feedback from families and proactively began drafting further plans regarding our staffing, professional development, and behavior management plans. Through our engagement with families, several key concerns emerged, directly shaping our proposal. Many families emphasized the need for additional educational options in BSCSD, as long waitlists created barriers to access. When unable to secure a UPK 4 seat, families often faced significant financial strain, resorting to independent or religious-affiliated schools. Other families expressed forgoing pre-k programs overall when they did not get a placement in UPK 4, as UPK 4 is a tuition free option that would allow their families the financial freedom to both send their child to pre school and continue living within their means. With this being an ongoing trend, we emailed SUNY CSI regarding next steps after we receive charter approval, were advised to include our plans for UPK in our narratives, and also contacted BSCSD Superintendent Duca regarding providing another option for universal pre-k.

Parents also expressed a desire for learning environments that honor children's natural development, noting concerns about students being reprimanded for age-appropriate movement and play in other settings. Too often in our discussions, a common trend families expressed was that of children being expected to sit and listen to staff for lengthy periods of time, inability to access outdoor spaces or have 'free time', and a lack of awareness from staff and/or lack of being proactive around social emotional well being. Additionally, families of children with special needs voiced the importance of having a dedicated/trained staff, as well as the option of multiple teachers in the classroom, specifically educators with deep expertise in diverse needs and disabilities. One family also expressed they viewed our social media pages and weren't sure if their daughter would 'be able to get her services at this type of school.' We

assured her that as a public charter micro-school, we would be creating an inclusive setting and of course be servicing children with disabilities. Her comments helped us craft social media posts as well as our informational slide deck for families to be more clear that we will in fact be not only providing services, but purposefully utilizing a weighted lottery for students with disabilities.

Informed by meaningful conversations with families, we have prioritized staffing each classroom with a Montessori-trained lead teacher and a teaching assistant to foster a nurturing, inclusive environment that reflects the needs identified by our community. We know that many families may experience nervousness about sending their child to a new school, especially if their child has a disability. Children with disabilities require specific supports per their IEP, and enrolling your student in a brand new school could seem overwhelming. These concerns were eased upon learning of our commitment to maintaining a high teacher-to-student ratio and implementing a co-taught model that ensures more individualized support. While our current plan includes one lead teacher and one teaching assistant per classroom, we may consider the potential transition to a two-teacher model in future years. Any adjustments to our staffing structure will be driven by student-centered priorities and fiscal responsibility. We are committed to maintaining open and transparent communication with SUNY regarding any such shifts to ensure continued alignment with our charter commitments and accountability standards.

We also took significant care in crafting a proposal that places emphasis on inclusion and supporting the needs of diverse learners. Much of the information received from families solidified our choices in an authentic Montessori program in a co-taught classroom setting. The throughline of less 'traditional' education was clear- and only solidified our choice in Montessori curriculum. Traditional classrooms typically follow a teacher-directed model, where students spend much of their day seated at desks, completing paper-based tasks and following a structured lesson plan led by the teacher. Learning is often uniform, with the same material delivered to the entire class at the same pace, leaving little room for individual exploration. In contrast, Montessori classrooms embrace movement, choice, and independence. Students are free to move around the classroom, work in different spaces, and engage with hands-on materials that make abstract concepts more concrete. Instead of being confined to a desk, children choose activities that align with their interests and developmental needs, allowing for self-paced learning. Teachers act as guides, observing and supporting students rather than directing every moment of instruction. This approach fosters curiosity, engagement, and a deeper understanding of concepts through active exploration rather than passive instruction. To ensure our outreach was inclusive and representative of the broader community, we utilized multiple engagement strategies. In addition to direct outreach through phone calls, emails, and surveys, we actively joined local Facebook groups, including those specifically for parents of students with disabilities. This allowed us to connect directly with a diverse range of families, hear their concerns, and incorporate their perspectives into our planning. By engaging with both general parent groups and those focused on special education, we ensured that our proposal reflects the varied needs of the entire community and aligned with our specific inclusive model.

Outreach efforts and engagement

- To assess community interest and increase awareness of WUNYCS, dedicated social media accounts were established on Instagram and Facebook, with consistent posting every 2-3 days to share information about our program and engage prospective families. We utilized imagery from established Wildflower Schools to remain authentic in our engagement by showing families other schools within our network.
- Active participation in local community groups on Facebook, including parenting groups, mom groups, and disability advocacy groups, allowed for targeted outreach. Announcements about the school, along with an interest form, were shared to encourage community input and collaboration in the school's design.
- Flyers were strategically placed on community boards and the public library in Ballston Spa, Milton, and Malta, NY, reaching families in surrounding areas. These are the local towns that makeup Ballston Spa Central School District. Each flyer featured a QR code linking directly to the interest form for ease of access.
- All individuals who interacted with social media posts, sent direct messages, or submitted the interest form received personalized follow-ups via email. These emails included optional discovery questions, allowing families to provide feedback on the school's mission, vision, and goals. Additional outreach efforts—including text messages, phone calls, and direct social media messaging—were conducted to further gauge family interest and encourage formal submissions of the interest form for potential enrollment in Fall 2026.

b. Description and Analysis of Community Support

We have received positive support from prospective parents, community members, and local organizations, all emphasizing the need for an accessible Montessori program in our area. Currently, existing Montessori options are limited and largely located in areas outside our village, on average a 30 minute commute, leaving families with few viable choices. The one sole Montessori school within close distance to Ballston Spa is also independent and inaccessible financially to many families. 100% of Montessori schools in upstate New York are private.

Parents are especially excited about a tuition-free public Montessori school, citing long waitlists and financial barriers in private programs. Civic organizations and educational advocates have also voiced strong support, recognizing Montessori's benefits in fostering independent, engaged learners. Lead applicant Courtney has had several phone calls with directors in local community groups and thus far all have expressed excitement and interest in future partnerships between their organizations and our school. We received 68 interest forms from prospective families for our initial classroom of 16 students, as well as several letters of support from parents and community organizations alike. Our letters of support range from interested families to our Assemblywoman Mary Beth Walsh who supports our village which is in the 112th district in New York.

The depth of support for WUNYCS has been overwhelmingly positive, with strong engagement from prospective families, educators, and community leaders. One of the most encouraging signs of sustained interest has been the organic way families have learned about our school, as many who filled out interest forms cited hearing about us from a friend, demonstrating a growing word-of-mouth network that will continue to build momentum.

Our backing is not only broad but diverse, with support coming from parents, teachers, and local community program directors who recognize the need for expanded educational options in our area. Two local Montessori school directors have also provided letters of support, reinforcing the notion that Montessori is a pedagogy worth sharing far and wide, not seeing us as competition but as a means to bring Montessori to the public sector. Their support speaks volumes to the community support we've received thus far. Additionally, Assemblywoman Mary Beth Walsh's support lends institutional credibility, reinforcing the importance of offering a tuition-free Montessori option to families in our community.

The sustainability of this support is evident in the enthusiasm we've seen from families. Within just the first two months of posting our interest form, 68 families expressed interest in enrollment, and some have even stated that while their child is not yet school-aged, they plan to enroll in the future of our program. While our social media outreach targeted our first class of ages 3-5, several families reached out regarding expansion and requesting if we would serve higher grades in the future. 2 local parents with Montessori teaching experience also recently reached out to determine when we would be hiring. This continued demand highlights a long-term need for our program, ensuring WUNYCS will be a valuable and lasting addition to the community.

While we remain open to all feedback, we have encountered no significant clear opposition to our goal of being approved for a charter. Conversations with stakeholders that expressed any hesitation have instead focused on an appropriate location/facility and how best to implement the model to meet community needs, given Ballston Spa is currently rezoning. Zoning conversations with the village board (with community input) are slated to begin April 3, and we will be involved as a team to determine appropriate school zones and/or special permits required in order to operate in locations that fit our communities interests/needs. We will continue working with local leaders, elected officials, and families to shape the school's development. In addition to wonderings around location and facilities, of which our Mayor has been helpful in discussing zoning goings on, he also has expressed initial hesitation around the financial aspect of bringing a charter to our small community- and what it could do to our school districts budget.

In talks with the Mayor of the village of Ballston Spa, we had several email exchanges regarding our proposal and school design, to which hesitation was expressed in regards to drafting a letter of support- but no clear and direct opposition to the idea. The Mayor's response after discussion with our district superintendent is provided here for reference:

Courtney -

Thank you for taking the time to introduce us to the concept of the Micro-Classroom Montessori School you're proposing opening in our area. I love your passion behind helping educate our area children, which I know is shared by so many teachers and administrators in our existing schools in and around the Village.

I know you had hoped for a letter of support from me, as Mayor of the Village of Ballston Spa, but after several internal discussions and after speaking with Superintendent Duca of the Ballston Spa Central School District, we remain concerned about the message it would send to the area currently. As you probably know, due to a shrinkage in bed numbers of School District students, the BSCSD's budget has been cut in a way that has led to major cuts of staffing — and further reductions in bed counts could continue those issues. For as much as your school might be a job creator, it would likely lead to deeper cuts in the School District, adversely affecting Village residents that work at the various schools. As such, that's the tough balance here. In addition, the BSCSD contributes toward the Village's Public Library — funding that is crucial to keep those operations alive every year. A reduction in bed count could also adversely affect the amount we receive annually, forcing us to raise property taxes more than what we already are proposing.

On a brighter note, though, we do see some opportunities for a balance to be struck in the education system locally, with the over 500 residential units at Mill Town Centre on the horizon (which will be part of the BSCSD), and with potential opportunities with our new zoning code for the defunct Angelica and Maplewood Manor sites to be redeveloped as mixed-use or multi-family style properties. Those represent terrific opportunities, if they come to fruition, for growth that everyone can benefit from, including your endeavor.

In summary, our Board of Trustees is generally supportive of your end goals, but I cannot write an explicit letter of support when there are legitimate concerns about the potential negative effects your school could have in the near term on a School District we rely on locally. As Dr. Duca stated to both you and me, he is happy to work with you with UPK opportunities down the line if you do progress with your school — and similarly, if you get the school off the ground inside the Village, we will of course embrace your passion and would support everyone affiliated with it like we do with every other school or business in our community. Please keep us posted on your status as things develop, and I'm always happy to provide thoughts on any issues you might encounter along the way.

Again, we wish you nothing but the best in your journey to make this school a reality — it reflects a group of folks with a true passion in the betterment of youth that impressed me from the first day we spoke.

- Frank

Mayor Frank S. Rossi, II

Our team wanted to ensure Mayor Rossi was aware of our budget proposals, and as such followed up with the email listed below. We used rough estimates to provide ease of numerical understandings (20 students at $13-$14,000 per student). We will continue these conversations with our finalized budget as time moves forward and we continue to engage with various boards to present further detailed information about our school:

Mayor Rossi,

Thank you for taking the time to discuss our Montessori micro-school proposal both through phone calls and emails and for sharing your perspective on the potential impact on Ballston Spa Central School District (BSCSD) and the Village. I appreciate the opportunity to address concerns and reinforce our commitment to collaboration as we move forward in the application process.

I understand the concerns surrounding enrollment shifts and budget implications. We took deep care in our financial budgeting to ensure that we add to the educational landscape without becoming a detriment to the already great program BSCSD has to offer in our local elementary schools- the schools my husband and I moved back to Ballston Spa to send our first grader to (who is enrolled at Wood Road, right next to where I went- Milton Terrace!). By creating a micro-school model, based on our projections, the financial impact on BSCSD would be negligible given that per-pupil funding is estimated between $13,000 and $14,000 for charter tuition in BSCSD. In our first year, maintaining our goal of creating a micro-school with 20 students enrolled, the impact would be approximately 0.24% of BSCSD's $107.18 million budget (based on the budget for the 2024-2025 school year). At full enrollment (120 students), this would represent approximately 1.46% of the district's total budget (again only based on this year's budget- subject to change year to year). Being a charter school, not all students would necessarily come from BSCSD, minimizing our impact as well. With 70 current interest forms and 20 letters of support for our inaugural class of 20 seats, we predict we'll need to hold a lottery process for enrollment if/when SUNY was to approve us. Introducing the only tuition-free Montessori program in not just the capital region but all of upstate New York would likely attract families from surrounding districts, mitigating concerns about reducing BSCSD's student population.

Beyond enrollment and funding, in our micro-school staffing plan our goal would be to hire two teachers per classroom, with a projected total staff in year 5 (full build out) of 12 teachers, and 6 teachers assistants (if we maintain our co-taught model), adding additional employment opportunities within our village. I appreciate Superintendent Duca's willingness to explore potential UPK partnerships in the future, and we welcome further discussions on how we can work alongside BSCSD rather than in competition with it as UPK waitlists were a point of concern with nearly all families we've spoken to. We hope to provide this unique micro-school model for all interested families pre k-6th grade, specifically for families of students with disabilities. We will utilize set-asides in our enrollment for up to 20% of our classroom makeups for this purpose. While BSCSD schools are a space I spent many years subbing in while getting my Masters-I saw first hand the care many teachers put into their programs for students with disabilities. However, the schools themselves are quite large in terms of enrollment size- and our program offers a unique alternate choice for families who may want a smaller setting.

We recognize the importance of open communication and transparency, and we will continue to engage with local leaders, community organizations, and district officials throughout the application process. Our goal remains to collaborate, share best practices, and serve as a resource for families while supporting local initiatives, particularly in special education and experiential learning. Additionally, in the future we would love the opportunity to present Montessori's curriculum approach to both BSCSD's Board of Education and the Village Board to further clarify how our educational philosophy aligns with community and district wants and needs- to continue our goal of spreading our curriculum model to local elected officials, boards, and community members alike.

Thank you again for the well wishes, as well as the thoughtful consideration of our school. Our team appreciates your time and engagement, and we look forward to staying in touch.

Best,
Courtney Murphy

While Mayor Rossi has not expressed direct opposition to our proposal, he has understandably emphasized the importance of the district budget and the projected programmatic and financial impact of our school on BSCSD. We recognize and respect these concerns, which is why we have taken great care in designing our model as a micro-school—intentionally small in scale to ensure that we add to the educational landscape without creating undue financial strain on the district. Our financial projections indicate that the impact on BSCSD's budget would be negligible. Furthermore, as a charter school, our enrollment is not limited to BSCSD students alone, meaning that some families will come from surrounding districts, further mitigating local enrollment shifts. Our micro-school model allows us to provide a highly specialized, inclusive learning environment that serves as an alternative option for families, particularly those of students with disabilities, without disrupting the success of existing public schools in the district.

c. Description and Analysis of Student Demand

Our school aims to provide a high-quality, tuition-free Montessori education to meet the needs of families in Ballston Spa and the surrounding community. With an initial enrollment target of 16 students, we have gathered substantial evidence demonstrating the demand for our program, including preschool and elementary enrollment trends, waitlist data, and shifting demographic patterns in the Ballston Spa Central School District (BSCSD).

Our community engagement efforts have demonstrated strong family interest and demand for our tuition-free Montessori micro-school. Through social media interactions, we have seen enthusiastic participation from local families, with many engaging in discussions, asking questions, and sharing excitement about the possibility of a new tuition free public Montessori option in Ballston Spa. This interest has translated into tangible action, as 68 local families have already completed our interest form within the first 2 months of sharing them in

local social media groups for parents, expressing their desire to enroll their children in our school. 57 of these proposed families will have children in the Fall of 2026 that fall within our first mixed age grade band (ages 3-5)- the rest are below the age of 3 or above the age of 5, but families still completed the form expressing interest as their children age into our program or as we expand.

Beyond completing interest forms, several families have gone a step further by committing to writing letters of support, articulating why they believe this school is needed in our community. Their willingness to advocate for our proposal not only underscores the demand for alternative, high-quality early education options but also provides compelling evidence that families with age-appropriate children are actively seeking an inclusive, student-centered, and hands-on learning environment. This growing engagement signals a strong foundation of community support, reinforcing our mission to expand educational opportunities and meet the diverse needs of local families.

BSCSD continues to see strong enrollment in its early childhood programs, with significant participation in Universal Pre-Kindergarten (UPK) offerings. However, while the district provides UPK, options are limited, and families frequently face challenges securing a seat due to demand exceeding available placements. As of recent enrollment cycles, local UPK programs have had to use a lottery system, placing numerous families on waiting lists. For example, Little Achievers, one of the district's contracted UPK providers, reported a waitlist of 45 families for the three year old seats available in as early as February (for Fall 2025). This demand underscores the need for additional early childhood education options in the region, particularly ones offering an innovative approach such as Montessori. Beyond UPK, enrollment trends in BSCSD elementary schools reflect steady demand, with approximately 3,800 students across the district's K-12 programs. While Ballston Spa's public schools maintain strong academic programs, they follow a traditional instructional model that does not provide the individualized, multi-age, student-driven learning approach that Montessori offers. The lack of a tuition-free Montessori option in the region means families who desire this educational model currently have no access unless they can afford private school tuition.

The absence of a tuition-free public Montessori school outside of New York City further justifies the need for WUNYCS. Our school will not only meet the needs of families seeking Montessori education but will also increase access to high-quality early childhood education for economically disadvantaged students, who make up nearly 36% [27]of the BSCSD student population. The affordability barrier associated with private Montessori schools limits options for many families, and our charter school would provide an inclusive alternative.

Ballston Spa has experienced a steady population increase, with many families choosing to move to the area for its strong school district and community resources. According to census data, the number of young children in the region has remained consistent, reinforcing the need for diverse and accessible educational options. Additionally, the percentage of students with

[27] New York State Education Department. (n.d.). *Enrollment data for Ballston Spa Central School District.* Retrieved from https://data.nysed.gov/enrollment.php?instid=800000038604

disabilities in BSCSD (approximately 18%[28]) mirrors that of our proposed sibling school, Wildflower New York Charter School in the Bronx, which currently serves 22% of students with IEPs[29]. Given this parallel, our model— which prioritizes inclusion and provides specialized support through a Montessori approach—would directly address the needs of students requiring alternative learning environments.

While the proposed charter for WUNYCS serves students in grades K–6, we recognize the critical need to expand access to early childhood education, particularly for children under five. The combination of high UPK waitlists, strong local interest in Montessori education, demographic consistency, and the demand for inclusive, developmentally appropriate models provides strong justification for our proposed first-year enrollment of 16 students. As part of our long-term vision, we have begun researching programs that serve children as young as age three to better understand the needs and priorities of local families. By exploring pathways to extend our model to include UPK in the future, we aim to meet a clear and growing demand while building a strong foundation for lifelong learning.

[28] New York State Education Department. (n.d.). *Enrollment data for Ballston Spa Central School District.* Retrieved from https://data.nysed.gov/enrollment.php?instid=800000038604

[29] New York City Department of Education. (n.d.). *Wildflower New York Charter School*. Retrieved March 13, 2025, from https://www.schools.nyc.gov/schools/X633

R-04d – Evidence of Outreach

Evidence of Community Outreach and Engagement

Our community outreach efforts have yielded strong evidence of student demand, as demonstrated by the 68 local families who have already expressed interest in enrolling their children in our proposed school through our digital interest forms. Our online interest forms serve both as a tool for outreach and as a direct measure of the need for expanded educational options in our community. The overlap between our outreach efforts and student demand is evident in the active engagement we've received from families following our Facebook and Instagram accounts on social media, as well as in the growing number of parents who have completed the interest form. We continue to receive new interest forms daily. Below is a table documenting our outreach efforts and brief descriptions, followed by evidence of community outreach and engagement on the accompanying pages.

Document Provided	**Page Number**	**Brief Description**
WUNYCS Informational Flyer	3	Created informational flyer with key information including proposed year/mission/vision and description of lead applicant/founder Courtney Murphy. Included QR code linked to our interest forms for prospective families. Passed these out to families at Ballston Spa public library story time as well as throughout local community boards.
Posted flyers in community boards	4-7	Images of local community boards where our informational flyers were hung (throughout Malta, Milton, and Ballston Spa- which makeup BSCSD).
WUNYCS Facebook Page	8-47	Social media presence on Facebook as well as insights to each post
WUNYCS Instagram Page	48-51	Social media presence on Instagram *Note: the posts on instagram contain the same photos as well as text as Facebook
Google Form: Prospective Family Interest Form	52-54	QR code was provided on paper copy of flyers linked to this google form. Additionally this was linked on our social media pages and shared in direct messages as well as on Facebook groups to gather interest.
Email communication to key stakeholders and	55-74	Outreach efforts through email to spread the word about our prospective school, create initial partnerships with local organizations, make everyone aware of our mission/vision for the school, and follow up to gather letters of support and

community members		interest forms. Outreach includes the local BSCSD board of education, elected officials, local Montessori schools, Ballston Area Community Center, Ballston Area Recreation Center, Spina Bifida Association NY Chapter, Ballston Spa Public Library.
Social Media Groups joined on Facebook	74-91	In order to promote the school, we joined local community groups in Ballston Spa and nearby towns to provide the link to our interest form and explain briefly about our school and program. We utilized these interest forms to begin further outreach for feedback (through discovery interviews) about our school.
Discovery Interview Questions	92-94	Once families filled out an interest form, we followed up in email with 'discovery questions' to gather feedback on our proposed mission/vision and school programming. Some families opted into answering the questions via email while others participated in phone calls.
Visit to Wildflower School	95-109	Lead applicant, Courtney Murphy, visited Hyacinth Montessori in West Philadelphia, PA. She was able to tour the space and speak with students as well as the teacher leaders. She utilized this as an opportunity to connect with other Wildflower School Teacher Leaders as well as a means to share what an authentic Montessori Wildflower classroom looks like with people who follow WUNYCS's social media accounts.

Wildflower Schools invites you to help a beautiful new school grow in Ballston Spa!

WILDFLOWER MONTESSORI UPSTATE NEW YORK

Our first location/timeline: Ballston Spa, New York: opening Fall 2026
Ages served: Primary classroom (mixed age class of 3 to 5 year olds)
Interested or know someone who might be? Email [redacted]

Our mission at "Ballston Spa Montessori"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that every student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

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[redacted]

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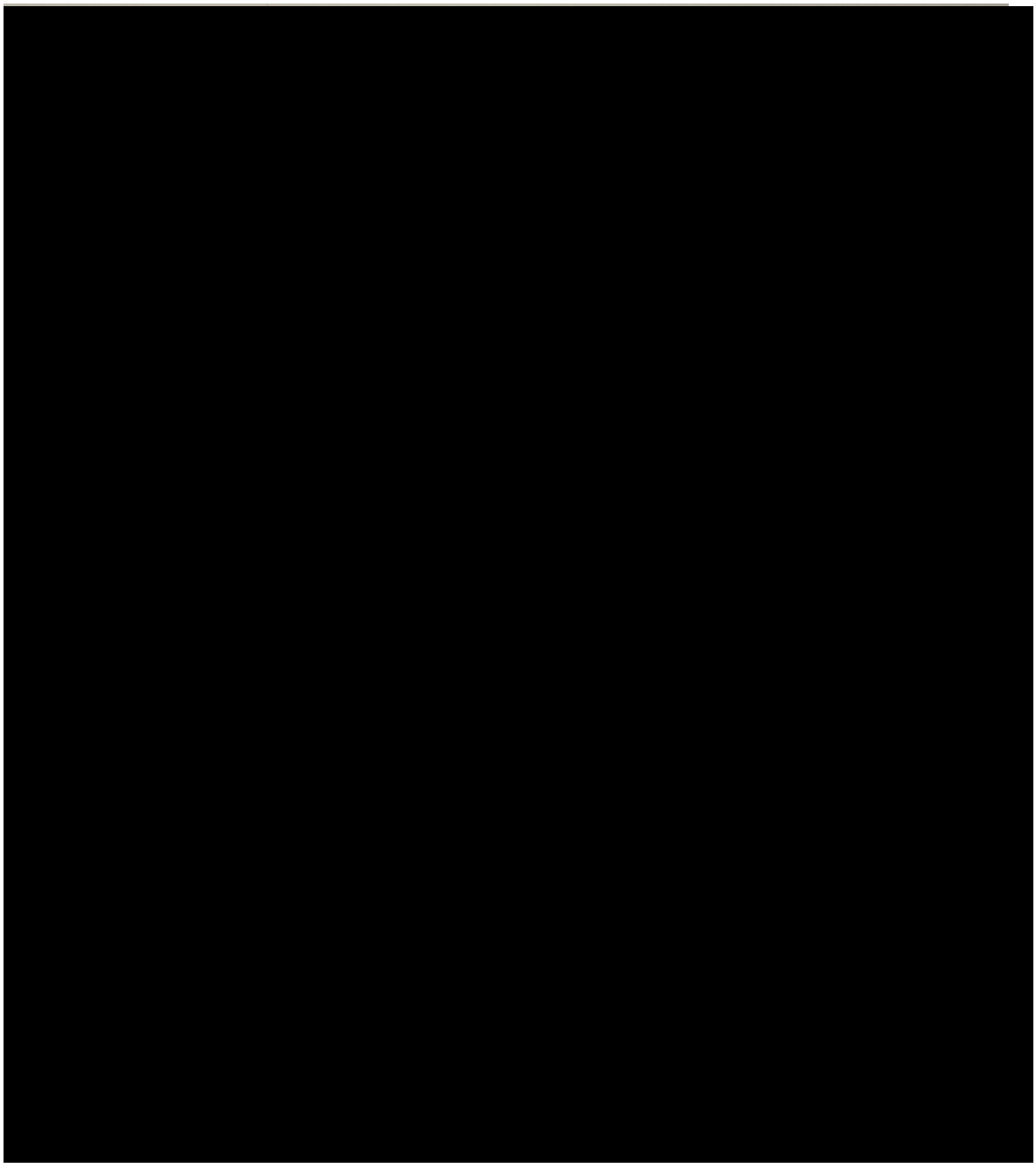
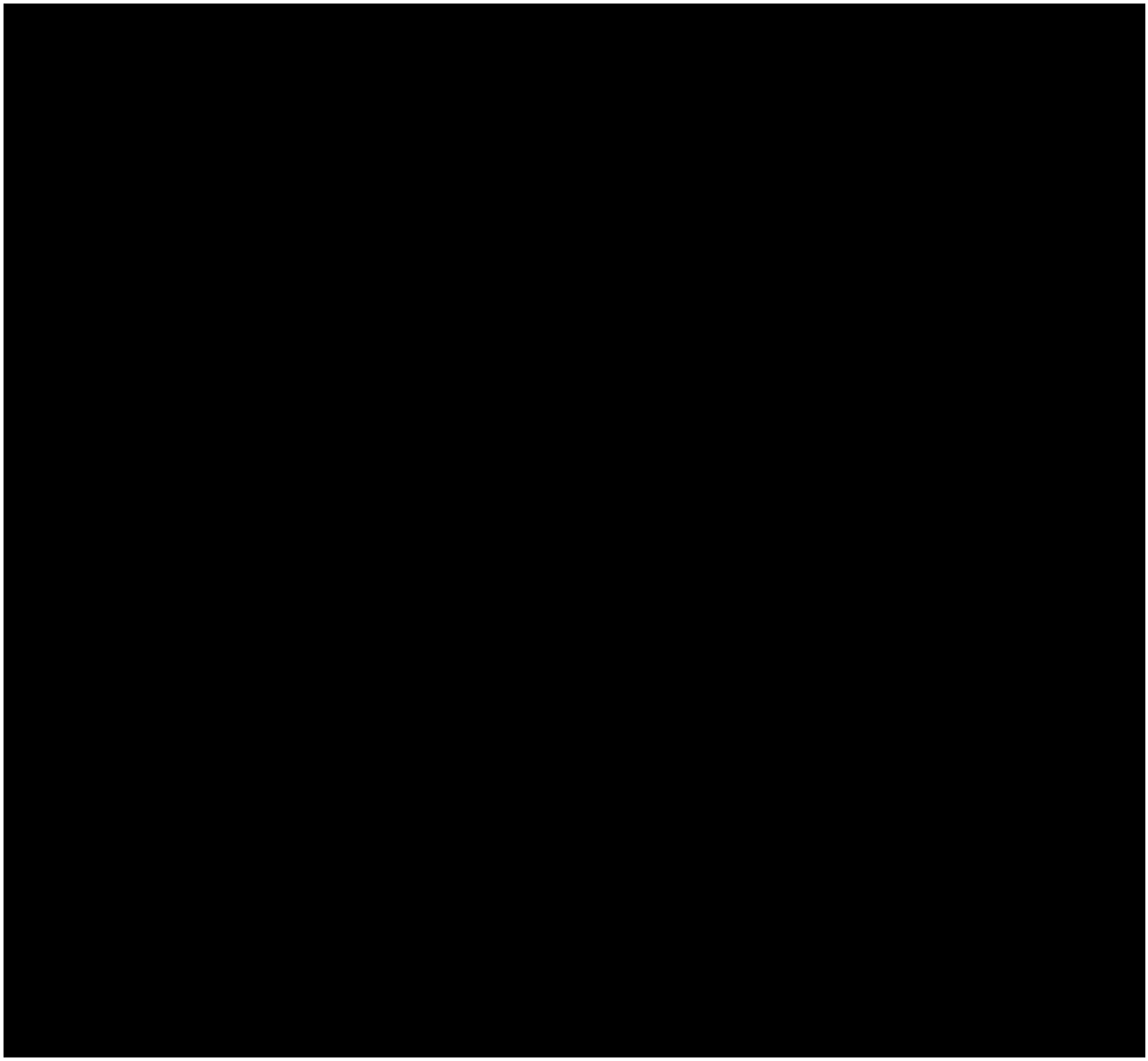
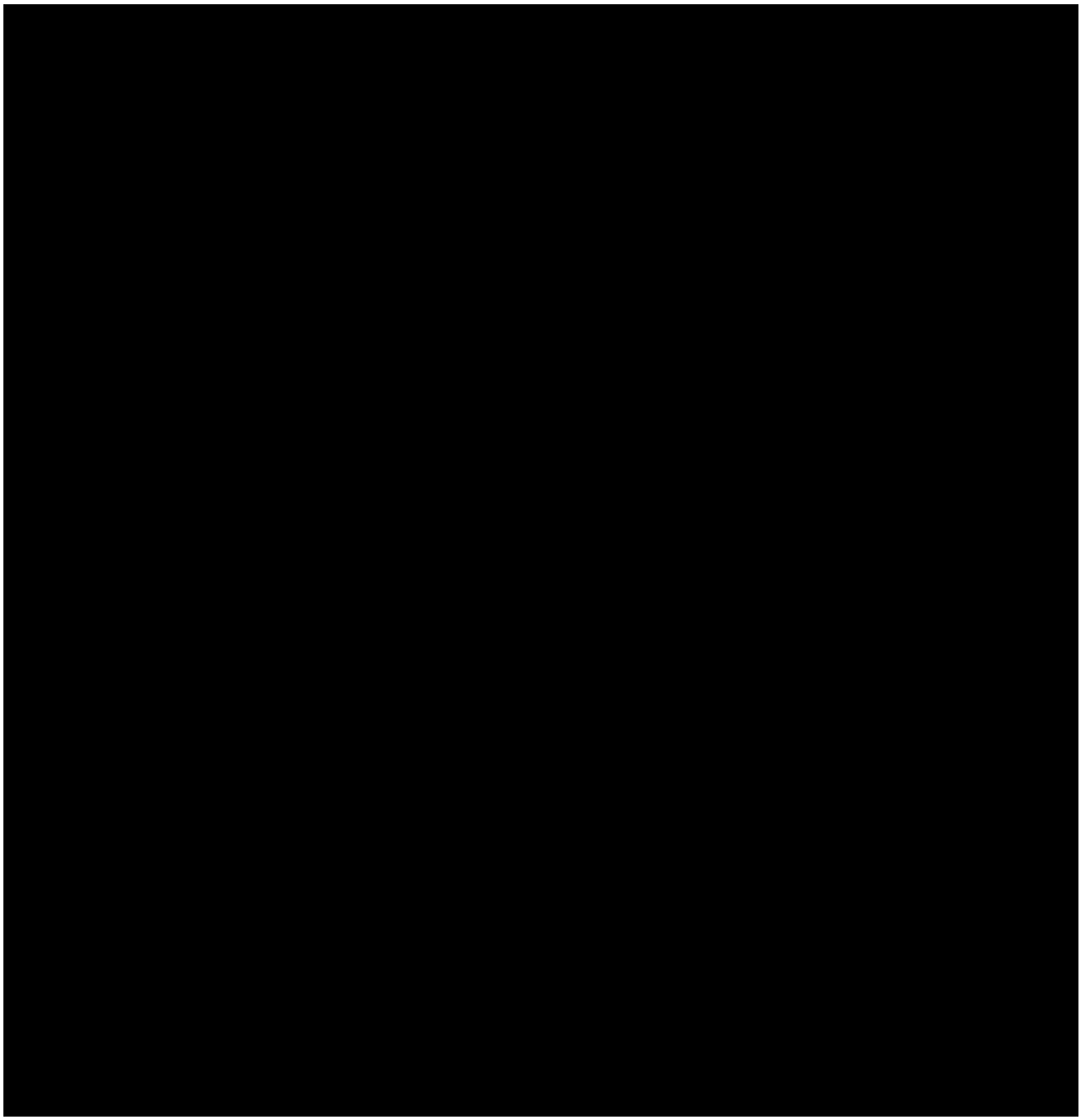
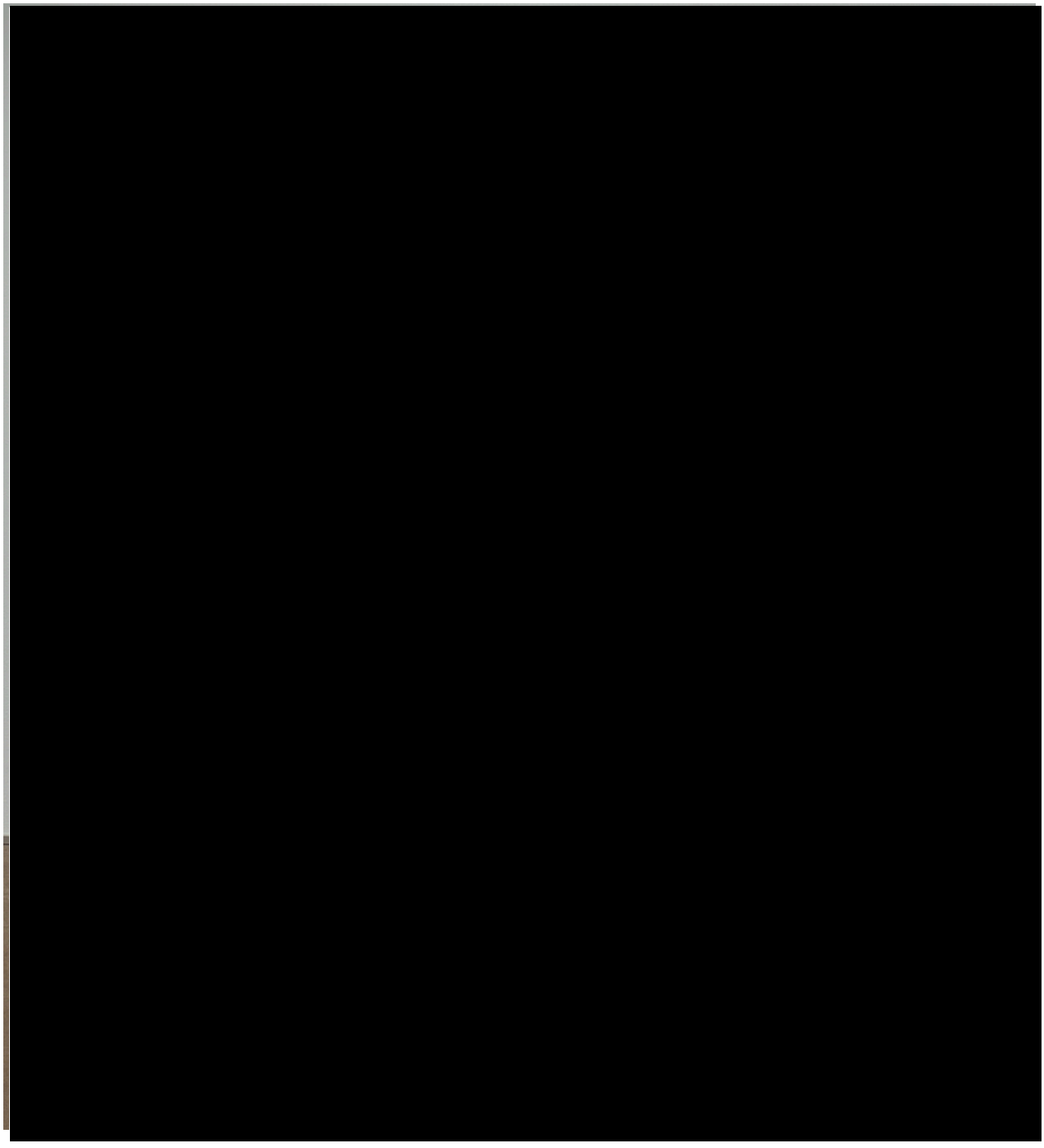
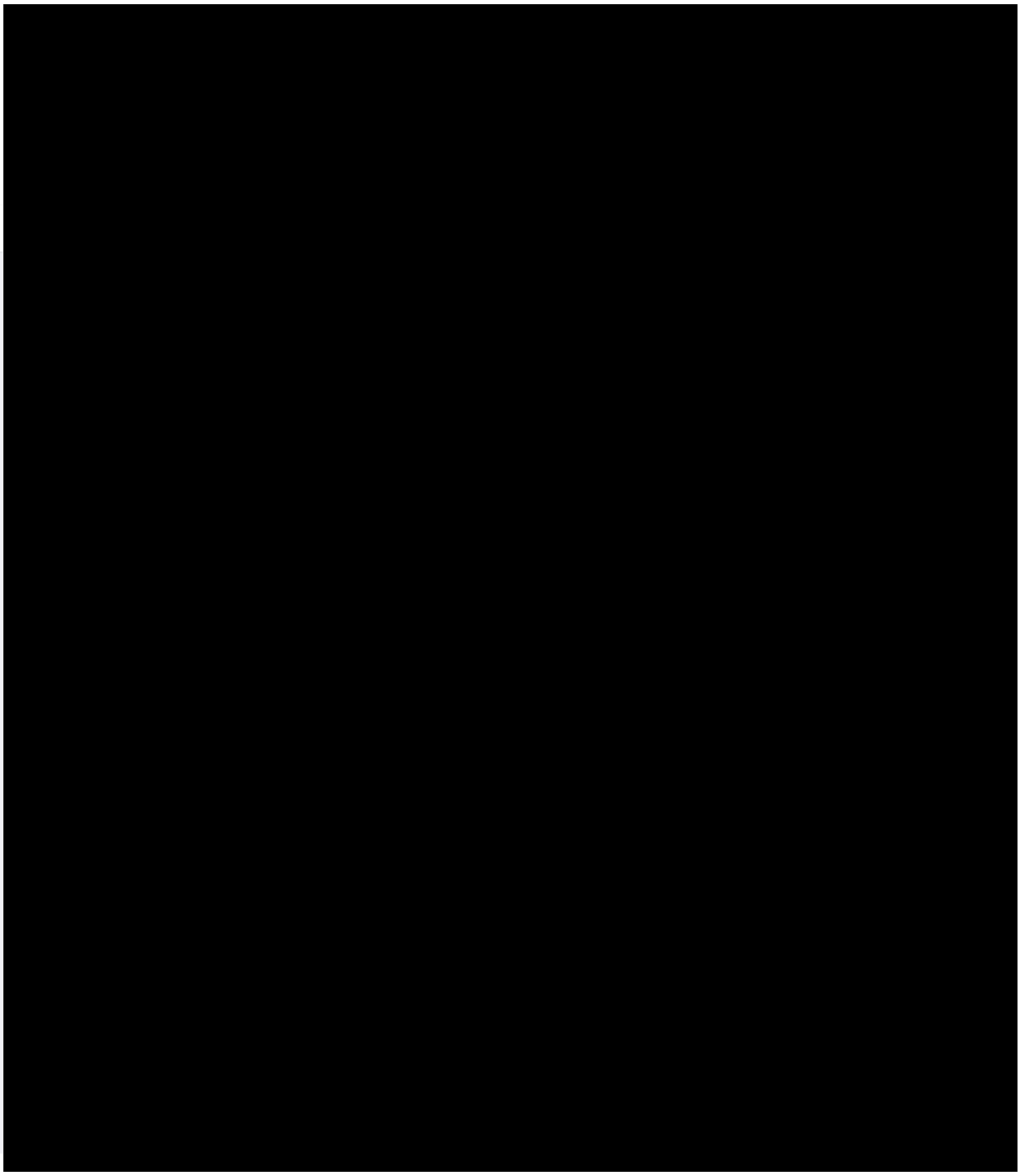


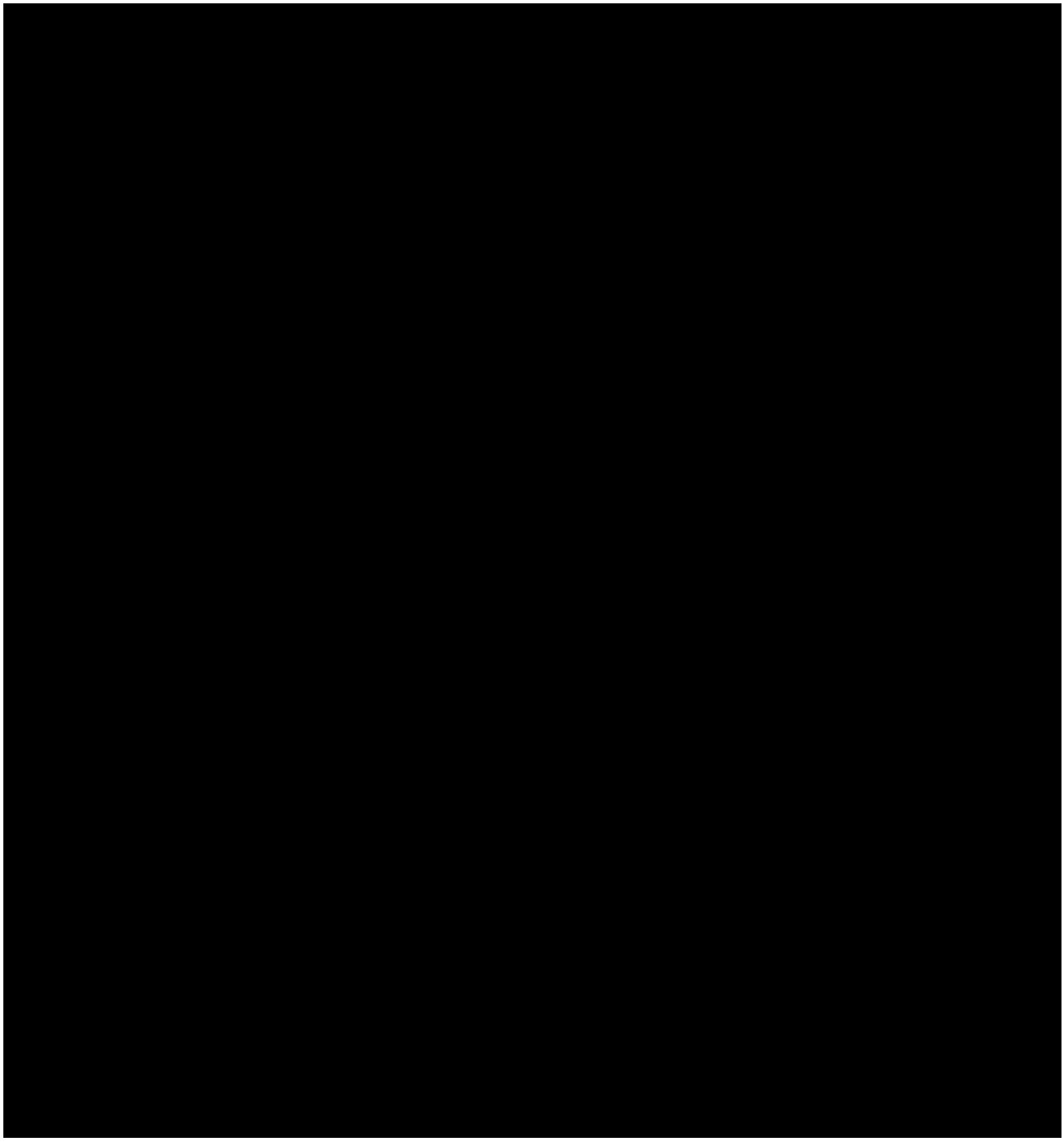


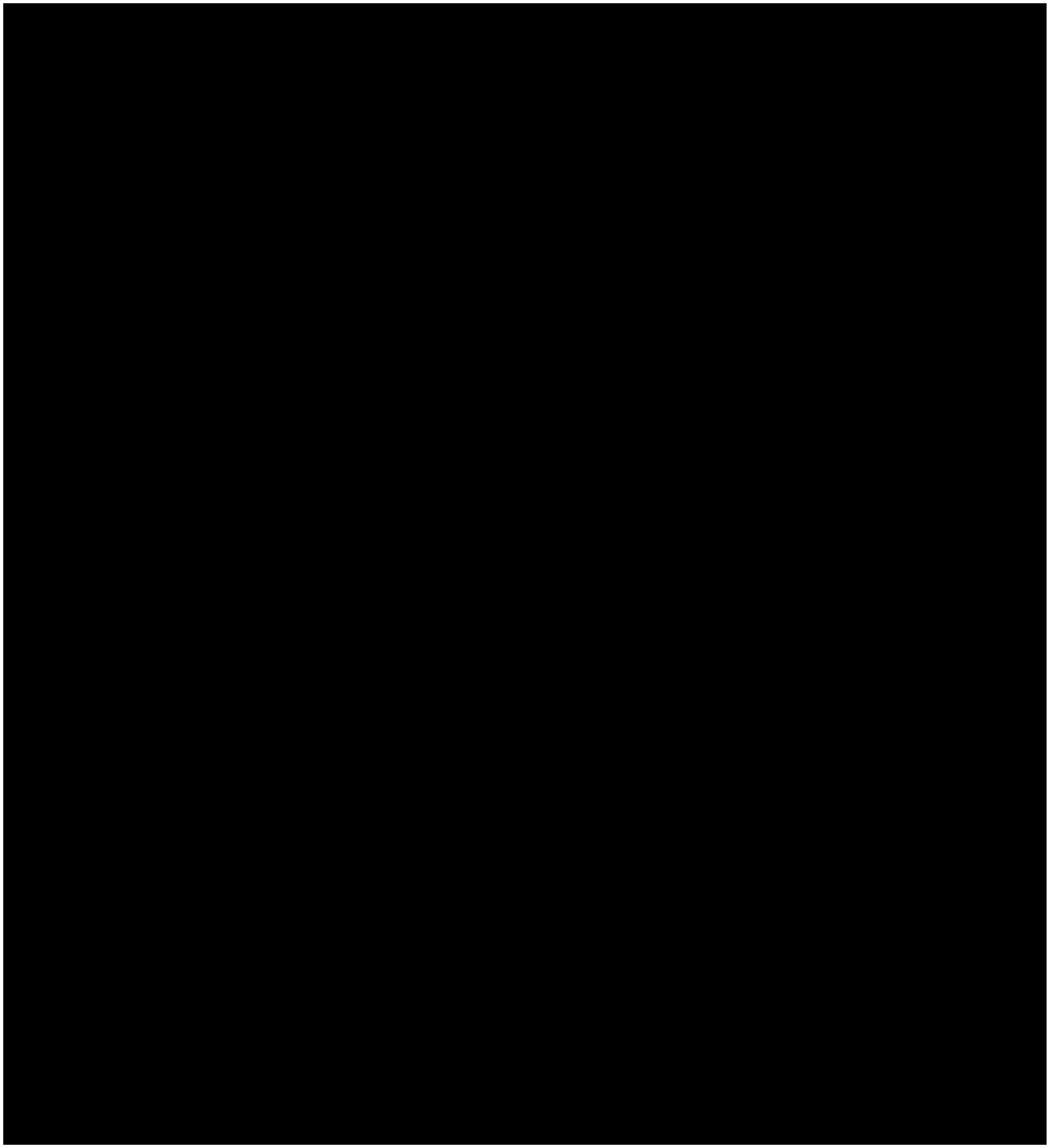


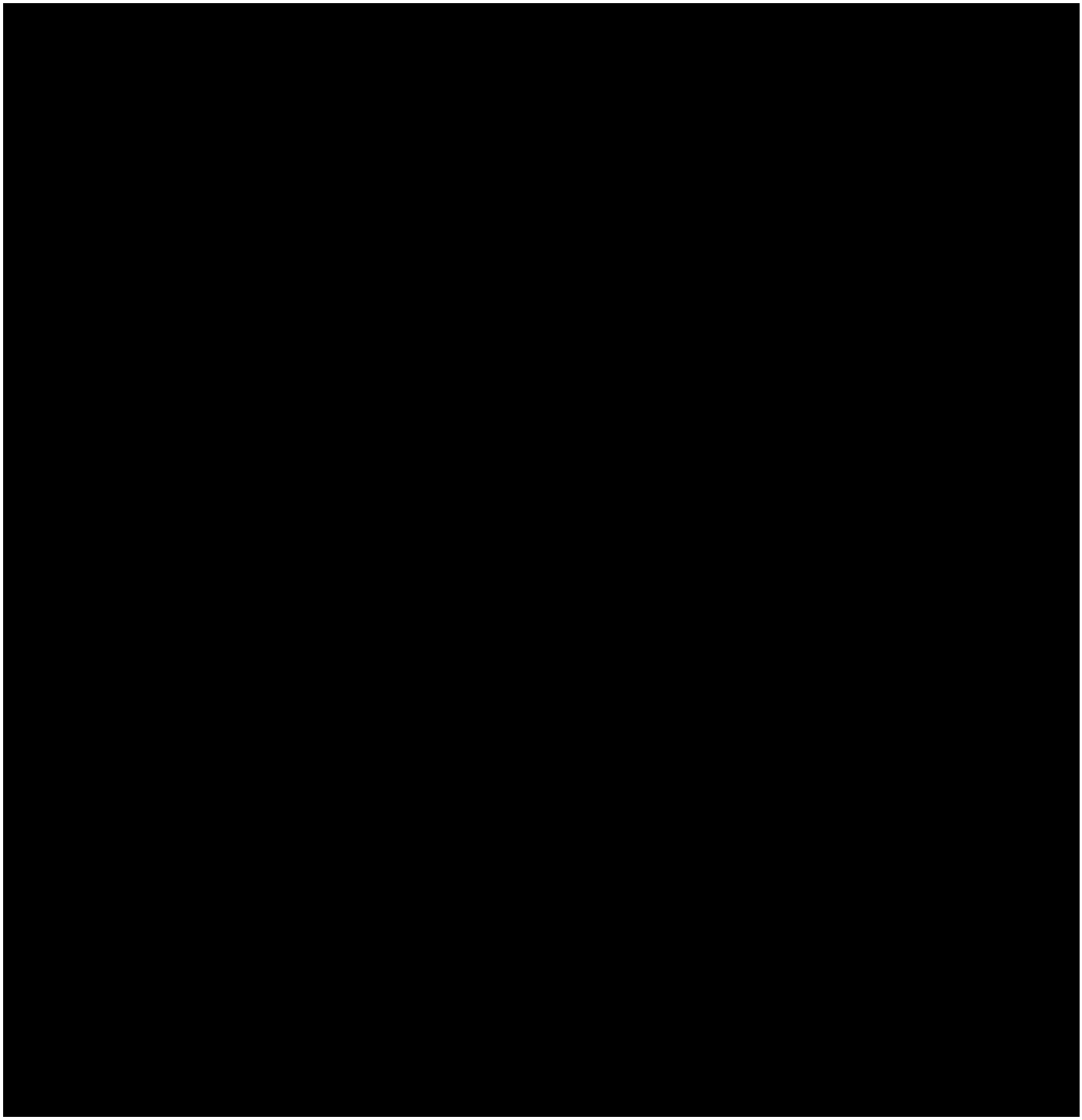


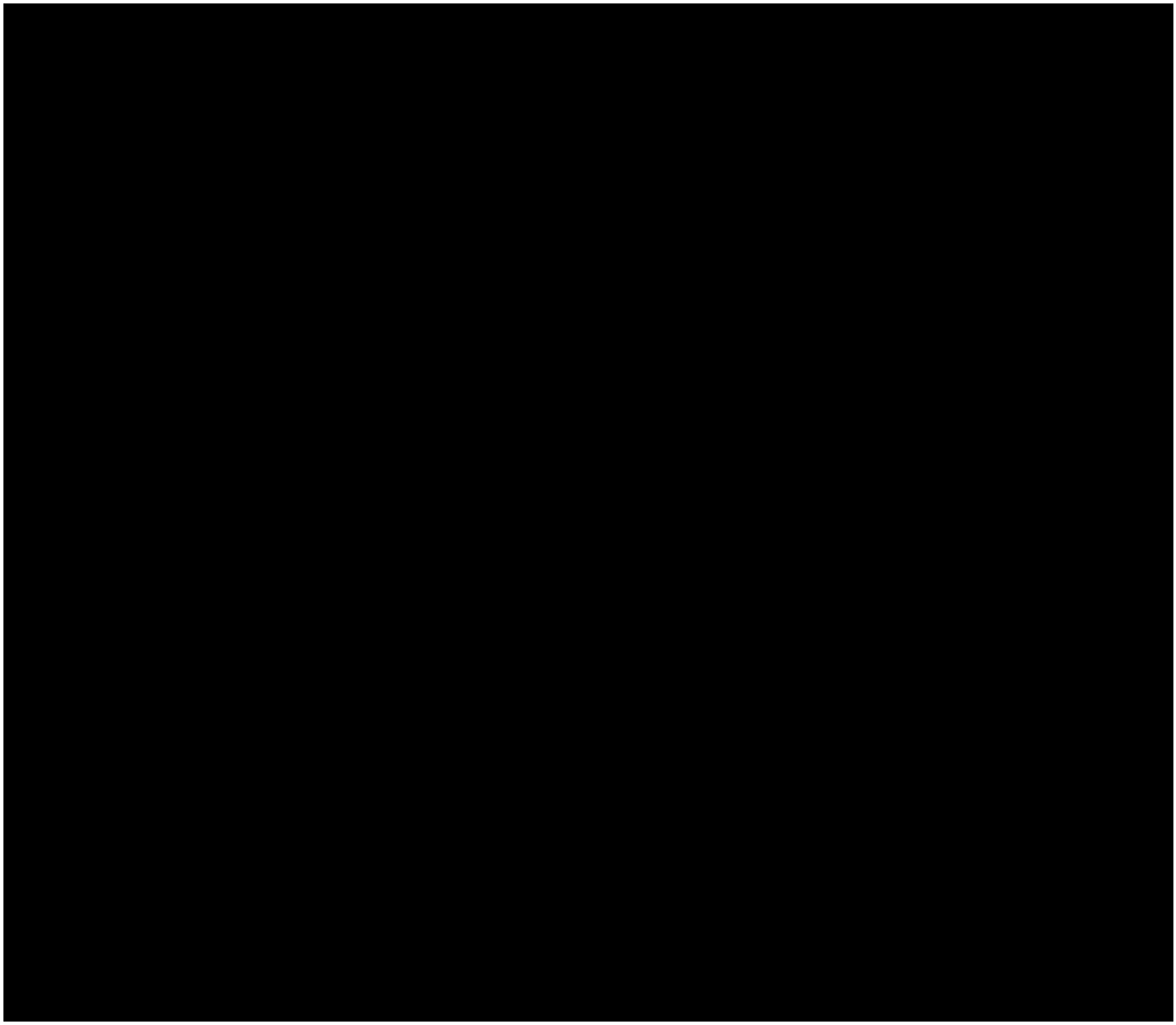


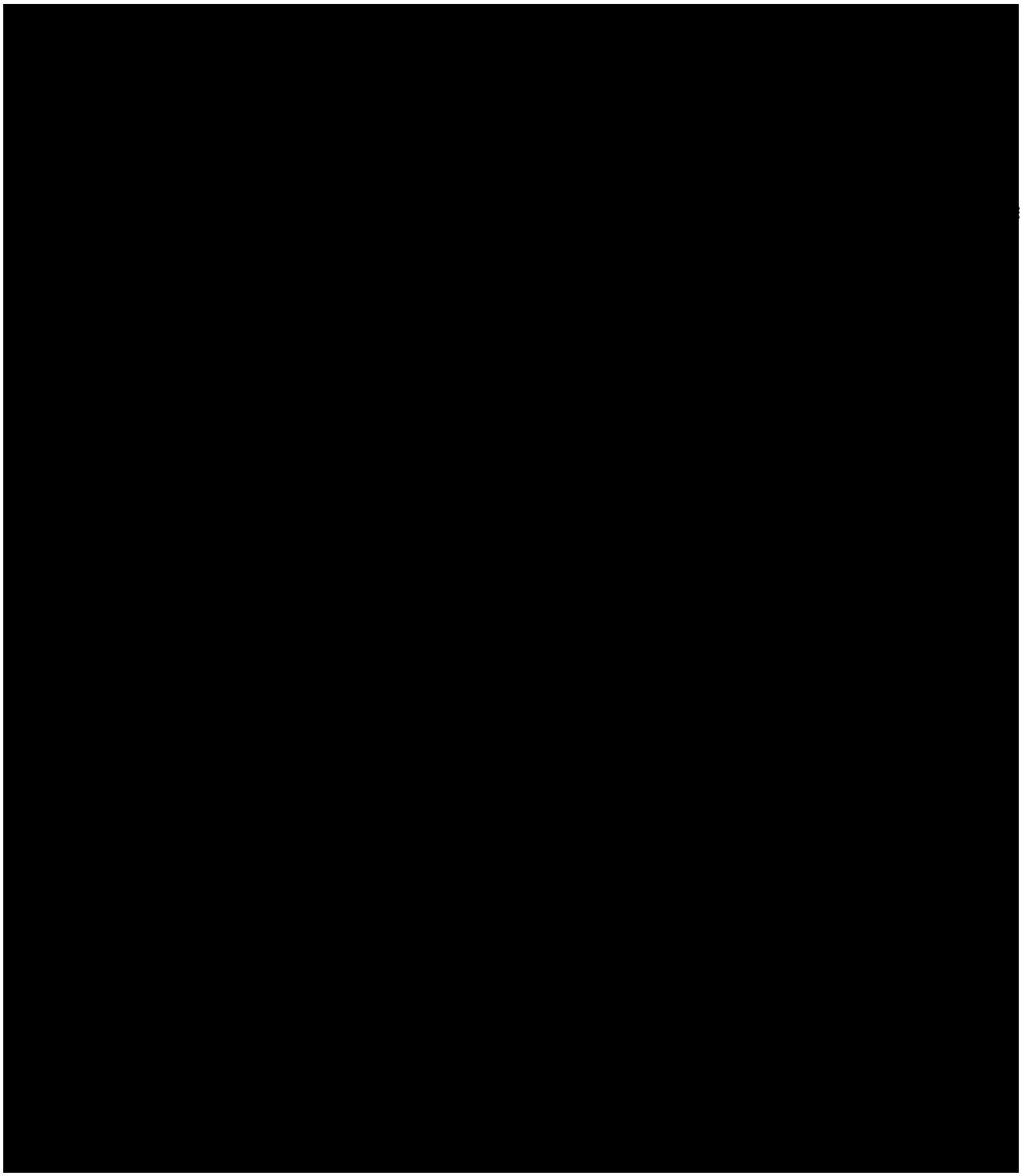
Wildflower Upstate New York's Post

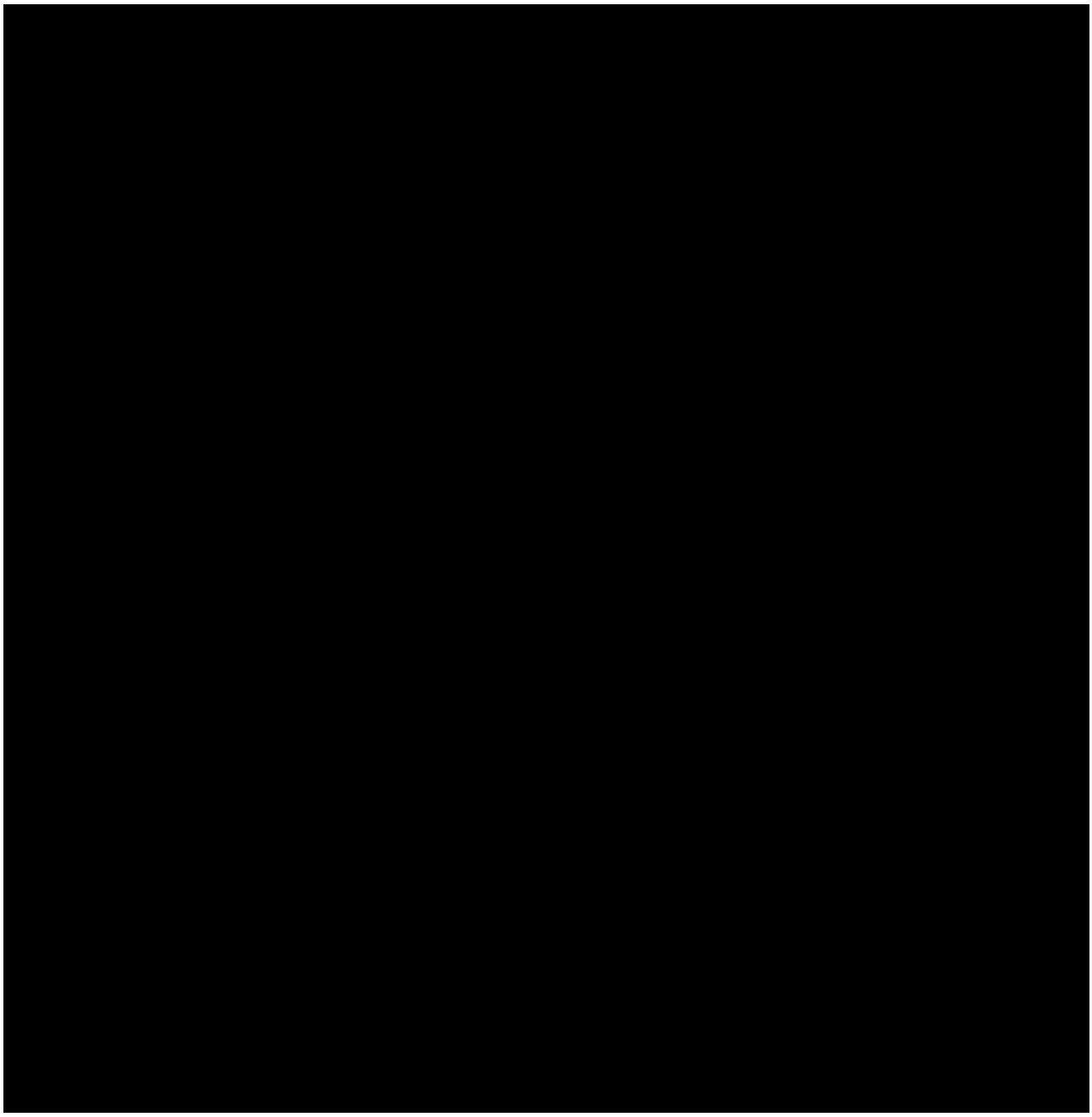


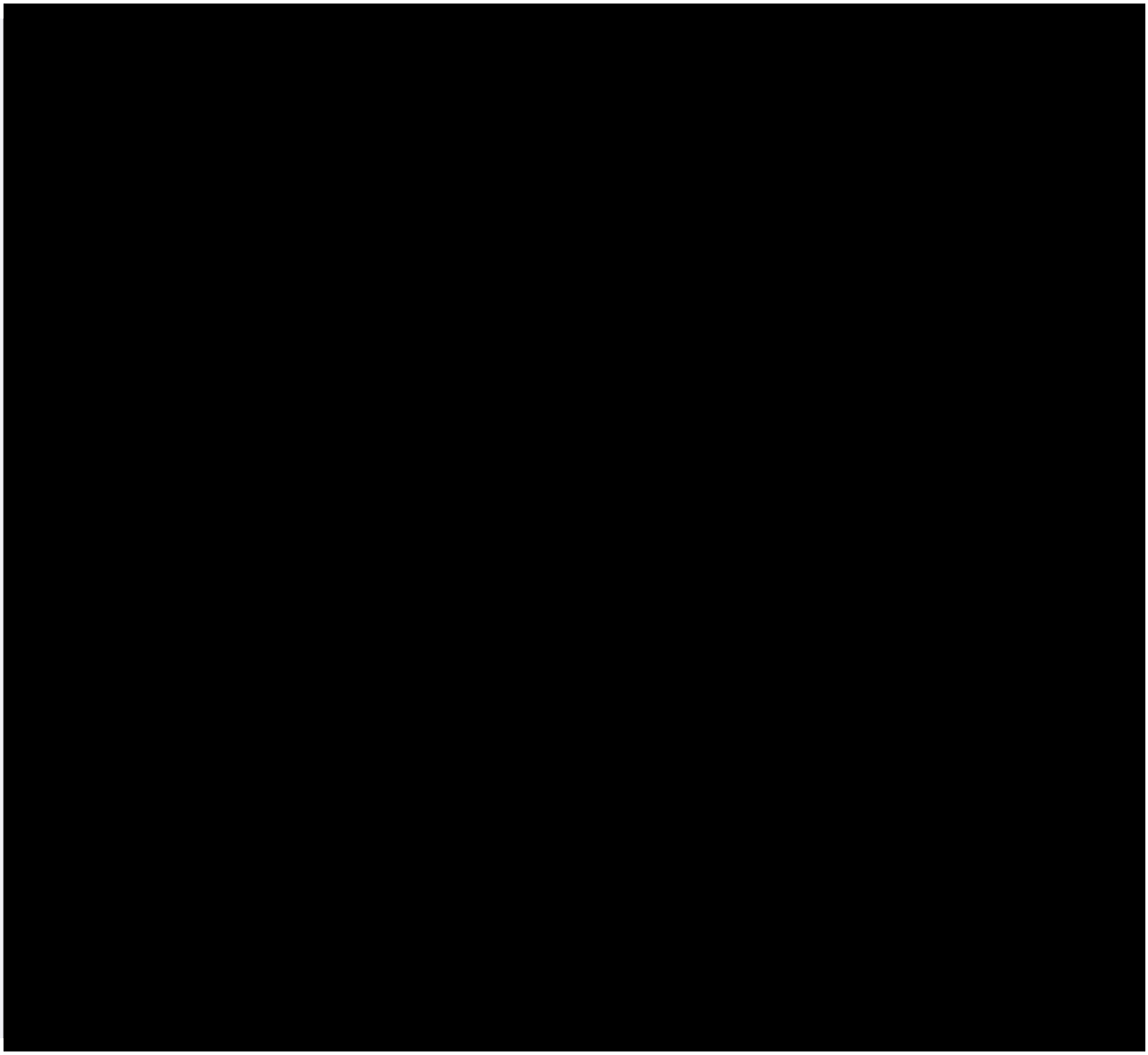


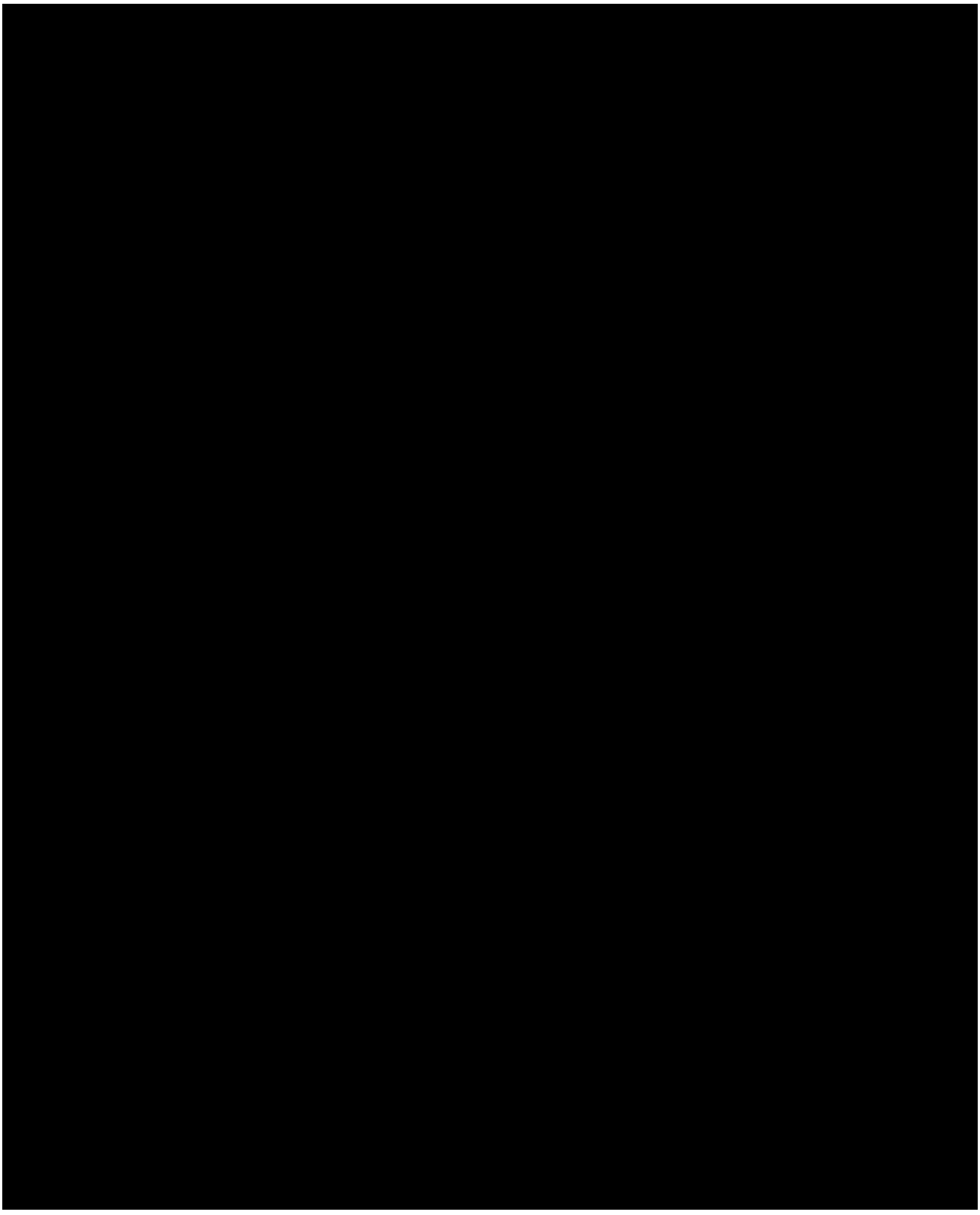


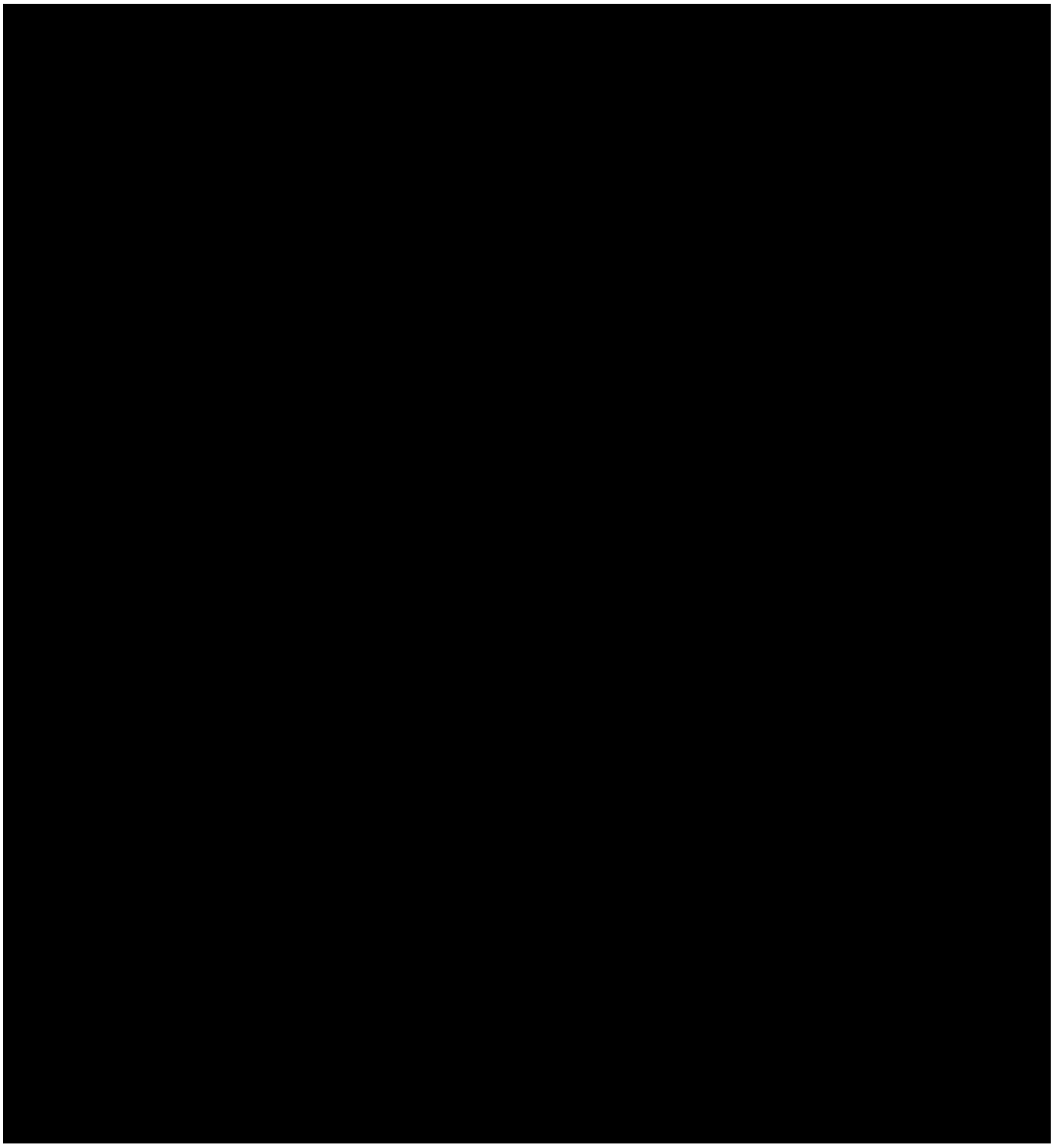


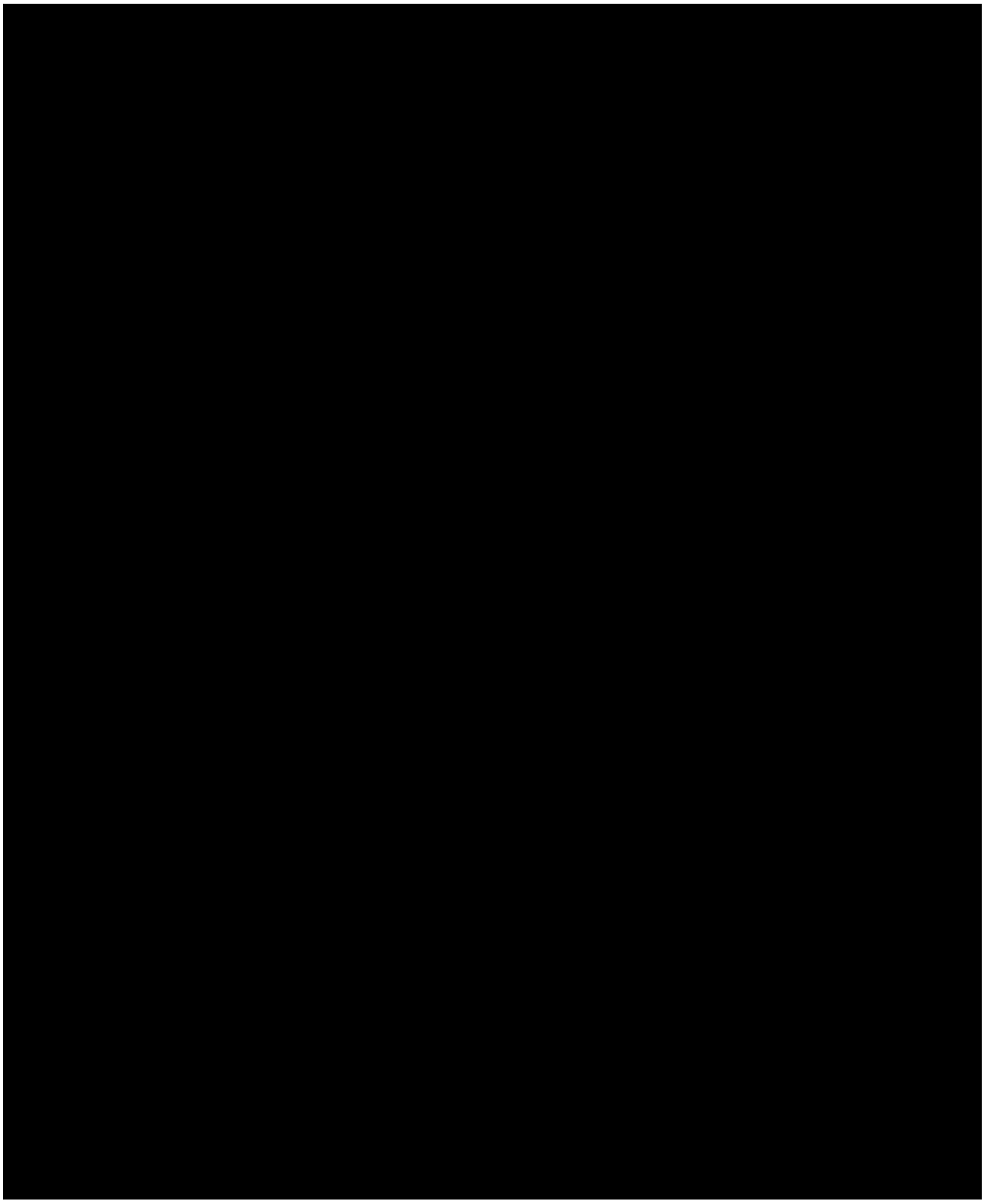


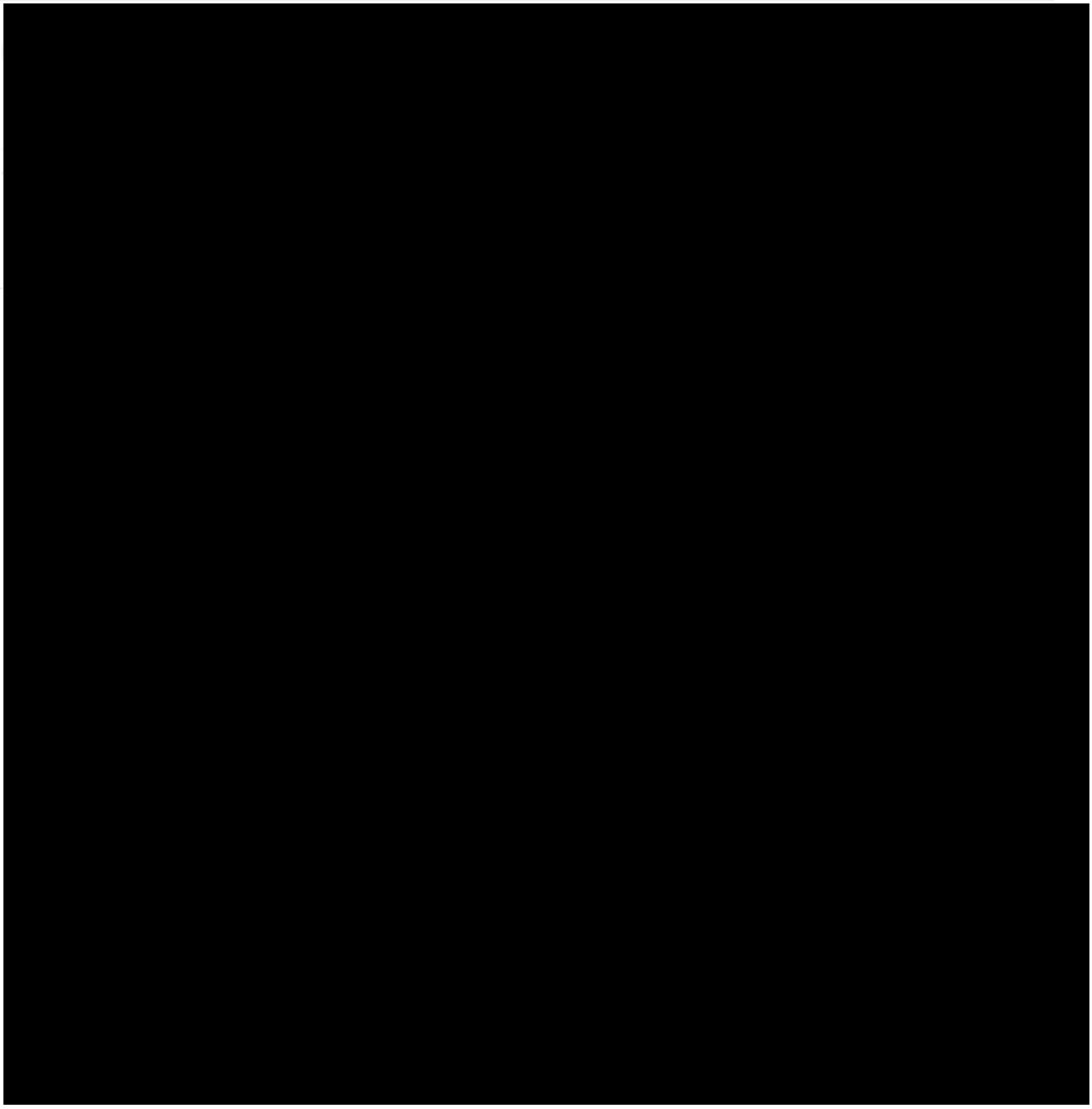


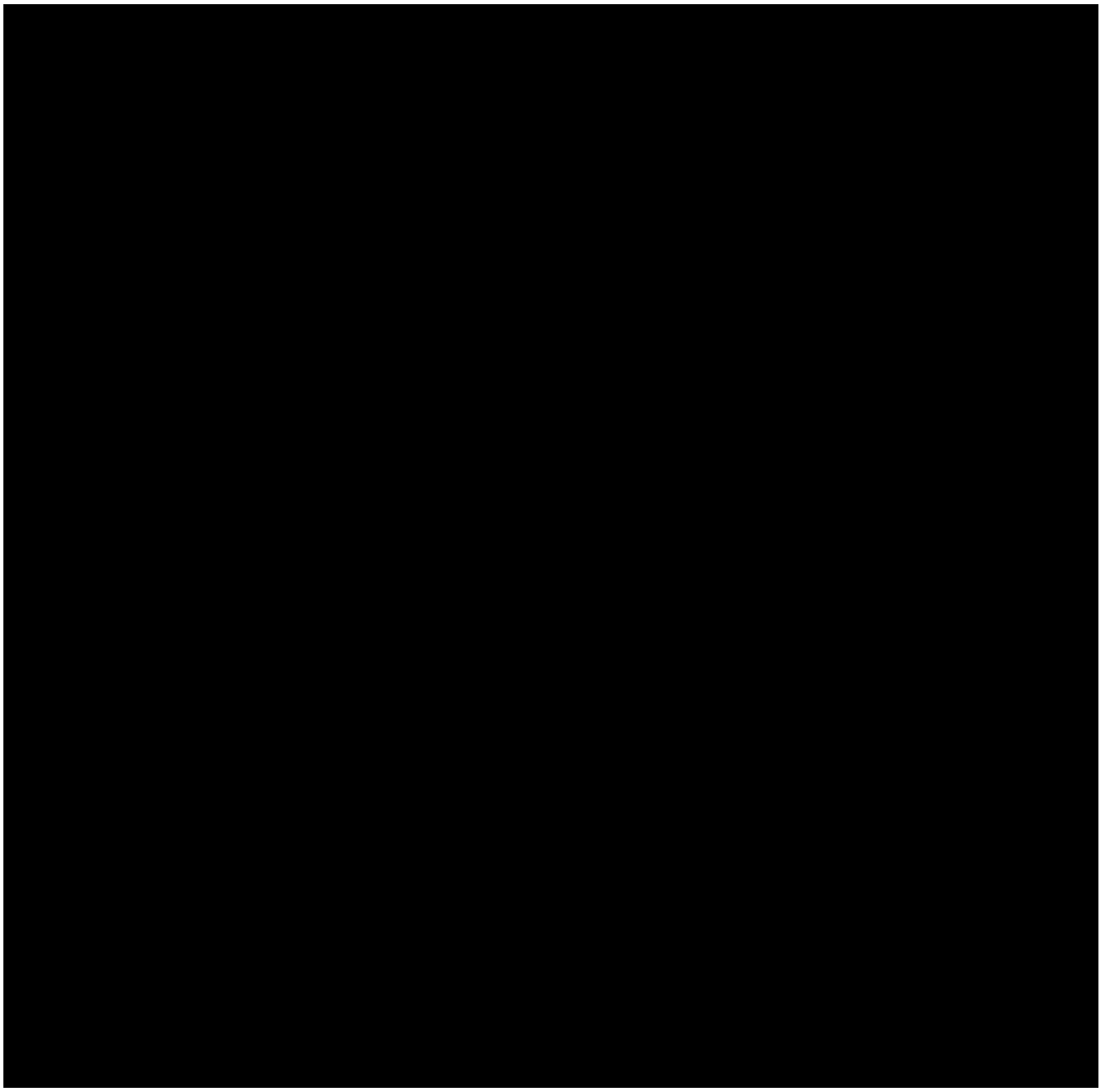


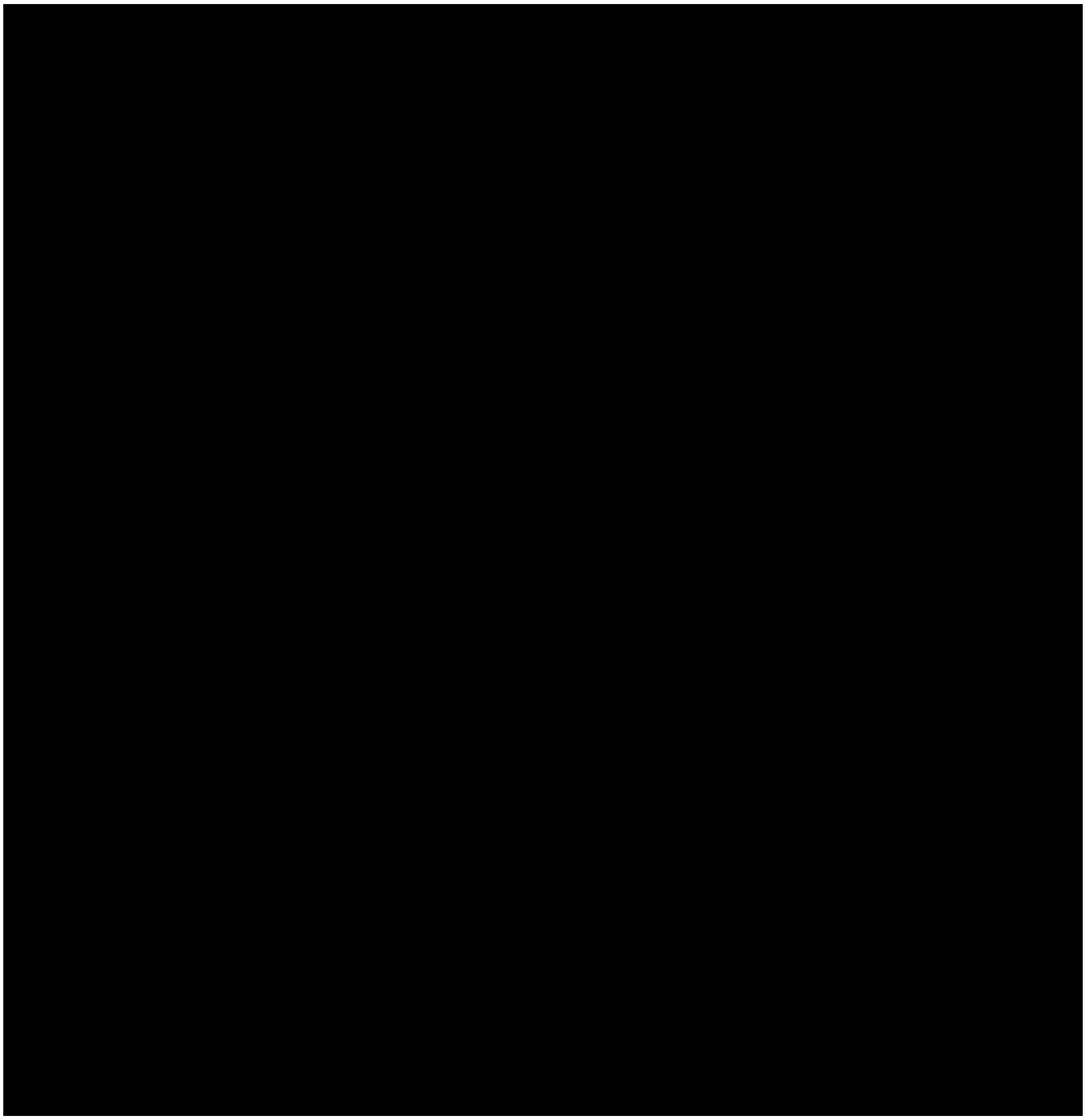


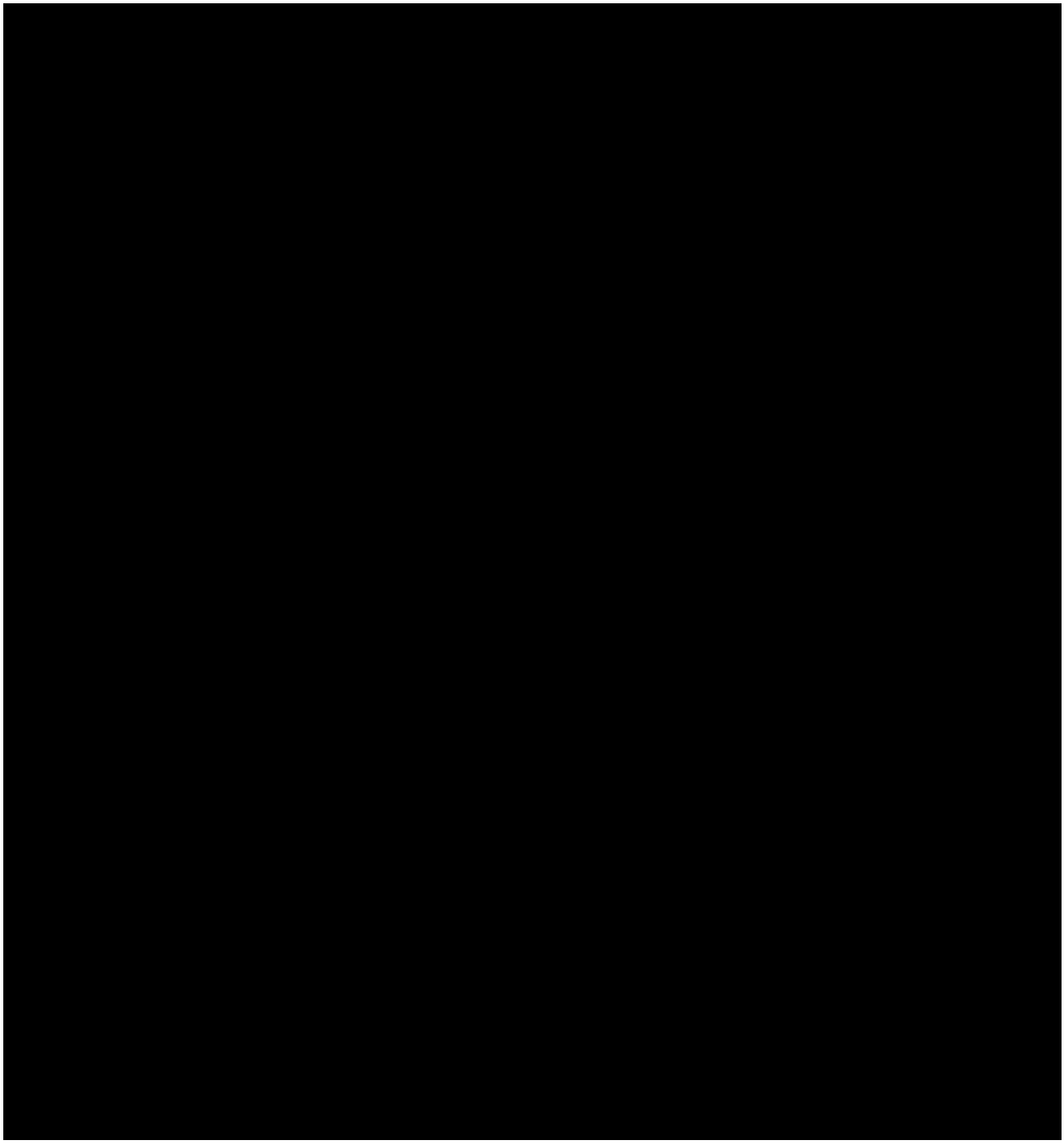


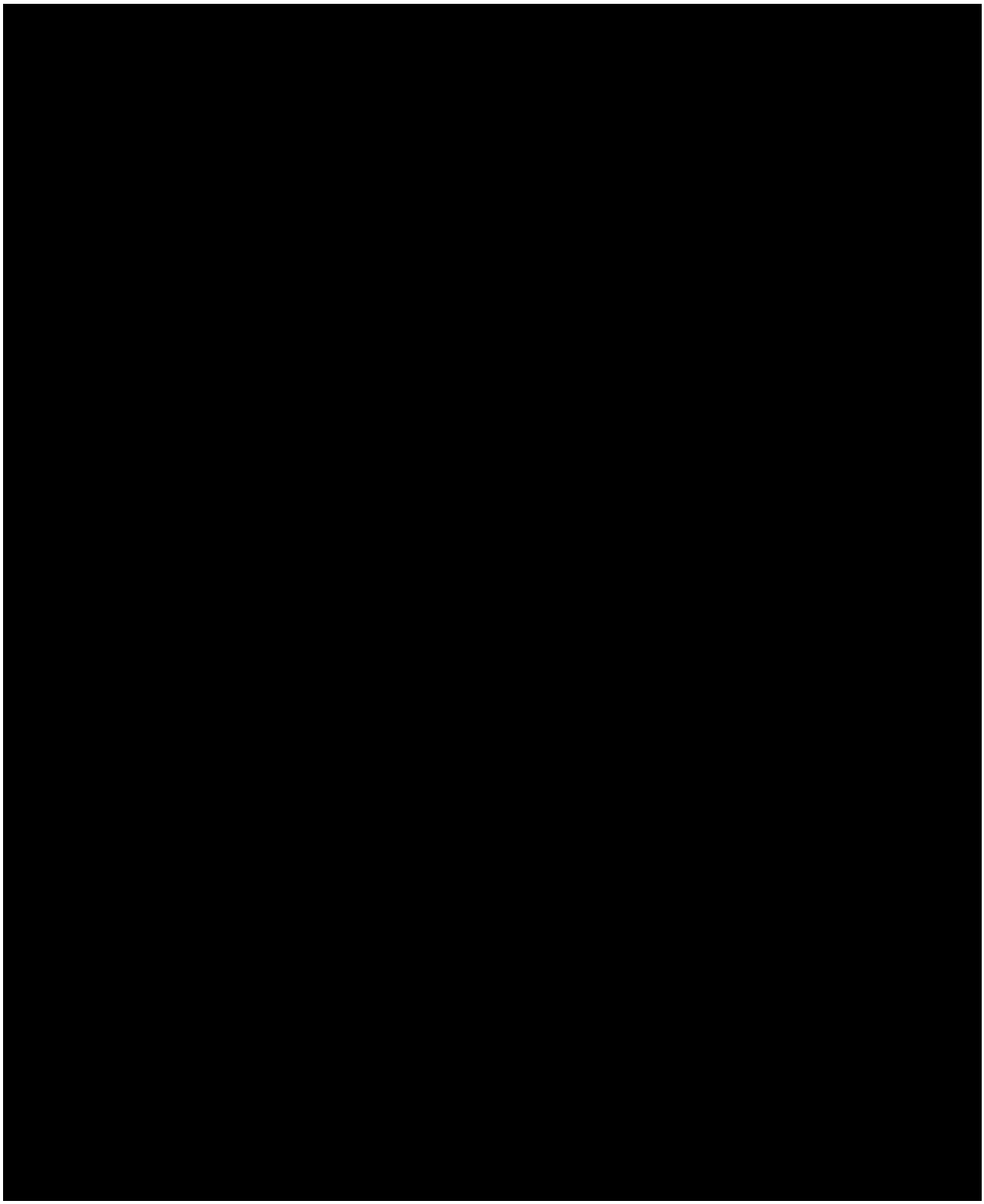


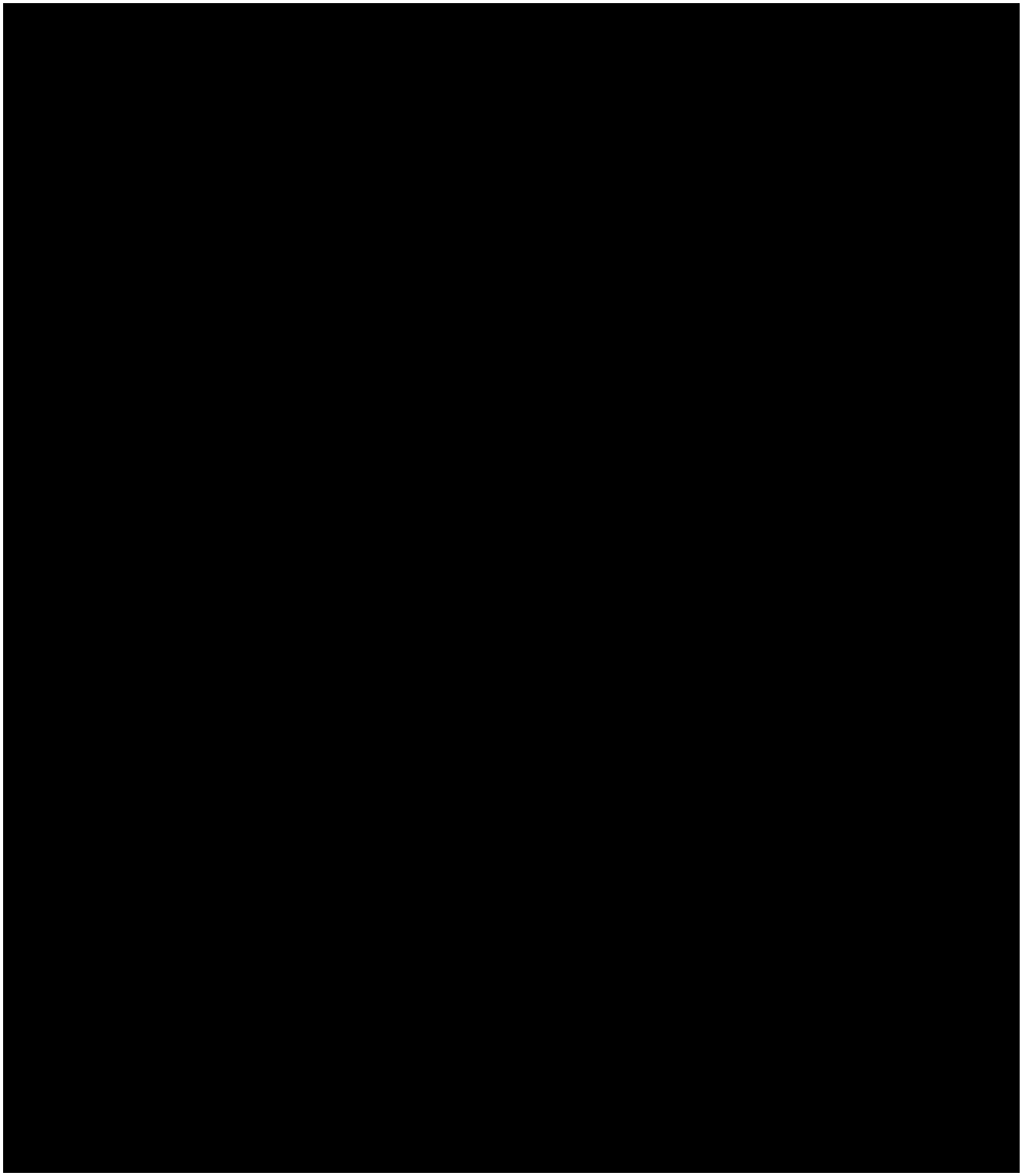


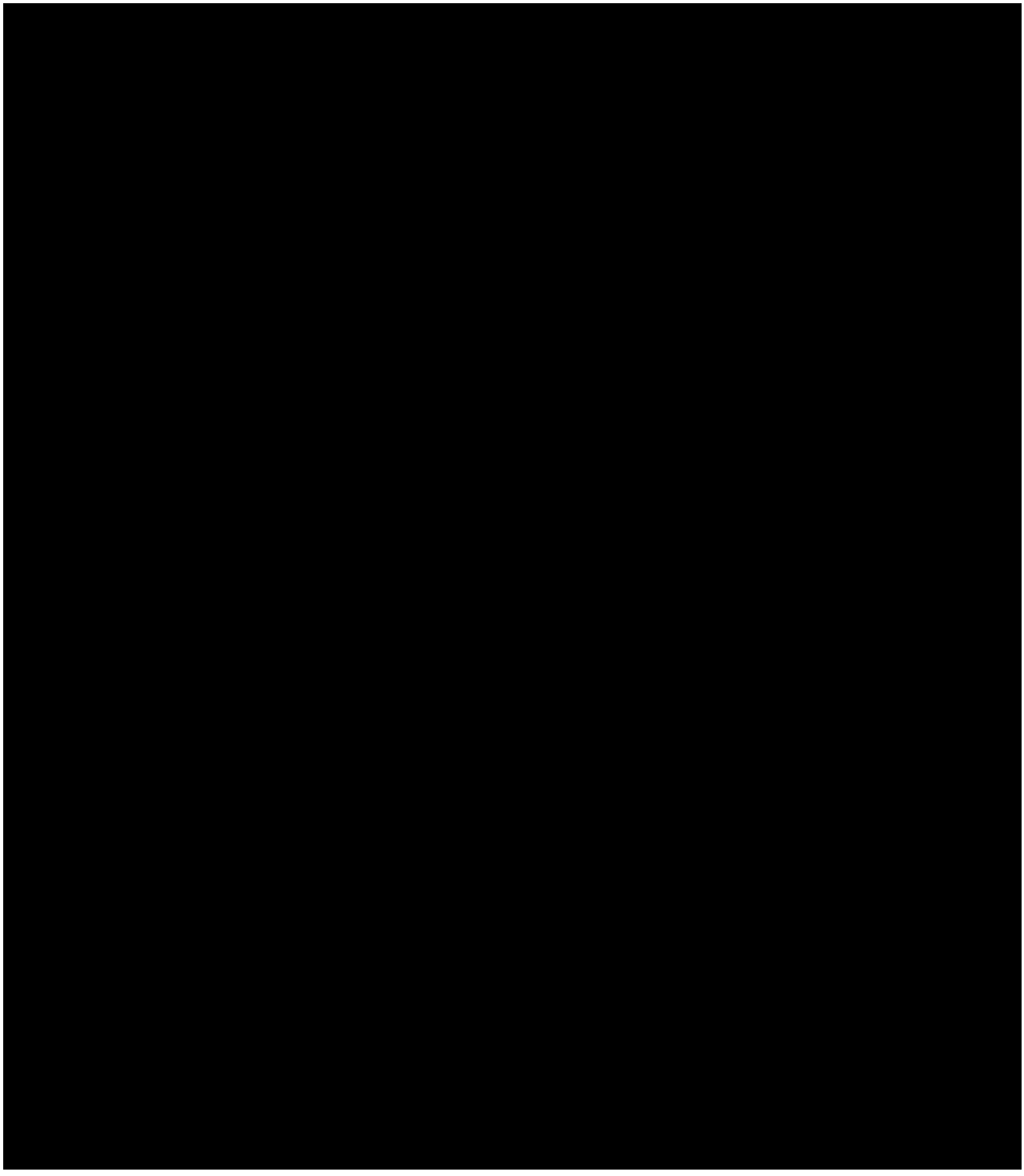


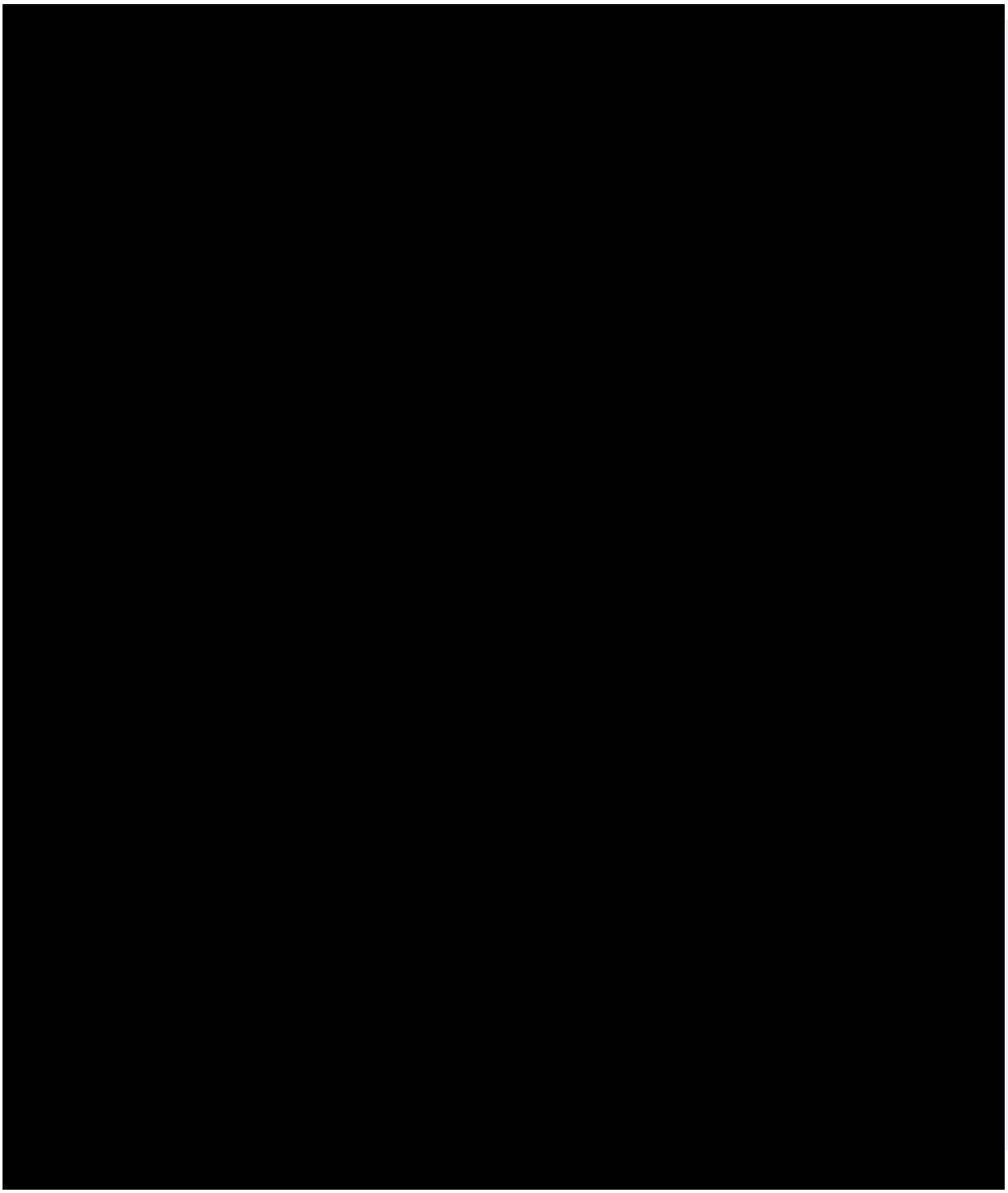


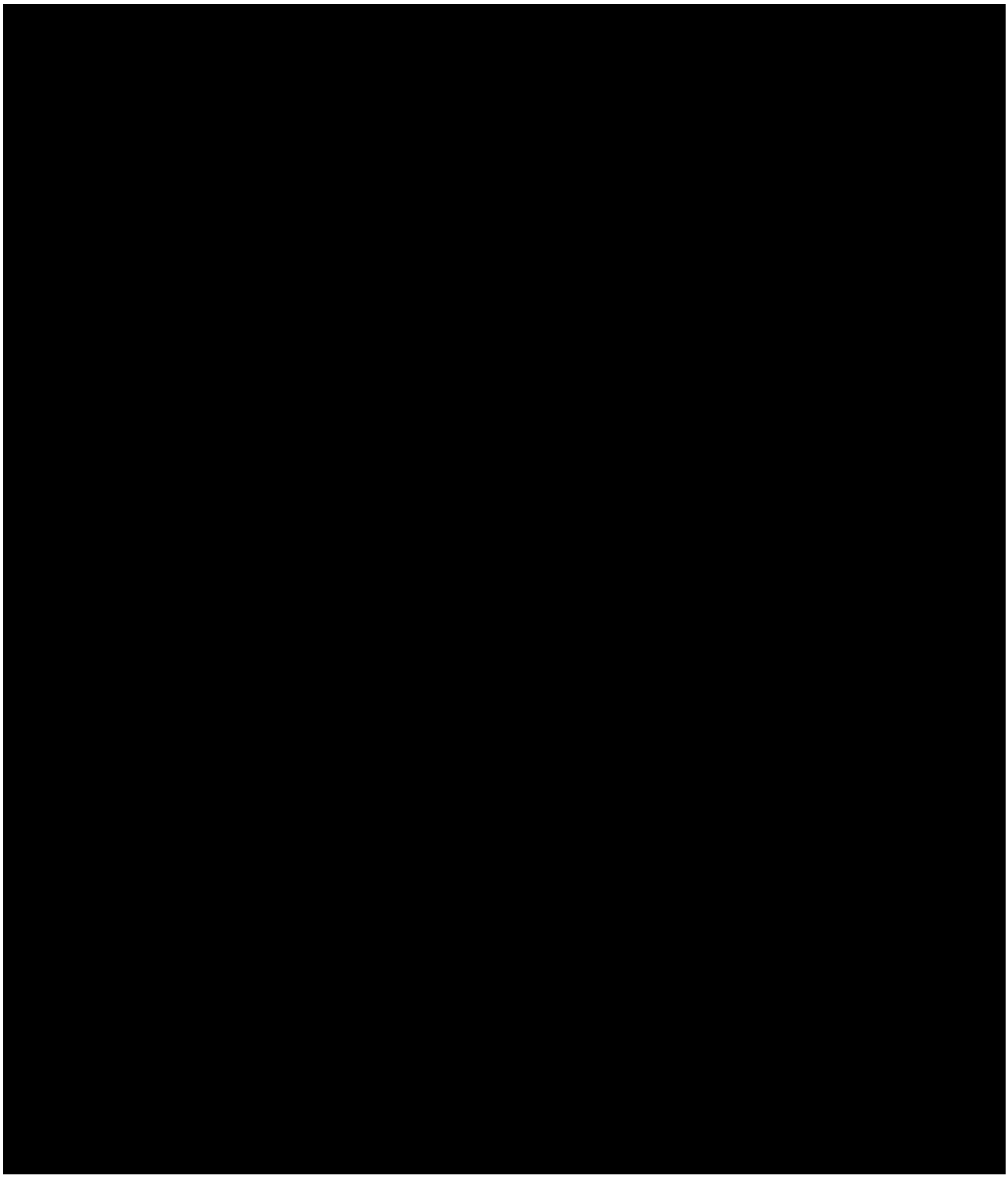


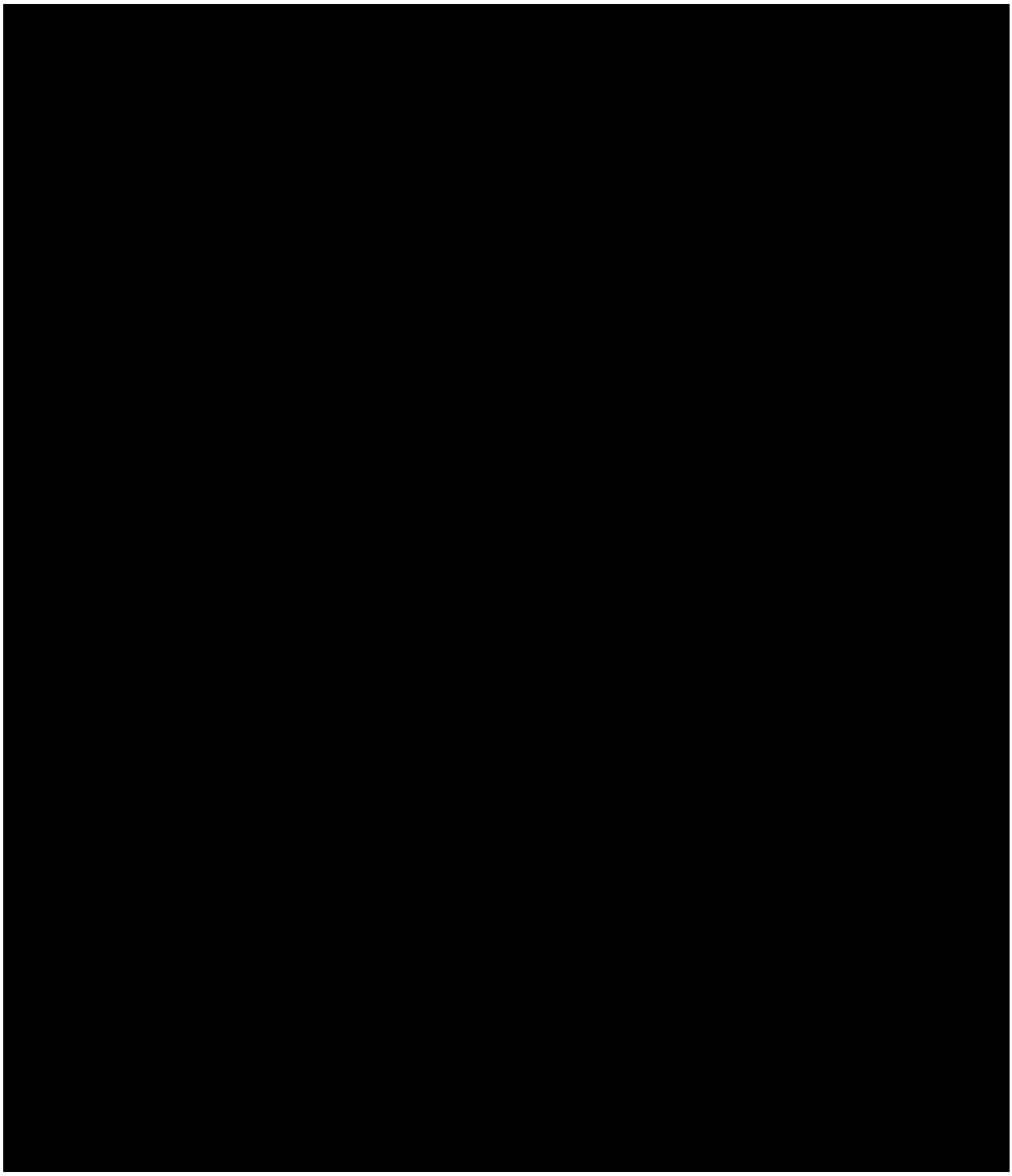


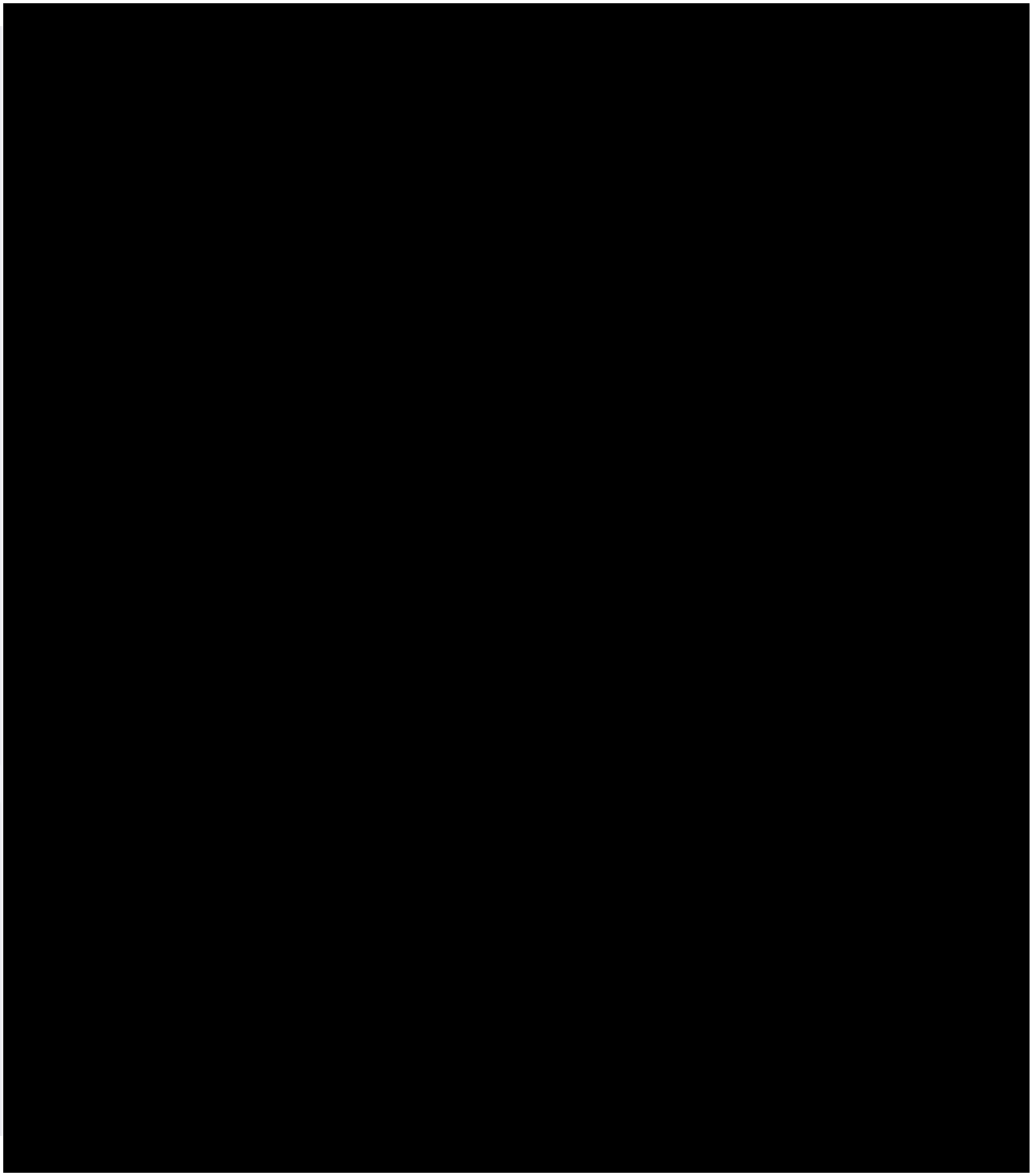


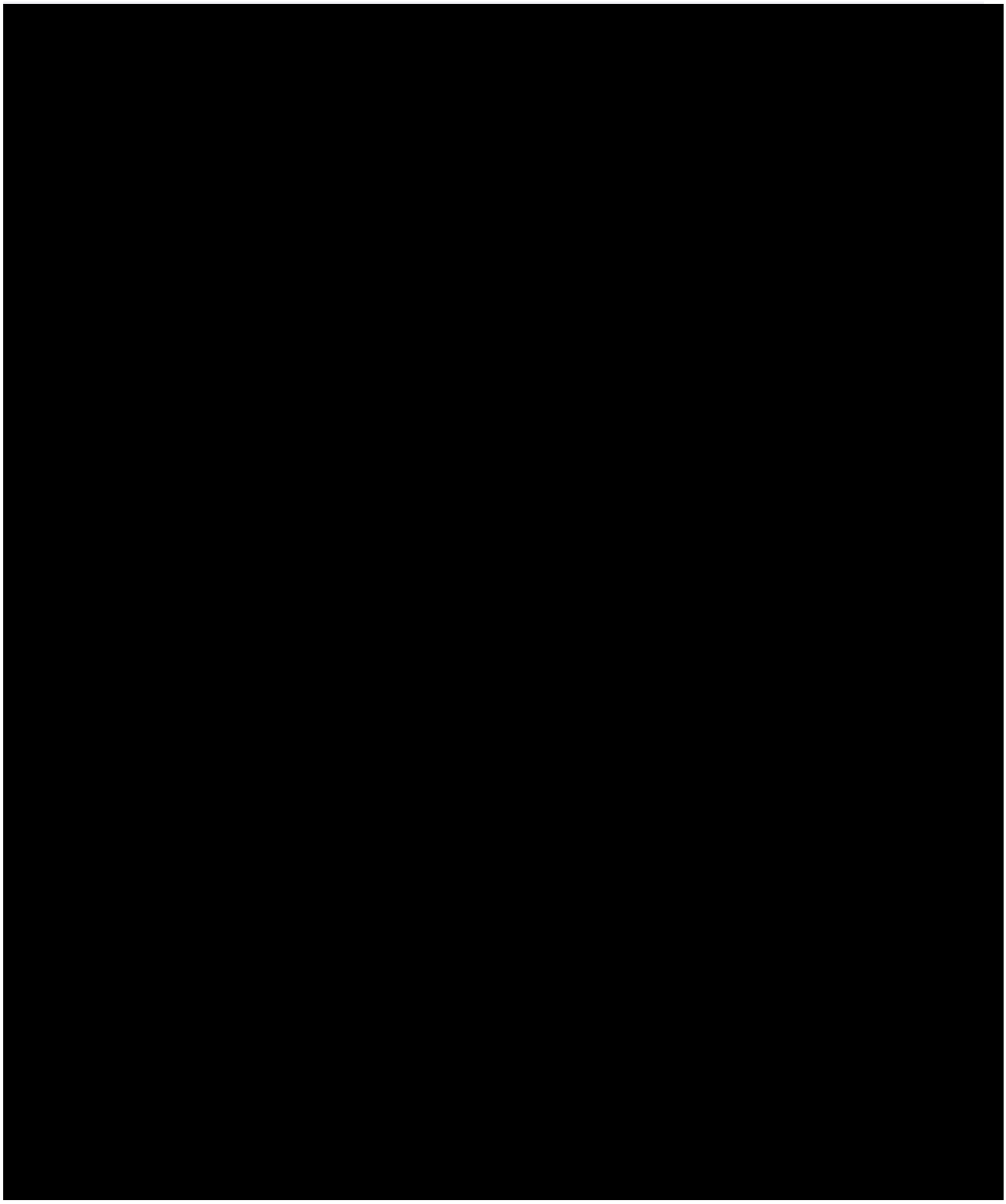


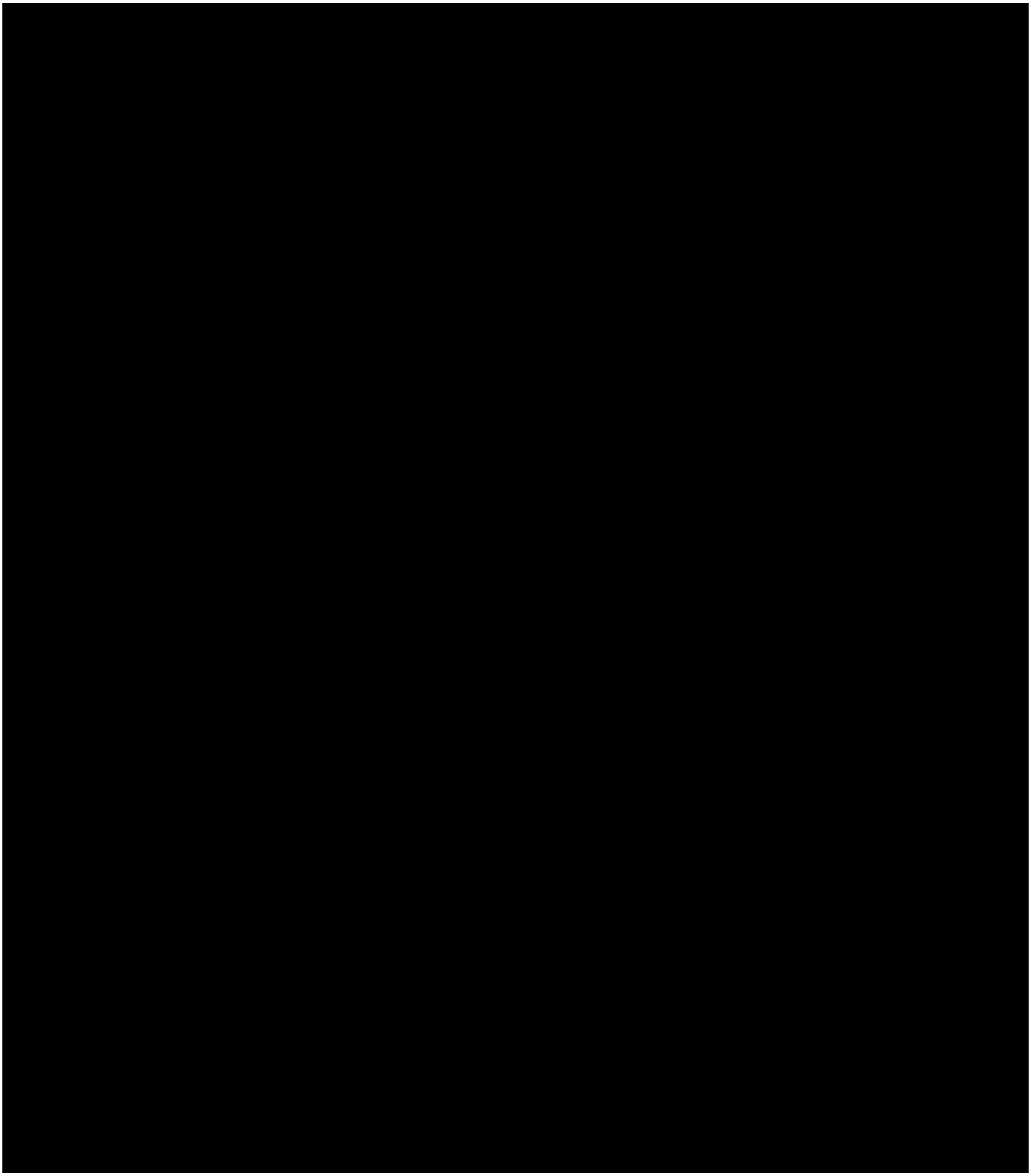


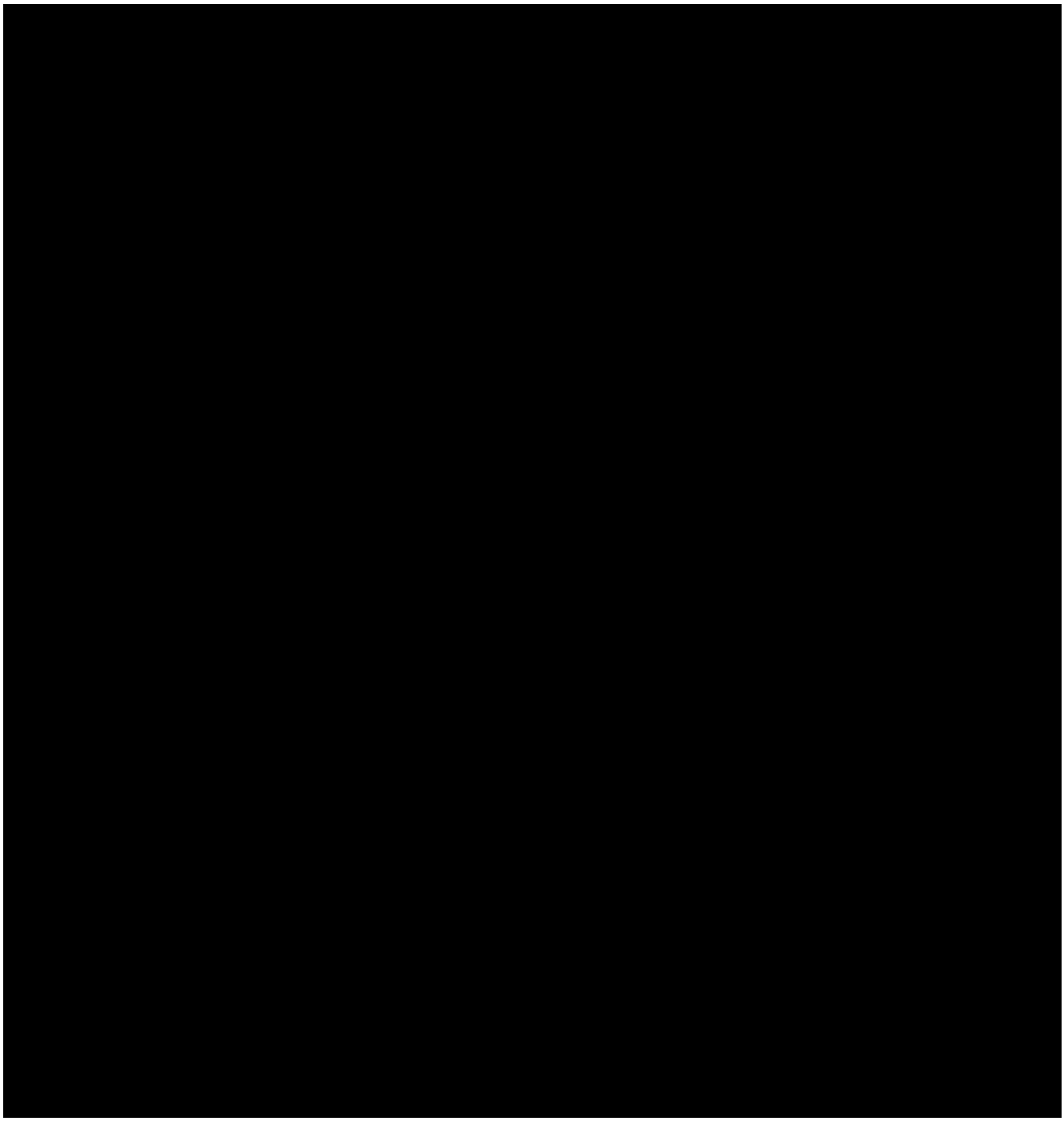


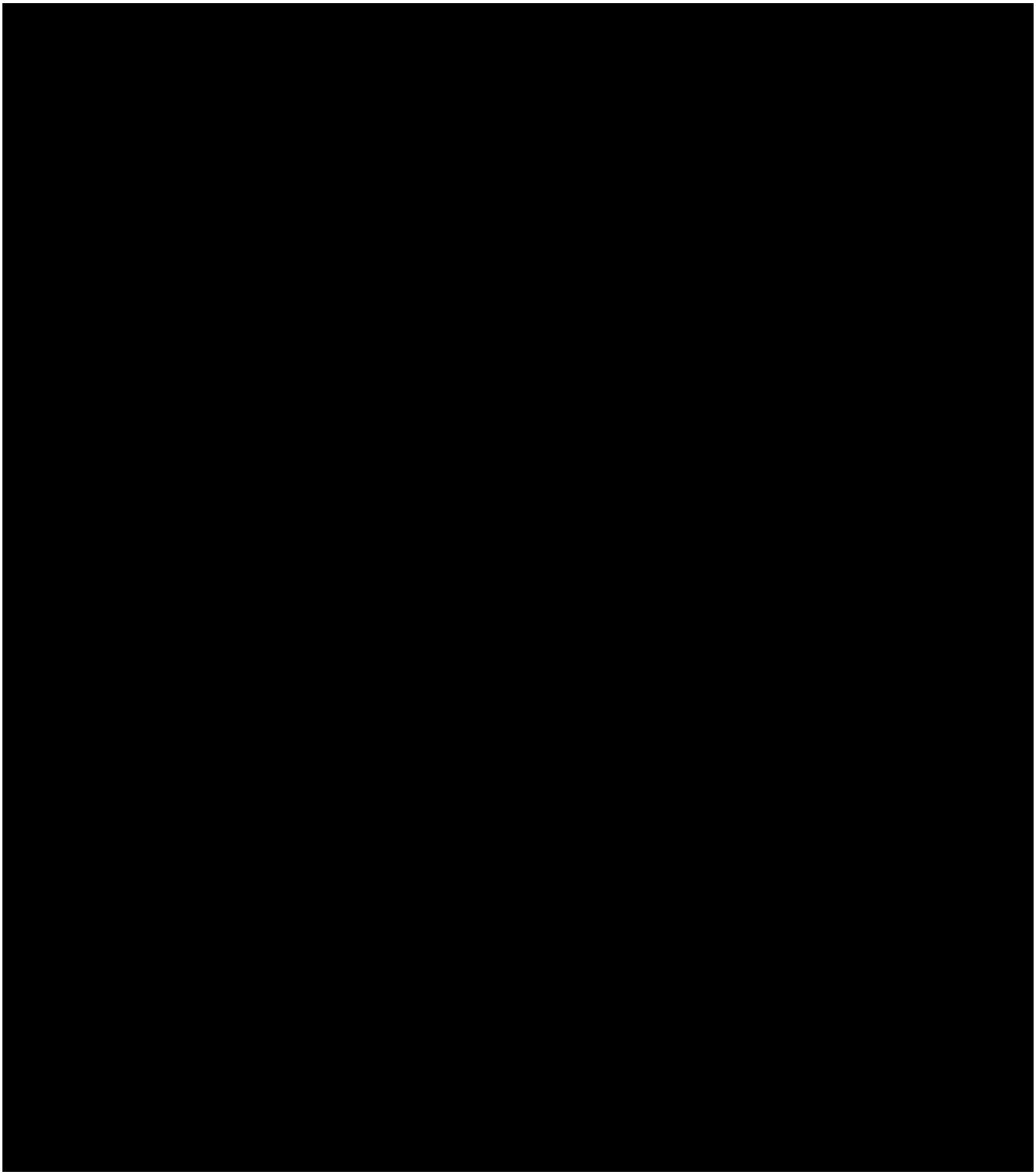


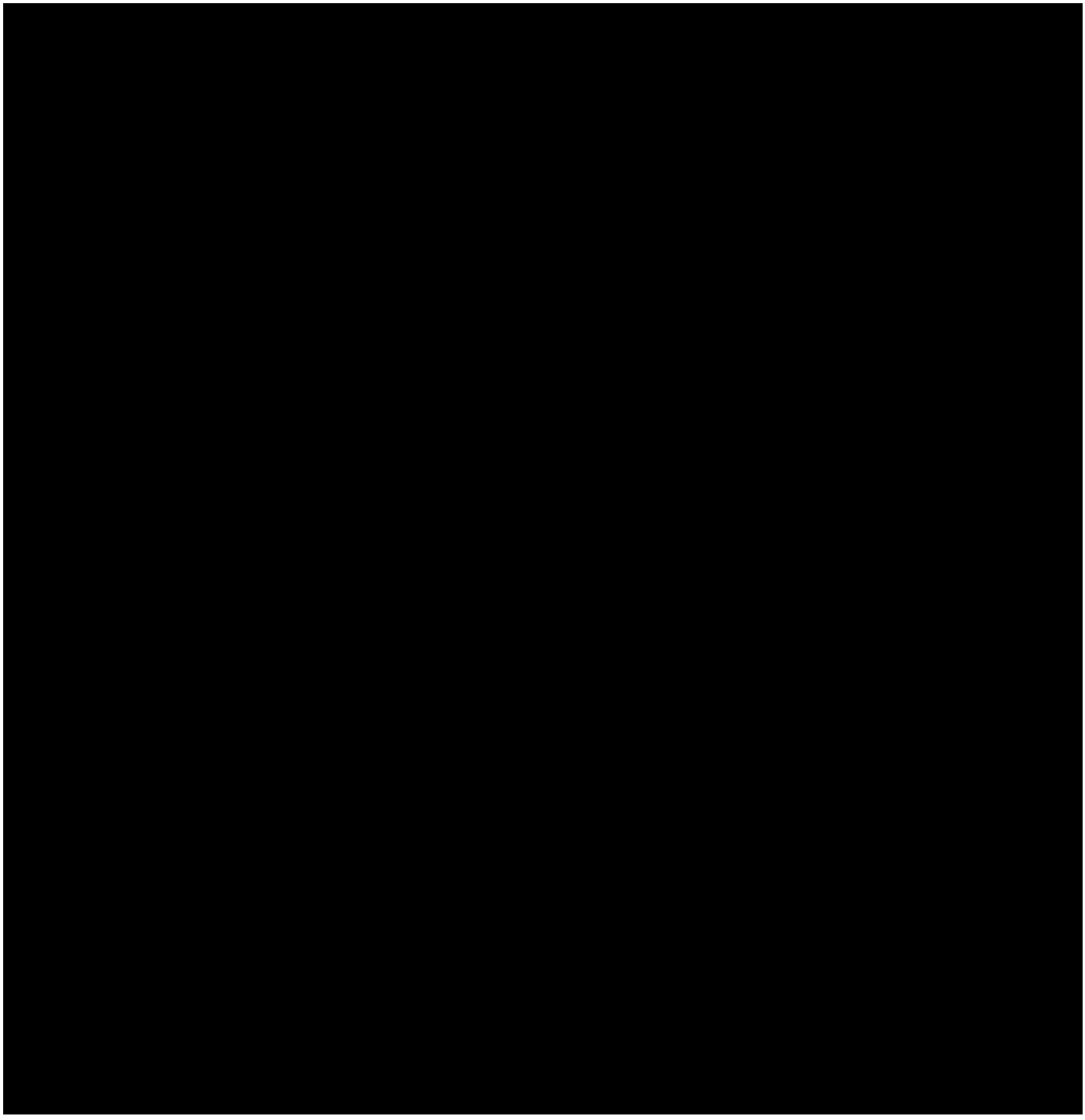


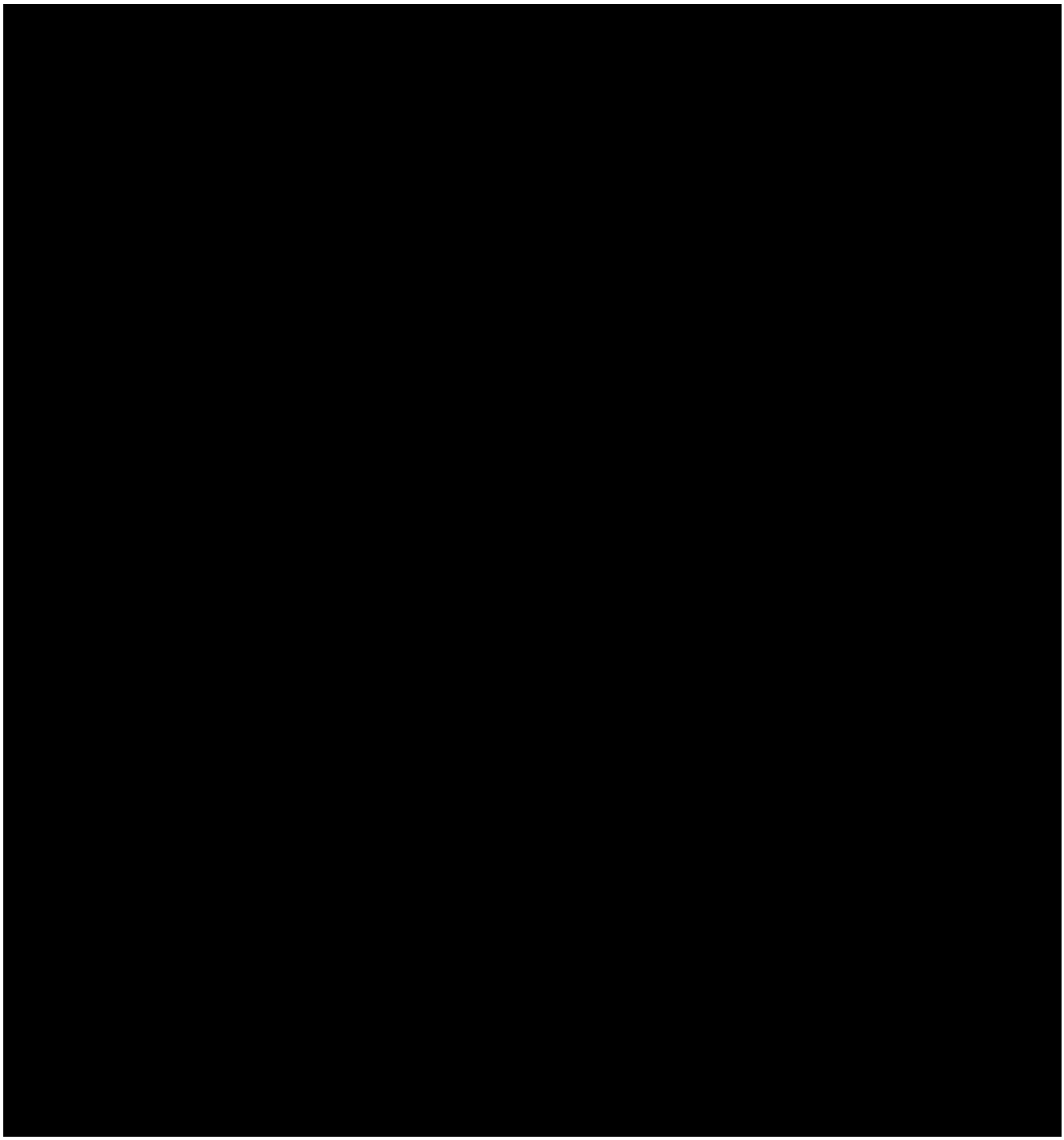


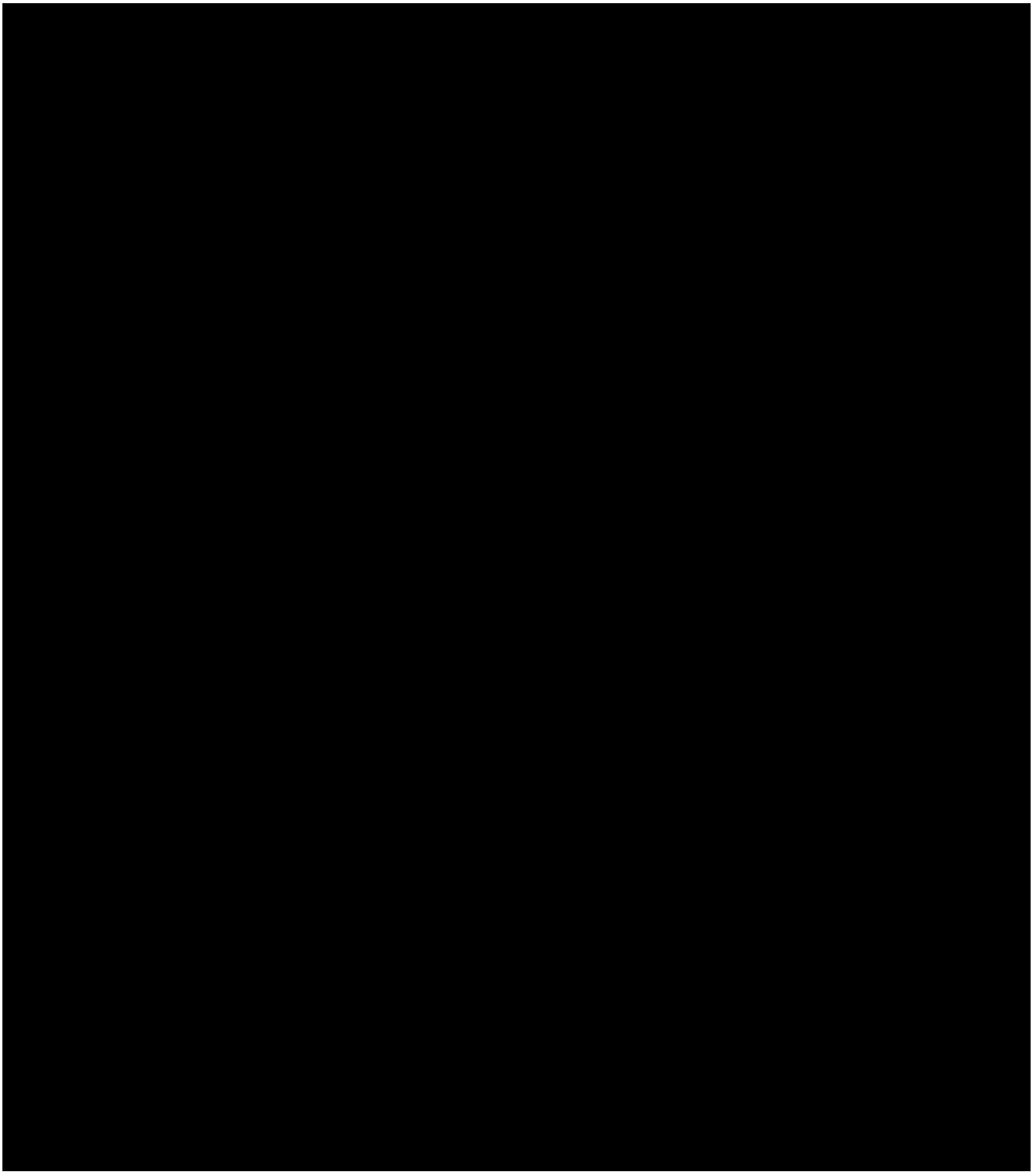


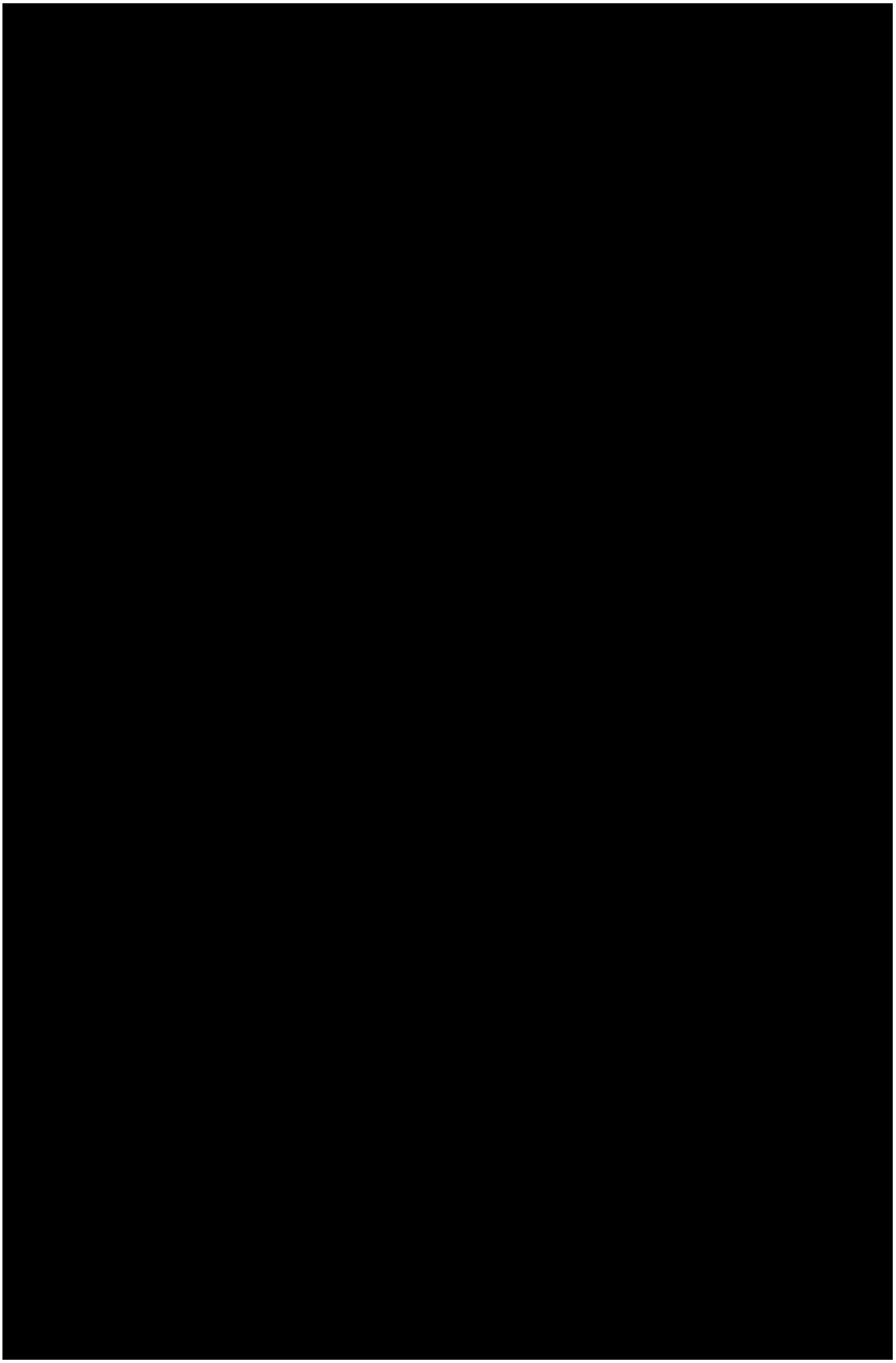


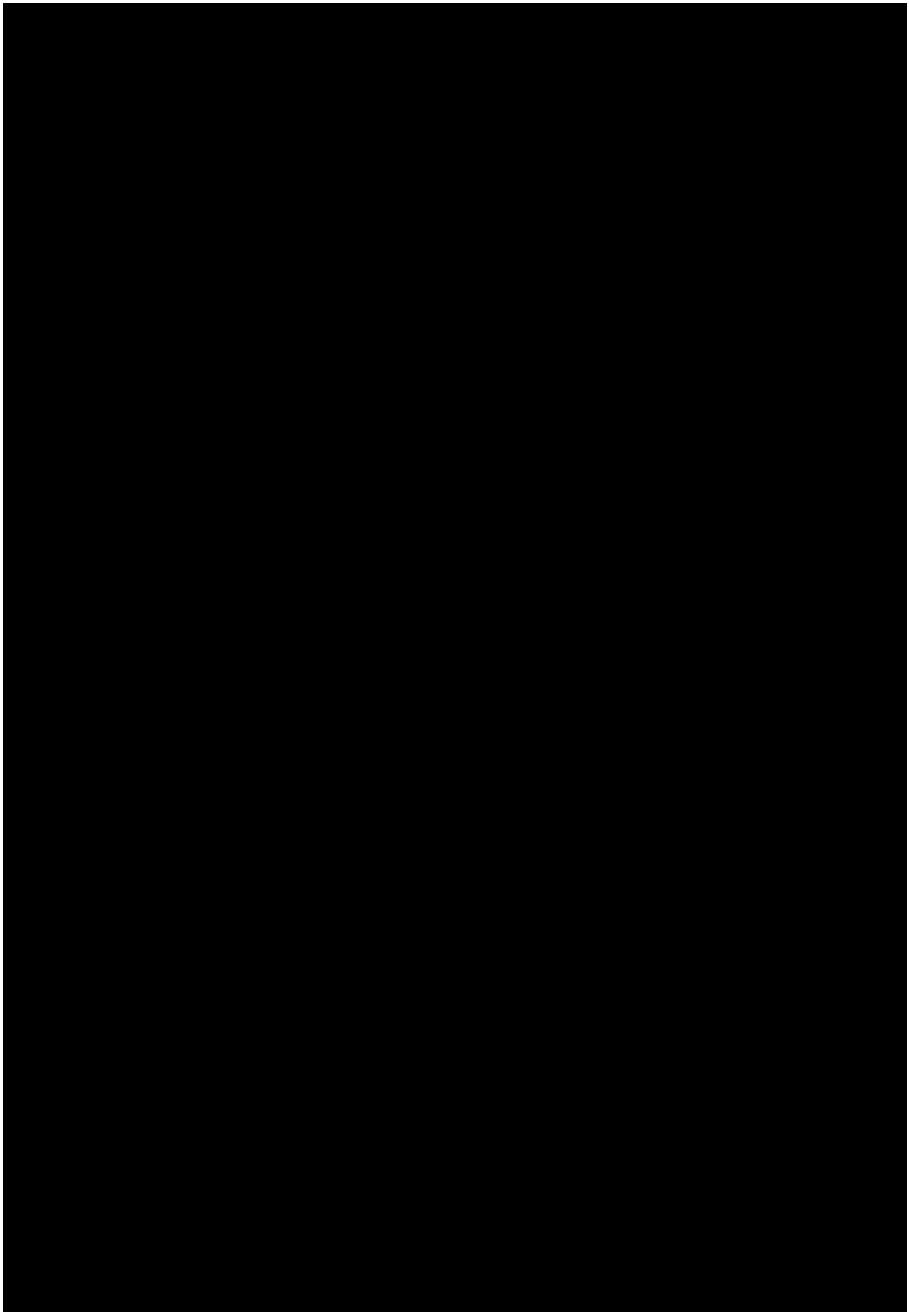












Wildflower Upstate New York Interest Form

Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.

Please fill out one form for each child.

Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.

[redacted]

* Indicates required question

Email *

Your email

Parent/Family/Legal Guardians First and Last Name *

Your answer

Parent/Family/Legal Guardians Phone Number *

Parent/Family/Legal Guardians Email Address *

Your answer

Parent/Family/Legal Guardians Full Street Address *

Your answer

Your child's first and last name *

Your answer

Child's birthdate *

Date

mm/dd/yyyy

Age your child will be in Fall 2026 *

Your answer

Current school your child attends (if any) *

Your answer

Primary language spoken at home *

Your answer

How did you hear about us? *

Your answer

What are your needs, hopes, and dreams for your child's perfect school? What would a perfect educational experience look/sound/feel like for your child? *

Your answer

What kind of role would you like to play in your child's school/education? *

Your answer

I would be open to a discovery interview in which Founder Courtney Murphy would contact me to learn more about the people most impacted by, and involved in, the educational experience of their children in our community. *

- ◯ Yes, feel free to contact me!
- ◯ No thanks, but keep me posted on the application process as time gets closer!

Gmail [redacted]

prospective Montessori micro-school in Ballston Spa

[redacted]

Hi Mayor Rossi,
My name is Courtney Murphy and I am a graduate of Ballston Spa Schools (2005) as well as a parent of 3 children who we're raising here in Ballston Spa. We specifically chose to move back to Ballston Spa once our oldest was school aged for the educational landscape both my husband (also a graduate of 2005) and I remember so fondly.

Our oldest attends Wood Road, and we are currently looking into options for our soon to be 3 year old. In looking at options in Ballston Spa, I felt something we benefited from for our oldest was missing here: Montessori programming that is accessible to all families. We sent our oldest to Little Ones Montessori in Schenectady from age 3-5, and we'd love to send our other children to a Montessori program as well. However, the closest one is in Malta and it is private and unfortunately not accessible financially at this time for my family.

I am writing in hopes of scheduling a prospective meeting to propose and (hopefully!) garner support for a future endeavor which was inspired by my own family's experience in our early childhood education search. My team and I have partnered with Wildflower Schools to open a Montessori micro-school in the Fall of 2026 in Ballston Spa. We will apply in April through SUNY Charter schools institute, in hopes that they will approve our first school- a micro-school- one classroom of mixed age group (ages 3-5) in the town I grew up in and moved back to!

Below are some links for you to explore the network my team is working with, as well as our social media pages:

- Wildflower Schools : This is the link to the network our team is working with. We will partner with them to apply through SUNY Charter Schools Institute in hopes of bringing our mission and vision to life- with our application materials due in April. We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

I'll leave you with our mission and vision, as I think it speaks best to our future hopes and dreams for not only my own children but other local families in Ballston Spa and surrounding areas.
Our mission at "*Ballston Spa Montessori*"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "*Ballston Spa Montessori*"* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.

**Name subject to change based on community collaboration and feedback*

I'd love to know if you are available to schedule a phone call to hear more. Part of our application process through SUNY requires letters of support, and as our Mayor I'd love to explain our curriculum and focus of our programming further to see if our mission aligns with your community vision for our village of friends!

[redacted]

Response 24-130

Frank Rossi Jr. <mayor@ballstonspa.gov> Wed, Feb 26, 12:00 PM

to me

Hi Courtney -

Out of curiosity, what location would you be considering? The reason I ask is because there is a common misconception of the boundaries of the actual Village vs. what people consider to be “Ballston Spa.” If it is outside the boundaries, then it would be appropriate to have the Town Supervisor of the appropriate town have a discussion with you. Once we iron out that, I’m happy to have a discussion. Thanks!

- Frank

[redacted]

Sent from my iPhone

[redacted]

Feb 26, 2025, 1:11 PM

Hello again,

Thank you so much for the speedy reply! I appreciate it. Although we wouldn't be slated to open until Fall of 2026, we have begun the prospective search for appropriate sq footage state requirements as well as gathering financial information on local properties which would meet the needs of the school. Since partnering with Wildflower Schools, we've learned a lot about micro-schools and their focus on community. The ideal location would be a small shopfront directly downtown- perhaps Front Street for example.

Our team believes shopfronts are ideal because they provide community-centered, accessible spaces that foster connection and visibility. Located in walkable areas, storefronts encourage collaboration with neighbors and businesses, creating a shared sense of ownership. Their design supports smaller, intimate learning environments, aligning with Wildflower's commitment to personalized, community-driven education. We envision our teachers and students utilizing all the community has to offer: walks to Wiswall park, the Brookside museum, the Ballston Spa library- to name a few. The idea of a shopfront isn't always literal- as some communities may lend itself to other offerings. For example, we also recently learned of the (unfortunate) closing of Kids First on Church Ave. This type of location while not a 'shopfront' is still a centrally located space which lends itself to the mentality of community driven schools.

I've attached information below from Wildflower's website describing one of their nine principles (shopfront settings) so you can understand further why our team values shopfronts as a possible future location:

A Shopfront Setting: ***A neighborhood-nested school committed to working in partnership with the surrounding community to create an environment that is healthier for children***

Wildflower schools sit in street-facing and accessible, light-filled spaces on walkable streets and invite community members visually into the daily work of children. They increase the presence of children and families in the community, **as more** narrow geographic focus supports walking to and from school, and by relying on public playgrounds, gardens and other civic spaces that would otherwise be on-site in larger institutions. We expand our definition of “stakeholders” beyond the families we serve directly, and we work to make our surrounding communities stronger and healthier for children.

Let me know if you would be best to speak to or if you have a recommendation on who else may be open to discussion! Thank you for your help.

Courtney

Frank Rossi Jr. Feb 26, 2025, 4:40 PM
to me

Hi Again Courtney -

Currently our zoning forbids schools from being placed in our Central Business District and our Commercial District. Any schools in such zones are considered pre-existing, non-conforming uses, but new schools would not be able to located there under existing zoning laws. Remember that we are working on revising our zoning currently, so it might be worth it to get involved now if you disagree with this. The problem you'll encounter is the parking aspect of schools vs. parking availability issues in the CBD currently.

See the attached photo of the relevant page from our zoning code - the X means forbidden in that zone. If an SP were there, it would require a special use permit, which means it wouldn't be impossible, but it would have to be approved by our Zoning Board.

Hope this is helpful.

- Frank

1 of 1

205 Attachment 1

Courtney Soucy [redacted] Feb 26, 2025, 7:59 PM
to Frank

Hi again,

Thank you for your email and for sharing the zoning information with me. I appreciate the clarity on the current zoning laws and the potential challenges around parking in the Central Business District. I was unaware to be honest that Ballston Spa was working on zoning revisions- how might I get involved with these efforts?

I wanted to clarify that we are still in the application phase for our school and, at this stage, we are primarily focused on gauging interest and support from community members. While we are exploring the concept of a shopfront as an ideal location, our focus is more on the mentality behind that space—centralized and easily accessible, with proximity to public spaces such as parks and libraries. We are not tied to a specific location but are open to finding a space that best serves our community's needs and obviously meets lawful zoning requirements in the district!

We will certainly keep an eye on the zoning revisions. Looking forward to hearing how I can get involved. Are you able to hear more about our goals of the program in order to gather some feedback from you and any other interested local elected officials? Let me know if this is a possibility! Thanks again.

Courtney

•••

Frank Rossi Jr. Feb 26, 2025, 8:03 PM
to me

Public involvement will resume likely in early April. Please watch our website for more information about the next public session and to review the draft of the code when it is released. That won't be the final code - the Board of Trustees will still need to review it at that time for some period of time, with a public hearing to be part of it.

- Frank

[redacted]

Courtney Soucy [redacted]
to Frank

Feb 26, 2025, 8:10 PM

Thank you! Will keep April in mind.
Are you able to schedule some time to talk further? I have availability anytime Monday, Wednesday, or Thursday from 9-noon.
Courtney

Frank Rossi Jr.
to me

Feb 27, 2025, 10:47 AM

Hi Courtney -

I think I am open next Thursday, probably around 11am, if that works for you?

- Frank

[redacted]

Courtney Soucy [redacted]
to Frank

Feb 27, 2025, 10:51 AM

Hi there,
Yes. 11am is perfect. Looking forward to sharing more information about the school in hopes of gathering initial thoughts, feedback, and potentially a letter of support in this endeavor. Talk to you then.
Courtney

Courtney Soucy [redacted]
to Frank

Mar 7, 2025, 8:00 AM

Hi again Mayor Rossi,

I sincerely appreciate you taking the time to speak with me and for your willingness to hear from a community member about our efforts to bring an innovative pre-K and kindergarten option to Ballston Spa. It was great to be able to share our team's vision, and I'm grateful for your insights especially around future zoning for schools within our village.

As mentioned during our conversation, I'm providing a copy of our informational slides for your review. I hope they offer a clear overview of our goals and the positive impact this initiative could have on our community. In the future, I would love the opportunity to present a full presentation to the board in order to go over the slide deck in person- with hopes of gathering letters of support from our elected officials. Letters of support from elected officials can play a crucial role in helping to bring a charter school to fruition by demonstrating community backing, political will, and alignment with local educational priorities. These letters can help strengthen a charter application by showing that the school has the support of key stakeholders- not just the prospective interested families I mentioned previously.

Thank you again for your time and consideration. I look forward to staying in touch and working together to expand opportunities for families in Ballston Spa.

Courtney Murphy

One attachment • Scanned by Gmail

[redacted]

Hi again Mayor Rossi,

I wanted to touch base about the potential for you to provide a letter of support for our endeavors at Wildflower Upstate New York. Part of our application suggests uploading letters of support from local families, businesses, and elected officials. As I mentioned before, this would show we have community support in hopes of bringing the first tuition free Montessori program to upstate New York, as all others are private. Let me know if you have questions about this request, I'd be happy to share further.

Courtney

•••

C **Courtney Soucy** <courtneysoucy@gmail.com> Mar 22, 2025, 9:35 AM (8 days ago)
to Frank

Hi Mayor Rossi,
I'm hoping to touch base again regarding our proposed school. We are gathering our final letters of support this week, and just received an email from Assemblywoman Marybeth Walsh. Support from elected officials shows our authorizers (SUNY) that we care deeply about educational choice and furthering the educational landscape in Ballston Spa with a groundbreaking addition of a tuition free Montessori charter school.
Please let me know if you have further questions or would like to discuss anything further. We appreciate your time and consideration.
Courtney Murphy

•••

F **Frank Rossi Jr.** Mar 22, 2025, 10:53 AM (8 days ago)
to Trustee, me

Hi Courtney -

Apologies for the delayed response — I was in Budget hell this week and up finally coming up to the surface for some air.

I did circulate your materials a couple weeks back to our Board, and there was only limited response back. One question that was asked was about whether or not the School District has shown any level of support for your project (either tacit or more formal). I haven't been able to reach out to Superintendent Duca to ask him myself, so I'll ask you while I have you in this email whether there has been that outreach and discussion. Thanks for any feedback you can provide, and have a great weekend!

- Frank

[redacted]

C **Courtney Soucy** <courtneysoucy@gmail.com> Mar 22, 2025, 6:28 PM (8 days ago)
to Frank, Trustee

Hi there,
Thanks for your reply. I did reach out to the board of ed. Part of SUNY CSI's next steps once we apply in April will be that they are obligated to alert the school district where we propose our school be, and so I wanted to get ahead of that and be transparent with Dr. Duca and the rest of our district team regarding our proposal. I've attached his email reply. I wrote back to him, as I believe he thought our school was solely a UPK based on our email exchange. He named they do not do letters for UPK, and so I clarified that it is a mixed age group that includes a UPK option, in hopes of expanding across 5 years to be a pre k and elementary program of 100 students, thus creating a 'micro-school' with the intentions of staying small, and remaining small. I am hoping after clarifying further what our goals and intentions are that Dr. Duca and I can speak again about gathering a letter of support from the board of ed.

I'll be in communication with him again soon in hopes of adding to our growing list of letters-similar to our assemblywoman, our prospective families, educators in the area, and Montessori school owners/directors. Our team hopes that this may include you and/or other board members, so I ask if a letter of support from you is a possibility or if it won't be possible at this time. Thank you for the ongoing communication regardless!

Courtney

•••

[redacted]

F **Frank Rossi Jr.** Mar 26, 2025, 7:15 PM (4 days ago)
to me, Trustee

Courtney - Thanks for your transparency. I want to reach out to Superintendent Duca concerning this tomorrow and will get back to you quickly.

- Frank

[redacted]

Micro-Classroom Montessori School

Inbox ×

Frank Rossi Jr.
to me, Trustee, Trustee, Trustee, Trustee, Karla

Thu, Mar 27, 11:00 AM (3 days ago)

Courtney -

Thank you for taking the time to introduce us to the concept of the Micro-Classroom Montessori School you're proposing opening in our area. I love your passion behind helping educate our area children, which I know is shared by so many teachers and administrators in our existing schools in and around the Village.

I know you had hoped for a letter of support from me, as Mayor of the Village of Ballston Spa, but after several internal discussions and after speaking with Superintendent Duca of the Ballston Spa Central School District, we remain concerned about the message it would send to the area currently. As you probably know, due to a shrinkage in bed numbers of School District students, the BSCSD's budget has been cut in a way that has led to major cuts of staffing — and further reductions in bed counts could continue those issues. For as much as your school might be a job creator, it would likely lead to deeper cuts in the School District, adversely affecting Village residents that work at the various schools. As such, that's the tough balance here. In addition, the BSCSD contributes toward the Village's Public Library — funding that is crucial to keep those operations alive every year. A reduction in bed count could also adversely affect the amount we receive annually, forcing us to raise property taxes more than what we already are proposing.

On a brighter note, though, we do see some opportunities for a balance to be struck in the education system locally, with the over 500 residential units at Mill Town Centre on the horizon (which will be part of the BSCSD), and with potential opportunities with our new zoning code for the defunct Angelica and Maplewood Manor sites to be redeveloped as mixed-use or multi-family style properties. Those represent terrific opportunities, if they come to fruition, for growth that everyone can benefit from, including your endeavor.

In summary, our Board of Trustees is generally supportive of your end goals, but I cannot write an explicit letter of support when there are legitimate concerns about the potential negative effects your school could have in the near term on a School District we rely on locally. As Dr. Duca stated to both you and me, he is happy to work with you with UPK opportunities down the line if you do progress with your school — and similarly, if you get the school off the ground inside the Village, we will of course embrace your passion and would support everyone affiliated with it like we do with every other school or business in our community. Please keep us posted on your status as things develop, and I'm always happy to provide thoughts on any issues you might encounter along the way.

Again, we wish you nothing but the best in your journey to make this school a reality — it reflects a group of folks with a true passion in the betterment of youth that impressed me from the first day we spoke.

- Frank

[redacted]

Courtney Soucy [redacted]
to Frank

Sat, Mar 29, 3:27 PM (1 day ago)

Mayor Rossi,

Thank you for taking the time to discuss our Montessori micro-school proposal both through phone calls and emails and for sharing your perspective on the potential impact on Ballston Spa Central School District (BSCSD) and the Village. I appreciate the opportunity to address concerns and reinforce our commitment to collaboration as we move forward in the application process.

I understand the concerns surrounding enrollment shifts and budget implications. We took deep care in our financial budgeting to ensure that we add to the educational landscape without becoming a detriment to the already great program BSCSD has to offer in our local elementary schools- the schools my husband and I moved back to Ballston Spa to send our first grader to (who is enrolled at Wood Road, right next to where I went- Milton Terrace!). By creating a micro-school model, based on our projections, the financial impact on BSCSD would be negligible given that per-pupil funding is estimated between $13,000 and $14,000 for charter tuition in BSCSD. In our first year, maintaining our goal of creating a micro-school with 20 students enrolled, the impact would be approximately 0.24% of BSCSD's $107.18 million budget (based on the budget for the 2024-2025 school year). At full enrollment (120 students), this would represent approximately 1.46% of the district's total budget (again only based on this year's budget- subject to change year to year). Being a charter school, not all students would necessarily come from BSCSD, minimizing our impact as well. With 70 current interest forms and 20 letters of support for our inaugural class of 20 seats, we predict we'll need to hold a lottery process for enrollment if/when SUNY was to approve us. Introducing the only tuition-free Montessori program in not just the capital region but all of upstate New York would likely attract families from surrounding districts, mitigating concerns about reducing BSCSD's student population.

Beyond enrollment and funding, in our micro-school staffing plan our goal would be to hire two teachers per classroom, with a projected total staff in year 5 (full build out) of 12 teachers, and 6 teachers assistants (if we maintain our co-taught model), adding additional employment opportunities within our village. I appreciate Superintendent Duca's willingness to explore potential UPK partnerships in the future, and we welcome further discussions on how we can work alongside BSCSD rather than in competition with it as UPK waitlists were a point of concern with nearly all families we've spoken to. We hope to provide this unique micro-school model for all interested families pre k-6th grade, specifically for families of students with disabilities. We will utilize set-asides in our enrollment for up to 20% of our classroom makeups for this purpose. While BSCSD schools are a space I spent many years subbing in while getting my Masters-I saw first hand the care many teachers put into their programs for students with disabilities. However, the schools themselves are quite large in terms of enrollment size- and our program offers a unique alternate choice for families who may want a smaller setting.

We recognize the importance of open communication and transparency, and we will continue to engage with local leaders, community organizations, and district officials throughout the application process. Our goal remains to collaborate, share best practices, and serve as a resource for families while supporting local initiatives, particularly in special education and experiential learning. Additionally, in the future we would love the opportunity to present Montessori's curriculum approach to both BSCSD's Board of Education and the Village Board to further clarify how our educational philosophy aligns with community and district wants and needs- to continue our goal of spreading our curriculum model to local elected officials, boards, and community members alike.

Thank you again for the well wishes, as well as the thoughtful consideration of our school. Our team appreciates your time and engagement, and we look forward to staying in touch.

Best,
Courtney Murphy

future partnership inquiry

Inbox ×

Courtney Soucy [redacted]
to nora

Wed, Feb 19, 10:29 PM

Hi Nora,

My name is Courtney Murphy and I am a resident of Ballston Spa with my husband and three children. I am a former Scottie myself, raised in Ballston Spa, and recently moved back to the area to ensure my kids could grow up in the same little village I grew up in and loved! In thinking through partnerships, both my husband and I discussed our love of sports having spent our younger years on many BARC soccer and t-ball teams! I am writing in hopes of discussing a future partnership opportunity between BARC and my latest endeavor.

I am currently applying through NYS SUNY Charter Schools Institute to start a free Montessori micro-school in Ballston Spa! Our goal is to open in Fall of 2026. I am partnering with Wildflower Schools which I have linked their social media here if you are interested in learning more about them: Wildflower Schools Instagram.

I am currently working through some community outreach in hopes of discussing partnerships for our future programming. I like to lead our conversations with our mission. After reading your bio on the BARC website, I have no doubt that your expertise and experience mentioned aligns with our mission and vision. Lastly, Ballston Spa Montessori is a placeholder name for our future school name which will be influenced by our teacher leaders and community:

Our mission at "*Ballston Spa Montessori*"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "*Ballston Spa Montessori*"* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.

**Name subject to change*

If this is of interest to you I'd love to hop on a phone call to discuss my journey through this application process and what the future of our partnership with BARC could look like. Please let me know when you may be able to discuss! Thank you.

Courtney Murphy
[redacted]

[redacted]
to me

Thu, Feb 20, 10:55 AM

Hi Courtney-

This sounds like a very intriguing idea and I would be interested to see where you felt BARC might fit in. But before setting up a phone call, I've had many organizations reach out over the years about partnerships, and it's usually to utilize the building. The building & fields are school property & the building is not to code. This means that no school programming can occur here and that any outside organizations who want to utilize it for community events need to get permission from the school district. However, if you have a different idea of a partnership, I'd love to talk further. I look forward to hearing from you.

Warm regards,
Nora
Nora Bisnett
[redacted]

Courtney Soucy [redacted]
to nora

Thu, Feb 20, 2:35 PM

Hi Nora,
Thanks for the reply! I didn't actually have interest in utilizing the building or fields. It would more so be to discuss the possibility of BARC representatives (for example, I thought of perhaps the arts or sports program coordinators/employees) partnering with us for a monthly visit to our school. For example, having Christine Bouchard (name I saw on the website) join our students to teach printmaking one day, and each month having some type of rotation wherein community members join our classroom.
Part of our goal is to truly invest in the community we live in and will one day have our school located in. This would mean encouraging our families to sign up for BARC programs of course- but I'd also love to gauge interest in having visitors to our classroom so that students may experience all BARC has to offer both outside and within their classroom. We are slated to open in Fall 2026, so we have more than enough time to consider what a partnership might look like.

Is this something you'd like to further brainstorm with me? Let me know! I look forward to your thoughts.
Courtney

[redacted]
to me

Thu, Feb 20, 3:02 PM

Wonderful idea! I'd love to talk to you more about it so you have a better idea of our services as it sounds like our services are very similar to what you are proposing. For example Chris is our Assistant Director. This means she oversees many programs. One such responsibility is that she is the program coordinator of our art sessions, but she has no art background. She coordinates the hiring & scheduling of art instructors as well as handling parent interaction and the day to day of running of that program. Her specialty is actually special education & soccer coaching. My other Assistant Director, Ryan Cummings runs several programs here as well, and has a background in multiple athletics which include baseball (a pitching coach) and hockey. In the past we've had staff with extensive experience in theater and dance as well. In general, we recruit 'specialists' in the modality we are focusing on (volleyball, basketball, swim, track, tennis, dance, theater, tae kwon do, etc) for a particular session & Ryan and Chris oversee the day to day running of the program.

Maybe we could set up a time to chat in the few weeks if that works.

Courtney Soucy [redacted]
to nora

Thu, Feb 20, 3:48 PM

Hi there,
Thanks so much for explaining! I'd love to hop on a phone call as soon as you're available to discuss a possible partnership and also seek any feedback you may be able to give as a community member. Since we aren't slated to open until 2026, we are working to gather feedback on our current mission/vision from community partners and families. I'm also excited to see if a possible monthly BARC visit could work on both our ends.

I am pretty flexible with my schedule. Do you have any availability tomorrow between 1:30-2:30pm perhaps?
Courtney

BARC Nora Bisnett
to me

Thu, Feb 20, 4:13 PM

I'm not typically in the office Fridays. I could Monday at 2 if that works.

Nora Bisnett
[redacted]

Courtney Soucy [redacted]
to Nora

Thu, Feb 20, 4:26 PM

That works great for me! Talk to you then, my number is at the end of my email!
Courtney Murphy
[redacted]

Hi Nora,

I hope you're doing well, and thank you for hearing about our team's vision for our future school on our phone call earlier today! It was great connecting with a "Ballston Spa Lifer." I'm excited to bring more early childhood education options to our community. I'm exploring potential locations, including the old Benedict Health Center (where my mom worked!) and Hope Church, and will also reach out to Front St Home. I really appreciate your suggestions! I wouldn't have known any of them were available without someone within the community like you mentioning it!

I'm excited to partner on this and would love to eventually bring a BARC presence into the school, possibly through art or sports partnerships with kindergarten students. I was a little disheartened to hear the enrichment program isn't necessarily running as often as it used to in our local elementary schools, and I would love to brainstorm ways in which we can partner to have an ongoing program in each season with our 5 year olds (and in the future younger ones too!) I love the idea of incorporating mindfulness, the arts, and sports- as all of these things were very present for my youth in Bspa!

Below are some links for you to explore the network my team is working with, as well as our social media pages:

- Wildflower Schools : This is the link to the network our team is working with. We will partner with them to apply through SUNY Charter Schools Institute in hopes of bringing our mission and vision to life- with our application materials due in April. We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook Give us a follow to help spread the word!

As I mentioned, we are hoping to gather letters of support from members of the community who believe in our mission and vision which was presented in our first email exchange. BARC's endorsement in the form of a letter of support would make a tremendous impact and help demonstrate the community's commitment to providing children and families in the area with further options for prek and kindergarten programs! SUNY Charter Schools Institute will want to see letters of support that are specific to a proposed school vs. generic letters of school choice support. If our conversation wasn't enough to provide enough context for why I personally believe our school will have an impact on our community/if you would like to connect further to dive deeper into our programming, I'd be happy to do so!

If you're willing to write a brief letter of support, I'd be so appreciative. I truly appreciate your time and consideration,

Courtney Murphy

[redacted]

•••

N [redacted] Tue, Feb 25, 11:28 AM

to me

It was a pleasure speaking with you as well. I will bring this to my board in March to get approval for a letter of support.

I just want to reiterate that Front Street Home is just a rumor around town. Something to keep an eye on but I am unsure how valid it is. ☺

Phone call today? Inbox ×

C **Courtney Soucy** [redacted] Thu, Feb 20, 10:37 AM

to julia.duff

Hi Julia,
My husband made me aware that we actually have met before at the gala in 2023! I'd love to hop on a call today at 4pm if possible?
Courtney Murphy
[redacted]

Julia Duff Thu, Feb 20, 11:09 AM

to me

Sounds great, I will call you then!

Julia Duff
Executive Director
[redacted]

Courtney Soucy [redacted]
to Julia

Thu, Feb 20, 10:28 PM

Hi Julia!
Thank you so much for checking in about my latest adventure in education. Here are some further details I wanted you to be able to reference in writing so that you may pass along the info to anyone you think might be interested in possible board governance for our future public Montessori micro-school, slated to open in Fall 2026. I am partnering with Wildflower Schools which I have linked their social media here if you are interested in learning more about them: Wildflower Schools Instagram.

In recruiting folks for the board I am hoping our draft of our mission and vision summarizes our thoughts on what the school can be for our community. I am hoping to recruit Board members who have a passion for and/or fit the following criteria:

- Educating all students
- the inclusion revolution
- have awareness of and/or lived experience with people with disabilities (parents especially)
- adults with disabilities themselves who can speak to their educational experience
- are dedicated to speaking up for what's best for children and their families, even when it's tough
- have board governance experience (*doesn't need to be the case, but doesn't hurt!)
- have fundraising and/or grant writing experience
- Believe in and are invested in the following mission/vision:

Our mission at "*Ballston Spa Montessori*™* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "*Ballston Spa Montessori*™* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.
**Name subject to change*

I am currently seeking board members in a range of areas of expertise. The time commitment will vary based on the phases of opening our school, with a low end estimate and high end estimate in the following chart. Please pass this information along to whom you think may be interested, as I know time is so valuable and we would like folks who are able to commit. We seek the following positions.

Board Member description	Skillset:	Low end hours per month:	High end hours per month:	Duties
Board Chair	Leadership, Governance, Strategic Planning, Meeting Facilitation	5	15	Leads the board; sets meeting agendas; facilitates meetings; coordinates with the school leader; ensures board responsibilities are met; oversees annual board assessments and planning.
Board Member (General)	Leadership, Communication, Strategic Planning, Diverse Expertise	4	10	Attends all board meetings; participates in at least one committee; contributes to decision-making and strategic planning; supports the school's mission and goals; engages in community outreach.
Treasurer	Financial Management, Accounting, Budgeting, Compliance	5	10	Oversees reporting, audits, and compliance; ensures financial transparency

I know you asked about the official 'sign on' time frame, so I will be sure to reach out to my connection at Wildflower as well as SUNY Charter School Institute (our future authorizer) to ensure no conflict of interest exists with folks who may be on your board but terming out. I'll get back to you tomorrow with that information!

Thanks again for our phone call. I appreciate it and look forward to collaborating with SBANY's in multiple capacities in the future!
Courtney

Courtney Soucy [redacted]
to Julia

Fri, Feb 21, 1:34 PM

Hi again,
To answer your inquiry around board governance- there would be no conflict of interest so long as there are no "for profit" efforts between a representative on your current board who seeks to join ours. Folks can hold multiple board positions at once- we just need to ensure they aren't, for example- seeking to make a profit between SBANY'S and our school- which were not!

I hope this answers your question. As of now, our application would be due in April- so anyone interested in joining our board would need to sign on and submit official documents. We would still be in an application phase through October- with (hopefully) approval beginning in November and thus us starting our "year zero" of planning, slated to open Fall 2026.

Julia Duff Fri, Feb 28, 10:39 AM
to me

Thank you, Courtney.

Just for clarity, the conflict for me is more so because I would be redirecting resources (in-kind volunteering, donations, fundraising) to another agency instead of ours, and that goes against my job. The Board would be very confused lol!

But, I am planning on sending this to our Board members rolling off in 2026 because I do still think that this is a good fit for a lot of them!

Thank you!

Julia Duff
Executive Director
Spina Bifida Association of New York State
[redacted]

[redacted]

Subject: Re: Phone call today?

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Courtney Soucy <courtneysoucy@gmail.com> Fri, Feb 28, 10:42 AM
to Julia

Hi again,
Thank you for clarifying and I totally understand. On my end, I'm not necessarily looking for your board members to join my board- just wanted to know if anyone involved in the SBANYS organization is interested in board governance as an advocate in the disability community. Do you know anyone who is NOT on your board who might be interested in board governance for our future school?

Also, do you know when you may be able to share the info with the members ending their term? Our application is due April 8, so I would need folks to "sign on" as part of our application naming they are interested in future board governance.

Thanks again for your help this far!
Courtney Murphy
[redacted]

> On Feb 28, 2025, at 10:39AM, Julia Duff <julia.duff@sbanys.org> wrote:
>
> •••

Julia Duff Feb 28, 2025, 10:46 AM
to me

Hi,

That totally makes sense. I will think more on that - my Board came to mind because I would be comfortable almost recommending them because I have seen the amazing work they do!

The board got the email today. I will keep you posted if I connect with others.

I think I already asked, but if they want more information can I share your email?

Julia Duff
Executive Director
Spina Bifida Association of New York State

Courtney Soucy [redacted]
to Julia

Feb 28, 2025, 11:05 AM

Hi again,
Absolutely please send anyone my email address. In addition here are some links that may help folks determine if this may be of interest to them:

- Wildflower Schools : This is the link to the network our team is working with. We will partner with them to apply through SUNY Charter Schools Institute in hopes of bringing our mission and vision to life- with our application materials due in April. We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook Give us a follow to help spread the word!
- Wildflower Upstate NY board member: the linked in job description for our future board!

Courtney

Julia Duff
to me

Feb 28, 2025, 1:48 PM

Perfect, thanks!

Julia Duff
Executive Director
Spina Bifida Association of New York State
[redacted]

Courtney Soucy [redacted]
to Julia

Mar 11, 2025, 10:29 AM

Hi Julia,
Touching base as our deadline for our application is due the first week of April. Do you know of anyone involved SBANY's who may be interested in joining the board? If they are to join, we would need to have them participate in a welcome meeting as well as have their name officially in our application documents- so I'd like to have that done to present to SUNY prior.

If not in time for the deadline, we of course will welcome future members after if interest is there- we would just love to show SUNY we are invested in creating a board that reflects the world we liv in and that includes disability advocates (as you know of course!) Thank you for your help thus far!

Courtney

Julia Duff
to me

Mar 13, 2025, 1:23 PM

Hi,

I shared it with folks I thought would be interested, but did not hear back that anyone was interested.

I am sorry I could not be of more help here!

Julia Duff

[redacted]
to Julia

Absolutely no worries- appreciate you even reaching out!

Would you be willing to offer a letter of support? SUNY asks that we speak to local business owners, elected officials, families, and other related organizations to determine communit support. Let me know if this is something you may be able to do.
Courtney

•••

Julia Duff Mar 14, 2025, 9:47 AM
to me

Yes!

Do you have a template?

Julia Duff
Executive Director
Spina Bifida Association of New York State
[redacted]

From: Courtney Soucy [redacted]
Sent: Thursday, March 13, 2025 1:37 PM

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Courtney Soucy [redacted] Mar 14, 2025, 10:16 AM
to Julia

Sure thing. I've utilized chat gpt to draft a letter of support. Feel free to adjust it how you see fit. Appreciate it! If you could email back by March 21 that is helpful.

Courtney Souc [redacted] Wed, Feb 19, 10:14 PM
to SMcKinley

Hi there,
My name is Courtney Murphy and I am a former educator turned stay at home mom who was born and raised here in Ballston Spa. I recently moved back 'home' to our little village this past October with my husband and our three children. I noticed in your bio on the website you graduated from Manhattanville, small world- so did I! I graduated in 2009, eventually moved from Bspa- spent time teaching in Harlem, and then moved back upstate during COVID.
I wanted to write to share an exciting endeavor I have planned for the upcoming year. I have partnered with Wildflower Schools to bring a free Montessori micro-school to our community, with the goal of opening in the Fall of 2026. I am hoping to speak to someone about the possibility of partnering with the BACC to encourage our families to utilize the many resources within our community such as the community center. My youngest sister had the opportunity to attend the BACC both for before/after school care as well as their summer program in later years and we remember it fondly. Our hope is that we encourage our families to become more aware of all the things Ballston Spa has to offer whether it be a fun time at open gym, or a first Friday drop off!
I look forward to checking in about this possible partnership and what it may look like one day in the near future. Feel free to contact me here or through my phone number at the end of this email!
Courtney Murphy
[redacted]

Courtney Soucy [redacted] Mon, Mar 3, 7:47 PM
to SMcKinley

Hi there!
Looking to see if you had any time to review the former email and if you could possibly hop on a phone call to hear more soon. Hope to hear back!
Courtney Murphy
[redacted]

> On Feb 19, 2025, at 10:14 PM, Courtney Soucy [redacted]
>
>

•••

Sarah McKinley Tue, Mar 4, 6:30 PM
to me

Hi,
I apologize for the delay. I received your email during our winter break and meant to respond and it slipped my mind. I would love to connect to hear more about it. I am busy tomorrow with teaching and meetings but could talk on Thursday. Would 1:00 work?
Thanks,
Sarah

Courtney Soucy [redacted] Tue, Mar 4, 6:47 PM

to Sarah

That should work! So my phone call is actually two fold: 1- I am going to open a school in fall 2026, but 2- before then I'd love to hear more about BACCs offerings as I have an almost 3 year old! Looking forward to our call Thursday! Should I call the number listed at the end of your email?

Courtney Murphy

[redacted]

On Mar 4, 2025, at 6:30 PM, Sarah McKinley [redacted]

Sarah McKinley Tue, Mar 4, 6:50 PM

to me

You can call my cell phone. [redacted]

I'm looking forward our call.

Sarah McKinley

[redacted]

From: Courtney Soucy [redacted]

Sent: Tuesday, March 4, 2025 6:47 PM

community partnership discussion Inbox ×

Courtney Soucy [redacted] Wed, Feb 19, 10:05 PM

to balweb

Hi there,

My name is Courtney Murphy. I am a Scottie who graduated from Ballston Spa High School in 2005, who recently moved back to Ballston Spa for the sole purpose of having my children raised in this community which I grew up in and loved so much.

I am writing in hopes to speak with a library representative about my latest endeavor. I have partnered with Wildflower Schools to open a free public Montessori micro-school in our community. Our goal is to open in the Fall of 2026 with our first primary classroom, a mixed age group of 3 to 5 year olds in our little village of Ballston Spa.

One of the goals of our school is to stay small and embed ourselves within the community- part of which would clearly involve time spent hopefully visiting our local library in the future! I am hoping to collaborate with the library to instill a love of our villages central hub- the local library is a space I visited from a young age with my mother, the grandma to my children who now takes them to storytime there (at the BACC for now during construction!)

I am excited at the opportunity to hopefully partner in the future, and look forward to speaking to whom you think would be the best fit to discuss this with. Please feel free to forward this email to whomever would be best to discuss this with.

Courtney Murphy

[redacted]

Simmons,Andrea <[redacted] Thu, Feb 20, 4:08 PM

to me

Hi Courtney,

Thank you for reaching out! This sounds like an exciting endeavor. I'd be happy to collaborate with you whenever you're ready. I look forward to your response.

Best,

Andrea Simmons

[redacted]

Courtney Soucy [redacted]
to balweb, Andrea

Wed, Mar 12, 3:09 PM

Hi Andrea,
Since our initial email we've gathered a lot of community interest but I want to make sure I connect with the library again. As a vital hub for literacy, learning, and family engagement, the library plays a key role in early childhood development, and we believe our efforts align with your mission of promoting lifelong learning and accessibility for all families. My daughter and niece currently attend storytime with Maryann (I graduated with her son! Small world) and we absolutely love it!

As mentioned in prior communication: our team is working to establish a tuition-free, public Montessori charter microschool, providing families with an additional UPK 4 and early elementary option. Currently, the only Montessori programs in Upstate New York are private, making them inaccessible to many families. Our school would offer a hands-on, exploratory learning environment, fostering independence, creativity, and curiosity, while ensuring education remains accessible to all, regardless of financial means.

We greatly value the role of the library as a community hub for early literacy and education and recognize the overlapping goals of our work. Public libraries and Montessori education both emphasize child-led exploration, curiosity-driven learning, and equitable access to knowledge. As we continue our application process with SUNY Charter Schools Institute, we are seeking letters of support from community leaders like you to help demonstrate the need for additional high-quality early learning options in Ballston Spa. A letter of support from the library would be incredibly meaningful in showing our authorizers that key community institutions share a common goal of expanding educational access for young learners.

I have attached an informational slideshow in PDF format, along with some links below that provide further insight into our vision:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

If you're interested in providing a letter of support, I can follow up with certain requirements that our authorizers mention. Looking forward to connecting further.

Courtney and the Wildflower Upstate New York Team

•••

One attachment • Scanned by Gmail

[redacted]

BACC Meeting

Inbox ×

Meghan Mensler [redacted]
to me

Fri, Mar 14, 11:02 AM

Hello Courtney,

I am reaching out on behalf of or Team here at the BACC-
Thank you so much for reaching out, and that is truly exciting news to hear that your Montessori School will be joining our Community! Welcome.

I would love to find a time, maybe next week if you're available, to discuss a possible partnership more – and what role BACC could play in this community outreach/connectedness goal.
It's always amazing to hear that you know someone close to you who has participated in programming here, I have been here for almost 8 years now and our Center is a very special place.
One of our FY2025 and beyond goals, is to focus on bringing recreation and social/educational programming back to all ages in our community!

Let me know what times might work best for you next week, and we can set up a phone call to talk more.

Thank you so much,

Meghan

[redacted]

Amy Madden (via Google Docs) [redacted]
to me

Thu, Mar 20, 12:18 PM (10 days ago)

Amy Madden shared a document

Amy Madden [redacted] has invited you to **view** the following document:

Hello Courtney,

Thank you for sharing information on the school you are founding! What valuable addition to our community! I'm happy to provide a letter of support for your en devour. Please keep us posted on your progress, we're excited to see this get set in motion.

Best,
Mary Beth Walsh
[redacted]

Wildflower School

Courtney Murphy [redacted]
to EIAdmin

Tue, Mar 4, 10:35 PM

Hello,

I hope this email finds you well. My name is Courtney Murphy, and I am a Ballston Spa resident and a parent to a daughter who benefits from Early Intervention services. I have seen firsthand the incredible impact that early support can have on a child's development, and this in part- along with my past experience as a special education teacher-has inspired me to take action in my own community.

I am currently in the application phase to open a public charter school- a Montessori microschool specifically-with a strong focus on inclusion. The goal is to open in Fall of 2026 with a class of mixed age children ages 3-5. Our mission is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where every child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that every student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

As we move forward with this initiative, we are actively seeking partnerships with organizations that share our commitment to accessibility and inclusion. I am hoping to discuss our vision further with EI of Saratoga County so that I may be able to partner in regards to family outreach and interest. As a charter school, we operate admission on a lottery- however- in NYS we are able to do 'set asides'- that is, reserve a certain number of seats for special reasoning. For our school, since we are unapologetically inclusive by design- we will specifically be setting aside seats for students with disabilities, ensuring that all children, regardless of their needs, have access to a high-quality, inclusive education. Too often, Montessori is out of reach financially for families. By opening a public charter school we provide a free option to families who are interested in an innovative approach to learning.

My own daughter is about to age out of early intervention. Her next big step will be finding a school to help her thrive while simultaneously supporting her diverse needs. I am hoping that we might be able to partner for future families like mine- on the cusp of finishing up early intervention and looking for pre-k/kindergarten options that are designed with their children in mind! I would greatly appreciate the opportunity to connect and discuss how we might work together to support families in Saratoga County. Please let me know if there is a time that would be convenient to speak. Further information about our network as well as our social media pages can be found below:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook Give us a follow to help spread the word!

Looking forward to your thoughts and hoping to connect soon.

Courtney Murphy

seeking support for proposed Montessori school

Courthey Murphy [redacted]
to rwm2008

Wed, Mar 5, 11:22 AM

Hello Roots and Wings Montessori team,

I hope this email finds you well. My name is Courtney Murphy and I am part of a dedicated team working to bring a **tuition-free public Montessori charter school** to the Ballston Spa community. Our goal is to expand access to high-quality Montessori education, ensuring that more children, regardless of financial background, can benefit from this transformative approach to learning.

As a respected Montessori school in the capital region, your voice carries great weight in advocating for the value of Montessori education. A letter of support from your school would be invaluable in demonstrating the demand and impact of Montessori in the public sector. Your endorsement would strengthen our efforts to bring this vision to life and help us make Montessori accessible to more families.

We have gathered the following information about our future Montessori micro-school, slated to open in Fall 2026 with a primary classroom to start. Below is some further information about our proposed school:

- Wildflower Schools : This is the link to the network our team is working with. We will partner with them as I mentioned to apply through SUNY Charter Schools Institute in hopes of bringing our mission and vision to life- with our application materials due in April. We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook Give us a follow to help spread the word!
- We are also seeking board members. If you know of any Montessorians who would like to potentially serve on our board, please feel free to share our information here: Wildflower Upstate NY board member

Thank you for your time and consideration—we greatly appreciate all that you do to advance Montessori education. If you are open to providing a letter of support to SUNY for our application, please let me know if you'd like to schedule a call to discuss what this may look like and how it helps us!

Courtney and the Wildflower Upstate NY team

Courthey Murphy [redacted]
to SMcKinley

Wed, Mar 12, 2:51 PM

Hi Sarah,

Thank you for our brief phone call today to go over some of the highlights of our current endeavor to bring a tuition free Montessori program to Ballston Spa. Like you, I am deeply committed to expanding high-quality educational opportunities for families in Ballston Spa. Our team is working diligently to establish a tuition-free, public Montessori charter microschool that would provide families with an additional UPK 4 and early elementary option in our community.

Currently, the only Montessori programs in Upstate New York are private, limiting accessibility for many families. In our outreach, parents have expressed a strong demand for more early childhood education options, as many programs already have long waitlists—for example, as early as February of this year, Little Achievers had 45 families on their list for Fall 2025. Our goal is to offer another high-quality choice that embraces hands-on, exploratory learning, fostering independence, creativity, and curiosity, while ensuring that education remains accessible to all, regardless of financial means. As a small, community-driven microschool, we would begin with 20 students in our first year, growing gradually to ensure sustainability without disrupting BSCSD's K-12 programs.

We recognize and deeply respect the role of community hubs and providers like BACC in offering valuable early learning opportunities for local families. Like you, we are committed to expanding access to early childhood education and ensuring that all students have learning environments that best suit their needs. As we continue our application process with SUNY Charter Schools Institute, we are seeking letters of support from key community leaders and early education providers to demonstrate the need for additional high-quality early learning options in Ballston Spa. A letter of support from BACC would be invaluable in showing our authorizers that community partners recognize and support the expansion of early education options like the one we are proposing.

I have attached an informational slideshow in PDF format, along with some links below that provide further insight into our vision:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

If BACC is interested in providing a letter of support, I can follow up with certain requirements they mention. Looking forward to connecting further.

Courtney and the Wildflower Upstate New York Team

One attachment • Scanned by Gmail

[redacted]

Courthey Murphy [redacted]
to boe@bscsd.org

Wed, Mar 5, 3:09 PM

To whom it may concern:

I hope this email finds you well. My name is Courtney Murphy, and I am a former graduate of BSHS and recently moved our family (my husband- also a graduate- and our three children) back to Ballston Spa to raise them in the community we grew up in and loved! I am currently a stay at home mom who is also part of a dedicated team working to bring a tuition-free public Montessori charter microschool to the Ballston Spa community. Our goal is to expand school choice and increase UPK 4 options by introducing an innovative, inclusive Montessori program. Currently, the only Montessori programming in upstate NY are independent schools.

Our vision aligns closely with BSCSD BOE's 2024-2025 goals of Diversity, Equity, Inclusion, and Belonging by offering a student-centered, developmentally appropriate learning environment that welcomes all children, regardless of background or financial means. As a small, community-driven microschool, we will begin with around 20 students in our first year, growing gradually by approximately 20 students per year over five years. This intentional, small-scale growth ensures we do not divert significant funding from BSCSD's K-12 programs while providing families with an additional high-quality educational choice. Our oldest daughter is currently attending Wood Road- we love BSCSD schools and it is the main reason we chose to live and raise our family here.

In our community outreach with families, many have expressed a strong need for more options in early childhood education-as waitlists are a big part of our conversations. Particularly, families express wanting a school that embraces hands-on, exploratory learning and honors children's natural development. We would present another option for UPK 4's in our area. A public Montessori school would fill this gap, fostering independence, creativity, and a deep sense of belonging—values that directly support BSCSD's commitment to inclusive, equitable education.

As our board of education members, your support would be invaluable in demonstrating the need for expanded Montessori access. We are currently partnering with Wildflower Schools and in the application phase of applying through SUNY Charter Schools Institute. Our application is due April 8 and we would be slated to open in Fall 2026. We write to you all in hopes we could share further information and determine if you would provide a letter of support in our endeavor. It would strengthen our efforts to bring this vision to life while reinforcing our shared commitment to a high quality education in our community.

Some further info about our future school are here:

- Wildflower Schools : This is the link to the network our team is working with. We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook These social media pages are how we've been interacting with local families who express interest in our school model.
- We are also in the process of solidifying our board. This is the link to the job description our current board members applied through: Wildflower Upstate NY board member

I would love the opportunity to discuss this further with the board and provide any additional information you may be curious about. Please let me know a convenient time to connect. Thank you for your time and consideration—I appreciate your dedication to expanding educational opportunities for our students.

Looking forward to hearing from you,
Courtney Murphy
[redacted]

seeking support: proposed public Montessori charter micro-school

Courthey Murphy [redacted]

Wed, Mar 12, 8:12 PM

To whom it may concern,

I hope this email finds you well. My name is Courtney Murphy and I am a former special education teacher, later assistant principal, turned stay at home mom this past year. I learned of NYSMA through Amy Klein, director of RiverRun Montessori in Schenectady, NY. She has been an amazing thought partner throughout an endeavor I've been on this past year. I am reaching out share an exciting initiative we are working on in Ballston Spa—the establishment of a tuition-free, public charter in the form of an authentic Montessori micro-school. We are writing to request you support in demonstrating the need for more accessible, high-quality Montessori education in our community.

Our team is preparing to submit an application in April to the SUNY Charter Schools Institute to bring a public, Montessori micro-school to our region, ensuring that all children, including those with disabilities and diverse learning needs, have access to a student-centered, developmentally appropriate education. We strongly believe that our mission aligns with your goal of advancing and protecting the educational vision of Dr. Maria Montessori in both private and public schools. However, what we've noticed is too often- many Montessori schools are inaccessible to families of lower socio-economic status given all the current authentic Montessori schools in the Capital region are private. By making an authentic Montessori education tuition-free and accessible, we seek to expand educational equity while upholding Montessori principles in a public setting.

A letter of support from your organization would be invaluable in demonstrating to our authorizers that the Montessori community recognizes and supports this effort. Your endorsement would reinforce the importance of expanding access to Montessori education in the public sector while preserving the integrity and fidelity of the Montessori method.

I would love the opportunity to discuss this initiative further and answer any questions you may have. If you are open to providing a letter of support, I would be happy to provide additional details what it may look like.

In the meantime, I've attached an informational slideshow in PDF format, along with links below to help paint a clearer picture of our school's vision:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

I would love the opportunity to discuss any questions you may have and your thoughts on providing a letter of support. Thank you for your time and for your ongoing commitment to advancing Montessori education.

Looking forward to hearing from you,

Courtney and the Wildflower Upstate New York team

seeking support: proposed Montessori charter micro-school

Inbox ×

Courtney Murphy [redacted]
to KFleming

Wed, Mar 12, 2:46 PM

Hello Principal Fleming,

I hope this email finds you well. My name is Courtney Murphy, and my husband and I, both graduates of Ballston Spa High School, recently moved back to raise our three children in the community we love. Like you, I am deeply committed to expanding high-quality educational opportunities for families in Ballston Spa. With that mission in mind, I am part of a team working to establish a tuition-free, public Montessori charter microschool that would provide families with an additional UPK 4 and early elementary option in our community.

Currently, the only Montessori programs in Upstate New York are private, making them inaccessible to many families. In our outreach, parents have expressed a strong demand for more early childhood education options, as many programs already have long waitlists—for example, as early as February of this year Little Achievers already has 45 families on their list for Fall 2025. Our goal is to offer another high-quality choice that embraces hands-on, exploratory learning, fostering independence and creativity while ensuring that education remains accessible to all, regardless of financial means. As a small, community-driven microschool, we would begin with 20 students in our first year, growing gradually to ensure sustainability without disrupting BSCSD's K-12 programs.

We recognize and deeply respect the role of faith-based schools like yours in providing strong academic and values-based education in Ballston Spa. Like you, we believe in offering families meaningful choices in their children's education and ensuring that all students have access to learning environments that best suit their needs. As we continue our application process with SUNY Charter Schools Institute, we are seeking letters of support from community leaders and fellow educators to demonstrate the need and enthusiasm for expanded educational options in our area. A letter of support from St. Mary's would be invaluable in reinforcing our shared commitment to serving families and broadening access to early childhood education.

I have attached an informational slideshow in pdf format, as well as some links below that might be of help to paint the picture of our schools vision:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

I would love the opportunity to connect and share more details if you're interested, and thank you for your time and dedication to strengthening education in our community.

Looking forward to hearing from you,
Courtney Murphy
[redacted]

Courtney Murphy [redacted]

Thu, Mar 13, 6:04 PM

Dear Hamad,

I hope you're doing well. Thank you so much for allowing me the opportunity to email. My name is Courtney Murphy and I am currently a stay at home mom (former special education teacher as well as assistant principal) working on a big endeavor I'd like to share more about as I believe it aligns with the work that you do. My team and I are working to apply for a charter through SUNY Charter Schools Institute to open a tuition free Montessori micro-school in the Fall of 2026 in Ballston Spa.

When our team began discussing who we may seek letters of support from- we began mentioning local elected officials, business owners, and obviously prospective families. However, we want to branch deeper in our reach to include prominent figures in our Capital region whose work we admire for its alignment with our vision for our school. With the work you do to advance equity in education, we believe your voice is essential in shaping a more inclusive and accessible learning environment for both staff and students. As we work toward launching our school, we are seeking letters of support from educational leaders like you who share our vision of equitable and inclusive student-centered learning.

Our school is designed to provide a high-quality Montessori education within a public charter framework, ensuring all children—regardless of background—have access to an individualized, hands-on, and holistic learning experience. Your expertise in DEI, program development, and community engagement aligns with our mission, and we would be honored to have your support. A letter in support of our efforts, expressing the importance of equitable access to diverse learning models like Montessori would help demonstrate the need for this school to SUNY authorizers. We are unapologetically putting forth a proposal that is inclusive in all aspects from prioritizing students with disabilities during enrollment (I'm a former special education teacher and now mom to a child with a disability) to ensuring our school is accessible to all community members- as all current Montessori options upstate are private.

In the meantime, I've attached an informational slideshow in PDF format, along with links below to help paint a clearer picture of our school's vision:

- Wildflower Schools : We partnered with Wildflower Schools because of their authentic Montessori model, community embedded classrooms, and focus on equity and inclusion. More specifically you can find exciting updates about Wildflower Schools in the school spotlight linked here.
- Wildflower Upstate New York: Our Instagram and Wildflower Upstate New York Facebook

I would love the opportunity to discuss any questions you may have and your thoughts on providing a letter of support. Thank you for your time and consideration.

Looking forward to your thoughts!

Best,

Courtney and the Wildflower Upstate New York team

James Tedisco Fri, Mar 14, 5:26 PM
to me

Hi Courtney, Thank you for reaching out to me and keeping me informed about your school plans. Unfortunately, due to the public officers law/ethics law our Senate legal counsel advised that I am precluded from writing a letter of support in situations like this. I wish you all the best in your endeavors.

Regards,
Senator Jim Tedisco

From: Courtney Murph[redacted]
Sent: Thursday, March 13, 2025 1:39 PM
To: James Tedisco <[redacted]
Subject: seeking support: proposed charter- Montessori public micro-school

> You don't often get email from wildflowerupstateny@gmail.com. Learn why this is important

...

[Message clipped] View entire message

Courtney Murphy <wildflowerupstateny@gmail.com> Fri, Mar 14, 9:01 PM
to James

Thank you for letting me know. We appreciate you getting back to us and understand.
Courtney and the Wildflower Upstate New York team

Katie Fleming Thu, Mar 13, 11:55 AM
to me

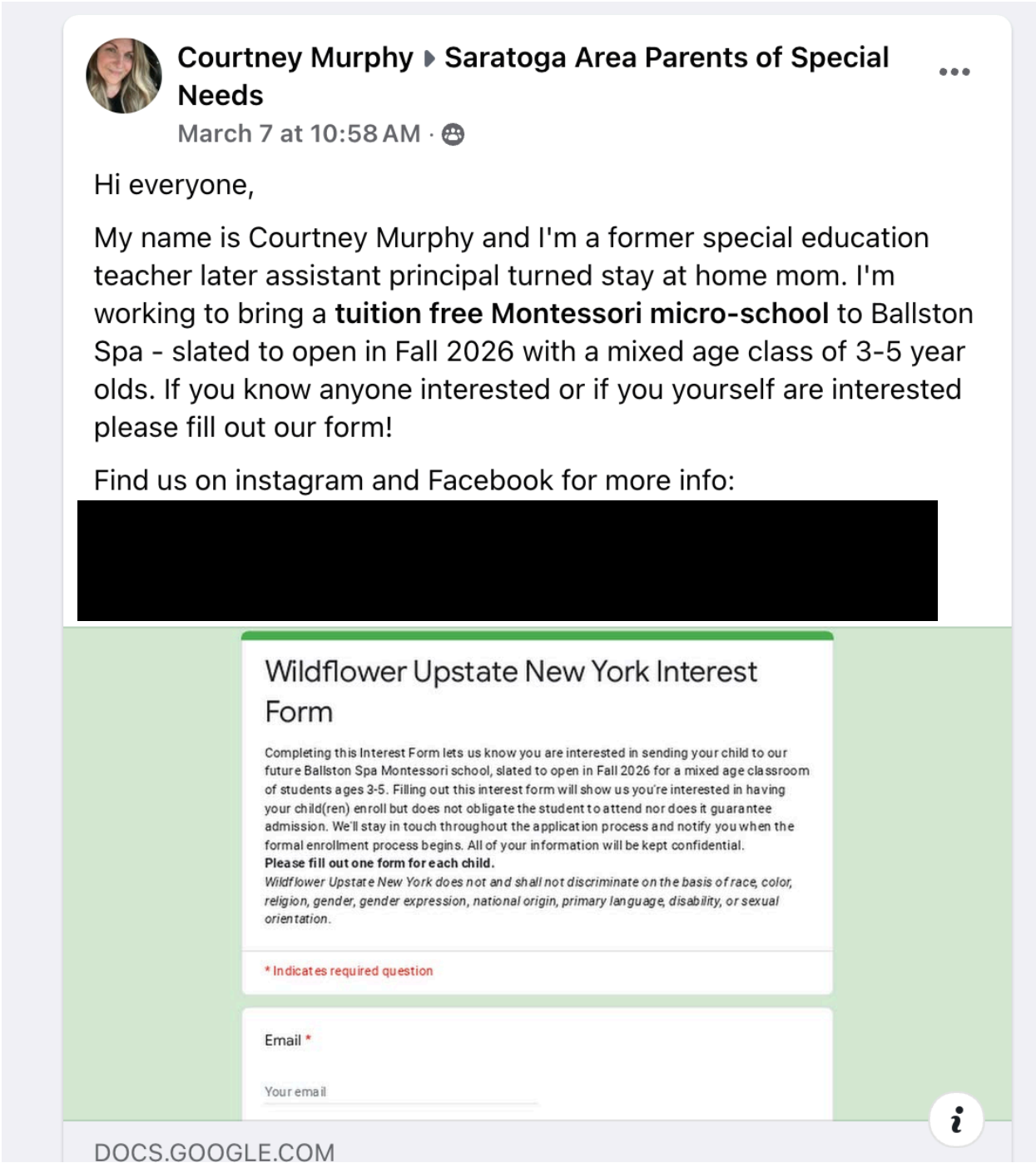
Good Morning Courtney and thank you for reading out to us. Welcome back to B-Spa a wonderful place to live and raise a family. I will take your request to our Board and let you know the outcome we meet at the end of the month. Best wishes Katie

--

Grace and Peace,
Katie Fleming
Principal
St. Mary's School
[redacted]
Learn Think Lead

Courtney Murphy [redacted] Thu, Mar 13, 1:29 PM
to Katie

Thank you for the welcome back! We're happy to be back.
Looking forward to hearing back, our team greatly appreciates it.
Courtney


Courtney Murphy ▸ Saratoga Area Parents of Special Needs
March 7 at 10:58 AM ·
Hi everyone,
My name is Courtney Murphy and I'm a former special education teacher later assistant principal turned stay at home mom. I'm working to bring a tuition free Montessori micro-school to Ballston Spa - slated to open in Fall 2026 with a mixed age class of 3-5 year olds. If you know anyone interested or if you yourself are interested please fill out our form!
Find us on instagram and Facebook for more info:
[redacted]
Wildflower Upstate New York Interest Form
Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.
Please fill out one form for each child.
Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.
* Indicates required question
Email *
Your email
DOCS.GOOGLE.COM

Courtney Murphy ▸ **518 Parents**

February 27 at 11:55 AM ·

Hi everyone! I'm Courtney- a graduate of Ballston Spa schools and now parent raising 3 little ones back in my hometown of Bspa! I am excited to share that my team and I are opening a Montessori micro-school (with our first classroom being a primary program- a mixed age classroom for ages 3-5) slated to open in the Fall of 2026.

I'm seeking feedback from local families to help co-create the school. Feel free to message me with further info or take a look at our facebook page here! We're also on Instagram @wildflowerupstateny

I'll share our mission and vision in hopes it may gauge your interest level:

Our mission at "*Ballston Spa Montessori*"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "*Ballston Spa Montessori*"* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.

**Name subject to change based on community collaboration and feedback*

[redacted]

Courtney Murphy ▸ **Upstate NY Moms**

March 10 at 9:58 PM ·

Hi everyone!

For those who didn't see my post a few days back I wanted to share some further info after many families had questions to clarify! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.

1. BC so many asked: I am starting a TUITION FREE public charter: a Montessori micro-school slated to open in Ballston Spa in Fall 2026.
2. We are definitely an inclusive setting and serve students with disabilities. It's been my life's work as a special ed teacher and now greater purpose as a parent of a daughter with spina bifida.

I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page @wildflowerupstateny on Instagram and facebook or have them fill out this interest form to connect with us

[redacted]

Courtney Murphy ▸ **Childcare in the capital region**
March 7 at 10:56 AM ·

Hi everyone,

My name is Courtney Murphy and I'm a former special education teacher later assistant principal turned stay at home mom. I'm working to bring a **tuition free Montessori micro-school** to Ballston Spa - slated to open in Fall 2026 with a mixed age class of 3-5 year olds. If you know anyone interested or if you yourself are interested please fill out our form!

Find us on instagram and Facebook for more info:

[redacted]

Wildflower Upstate New York Interest Form

Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.
Please fill out one form for each child.
Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.

* Indicates required question

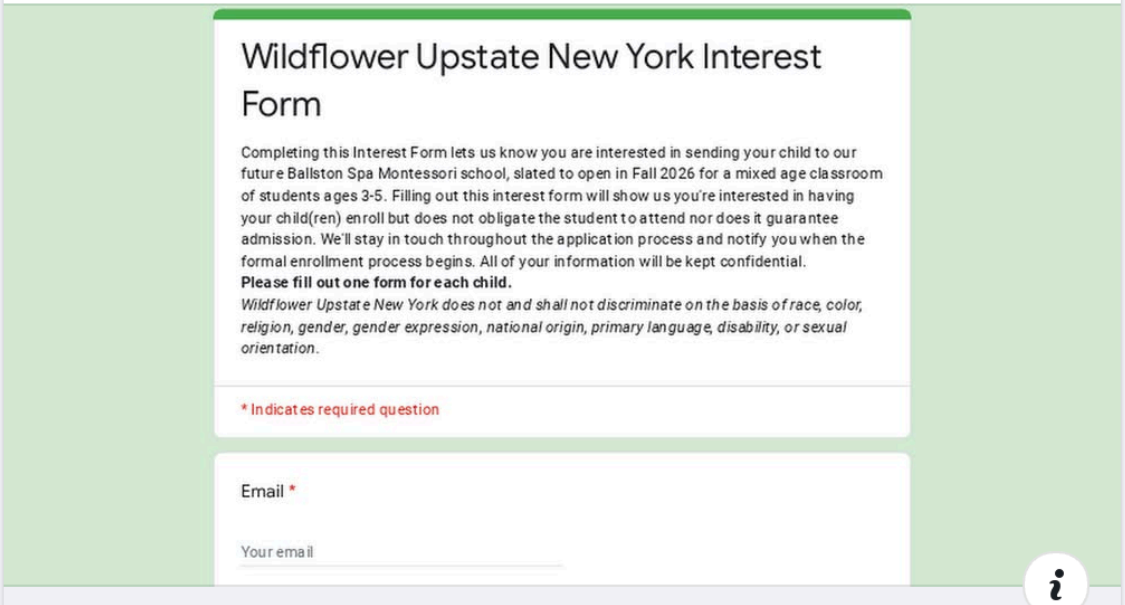
Email *

Your email

Courtney Murphy ▸ **Ballston Spa Moms Group - A Ministry of Community Alliance Church**

1h ·

Hi all! I'm starting a tuition free public Montessori micro-school in Ballston Spa and we need your help to make it a reality. If you know of anyone interested in being a prospective family- please share our interest form! It is in no way binding nor does it guarantee a seat- but it helps show our authorizers we have local interest. Give us a follow on Facebook/Instagram [redacted]



Wildflower Upstate New York Interest Form

Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.

Please fill out one form for each child.

Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.

* Indicates required question

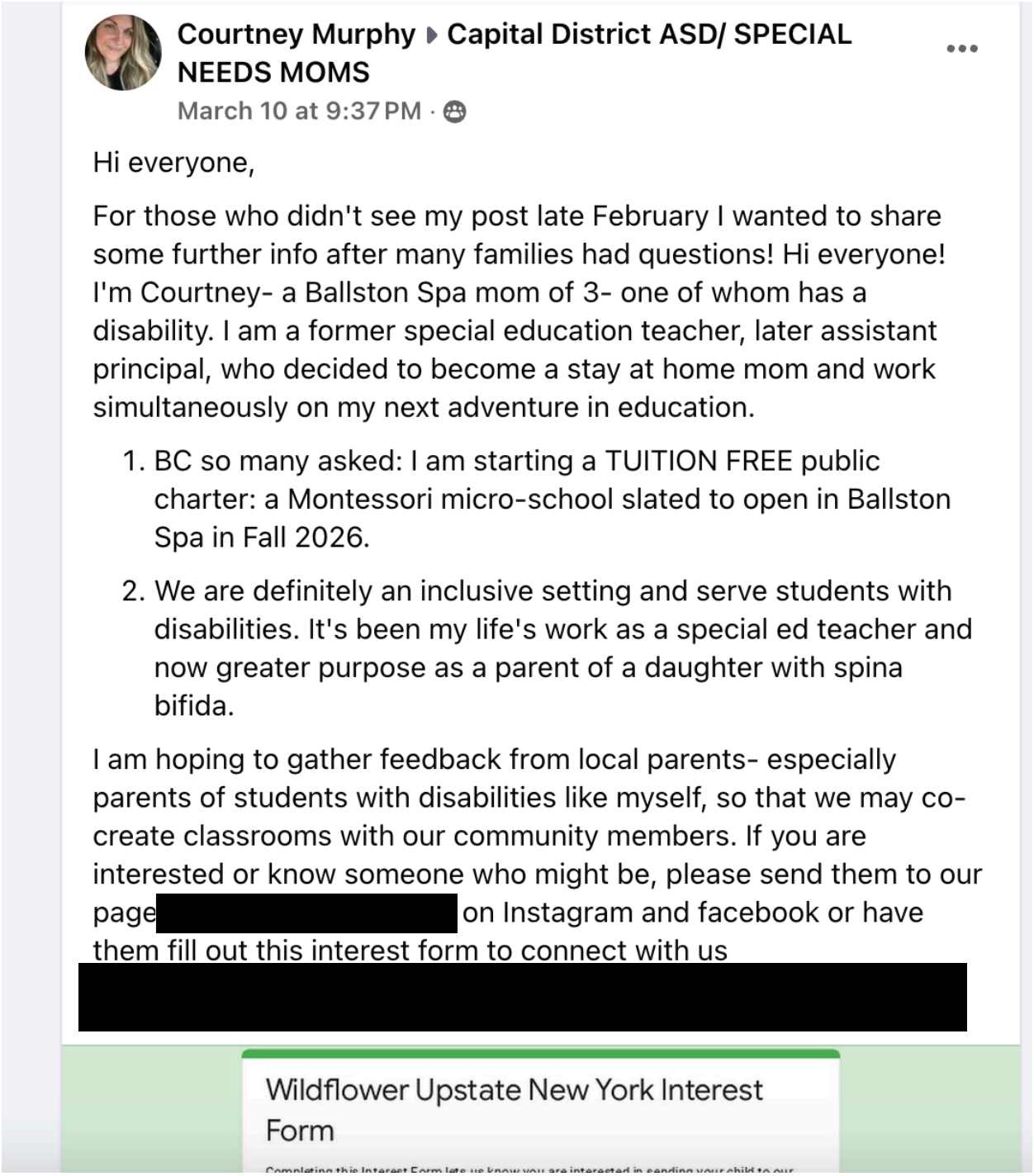
Email *

Your email

DOCS.GOOGLE.COM

Wildflower Upstate New York Interest Form

Completing this Interest Form lets us know you are interested in ...


Courtney Murphy ▸ Capital District ASD/ SPECIAL NEEDS MOMS
March 10 at 9:37 PM ·
Hi everyone,
For those who didn't see my post late February I wanted to share some further info after many families had questions! Hi everyone! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.
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2. We are definitely an inclusive setting and serve students with disabilities. It's been my life's work as a special ed teacher and now greater purpose as a parent of a daughter with spina bifida.
I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page [redacted] on Instagram and facebook or have them fill out this interest form to connect with us
[redacted]
Wildflower Upstate New York Interest Form

Courtney Murphy ▸ **Childcare in the capital region**

March 10 at 9:39 PM ·

Hi everyone!

For those who didn't see my post a few days back I wanted to share some further info after many families had questions to clarify! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.

1. BC so many asked: I am starting a TUITION FREE public charter: a Montessori micro-school slated to open in Ballston Spa in Fall 2026.
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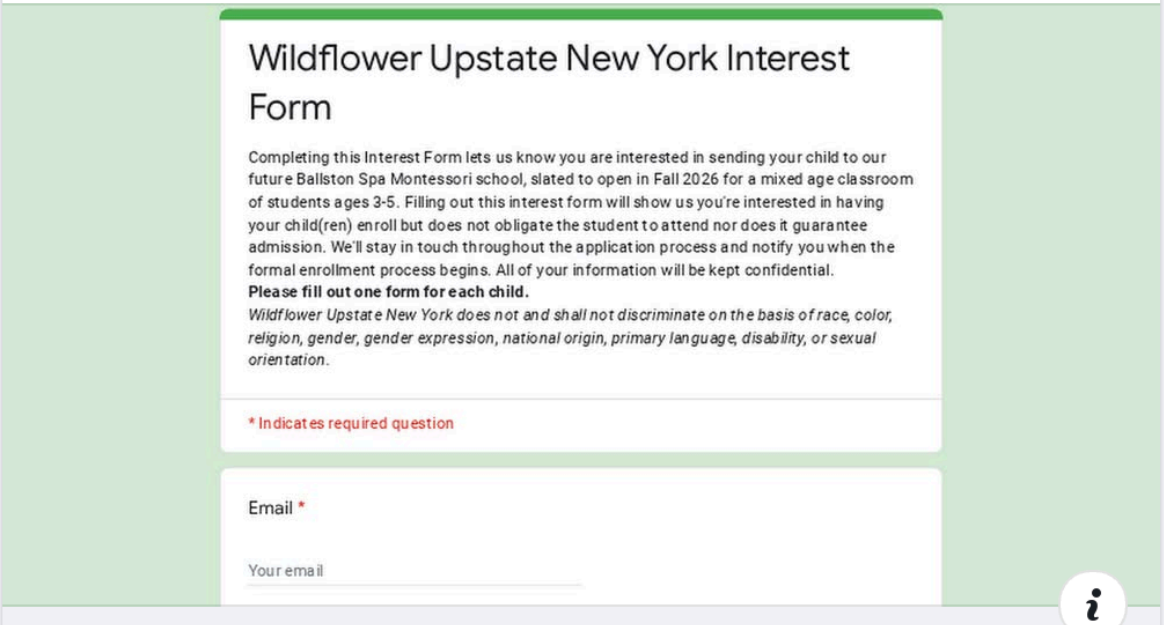
I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page [redacted]n Instagram and facebook or have them fill out this interest form to connect with us [redacted]

Courtney Murphy ▸ **Town of Ballston Community**
1h ·

Hi all! I'm starting a tuition free public Montessori micro-school in Ballston Spa and we need your help to make it a reality. If you know of anyone interested in being a prospective family- please share our interest form! It is in no way binding nor does it guarantee a seat- but it helps show our authorizers we have local interest. Give us a follow on Facebook/Instagram [redacted]

[redacted]



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Wildflower Upstate New York Interest Form

Completing this Interest Form lets us know you are interested in ...

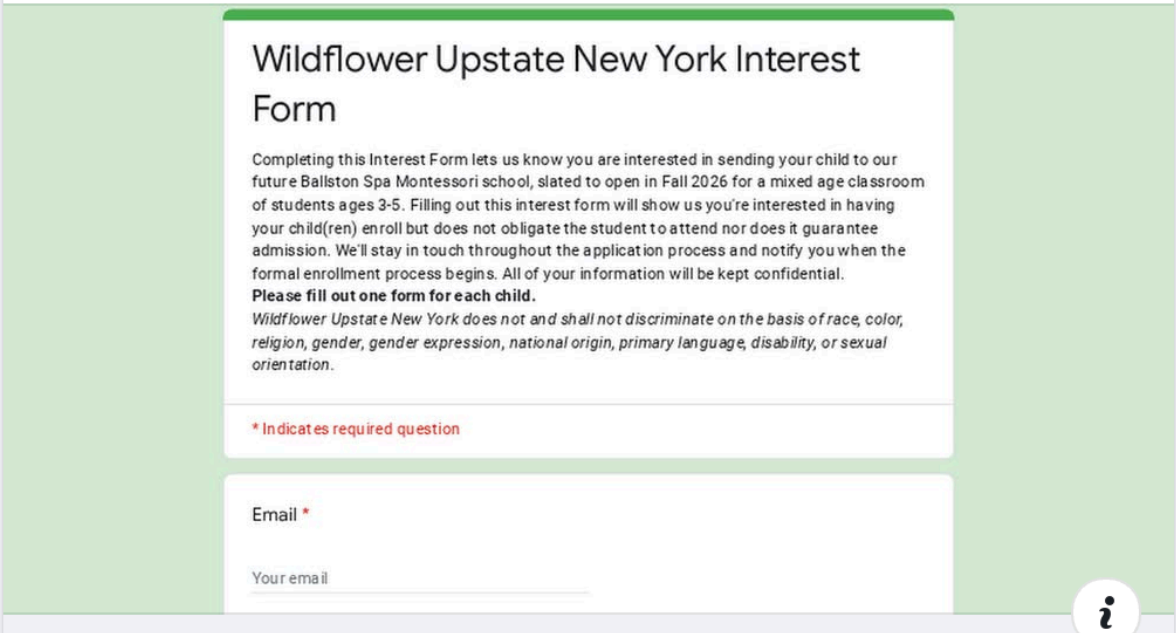
Courtney Murphy ▸ **Upstate NY Moms**
March 8 at 8:33 PM ·

Hi everyone,

My name is Courtney Murphy and I'm a former special education teacher later assistant principal turned stay at home mom. I'm working to bring a **tuition free Montessori micro-school** to Ballston Spa - slated to open in Fall 2026 with a mixed age class of 3-5 year olds. If you know anyone interested or if you yourself are interested please fill out our form!

Find us on instagram and Facebook for more info:

[redacted]



DOCS.GOOGLE.COM

Wildflower Upstate New York Interest Form

Courtney Murphy ▸ **All Things Ballston Spa & Malta NY**

March 10 at 9:40 PM ·

Hi everyone!

For those who didn't see my post a few days back I wanted to share some further info after many families had questions to clarify! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.

1. BC so many asked: I am starting a TUITION FREE public charter: a Montessori micro-school slated to open in Ballston Spa in Fall 2026.
2. We are definitely an inclusive setting and serve students with disabilities. It's been my life's work as a special ed teacher and now greater purpose as a parent of a daughter with spina bifida.

I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page [redacted]on Instagram and facebook or have them fill out this interest form to connect with us [redacted]

Courtney Murphy ▸ Saratoga Springs Moms
March 6 at 1:36 PM ·
Hi families,
My name is Courtney Murphy and I'm a mom of 3 in Ballston Spa. I wanted to share some exciting news that an amazing team and I have been working on with anyone interested. We are hoping to bring a tuition free public Montessori micro-school to the area in Fall 2026 with a small classroom of mixed ages 3-5 years old.
If this sounds interesting to anyone please give us a follow on [redacted] or search us on Facebook [redacted]
There you'll find our mission/vision and plans for the upcoming year. As a public charter, our enrollment is not exclusive to only Ballston Spa residents- so I wanted to inform other local families who may be looking for Montessori programming. Here is our interest form as well.
[redacted]
Wildflower Upstate New York Interest Form
Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.
Please fill out one form for each child.
Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.
* Indicates required question

Courtney Murphy ▸ **Saratoga Springs Moms**

March 10 at 9:39 PM ·

Hi everyone,

For those who didn't see my previous post I wanted to share some further info after many families had questions! Hi everyone! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.

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I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page [redacted]n Instagram and facebook or have them fill out this interest form to connect with us [redacted]

Courtney Murphy ▸ **Childcare in the capital region**

February 23 at 5:03 PM ·

Hi everyone! I'm Courtney- Founder of Wildflower Montessori Upstate NY. We are a public charter micro-school slated to open in the Fall of 2026 in Ballston Spa. Our first classroom will be a primary grade band- a mixed age group class of 3-5 year olds. This upcoming year and a half we hope to gather feedback from community members in creating classrooms that are a collaborative effort and fulfill the needs and wants of families in the area.

Our mission at "Ballston Spa Montessori"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where every child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that every student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "Ballston Spa Montessori"* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.
(*Our name is subject to change with community and teacher input!)

If the mission and vision resonate with you, please give us a follow on Instagram and we can chat further!

Courtney Murphy ▸ **Saratoga Area Parents of Special Needs**

March 10 at 9:40 PM ·

Hi everyone!

For those who didn't see my post a few days back I wanted to share some further info after many families had questions to clarify! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education.

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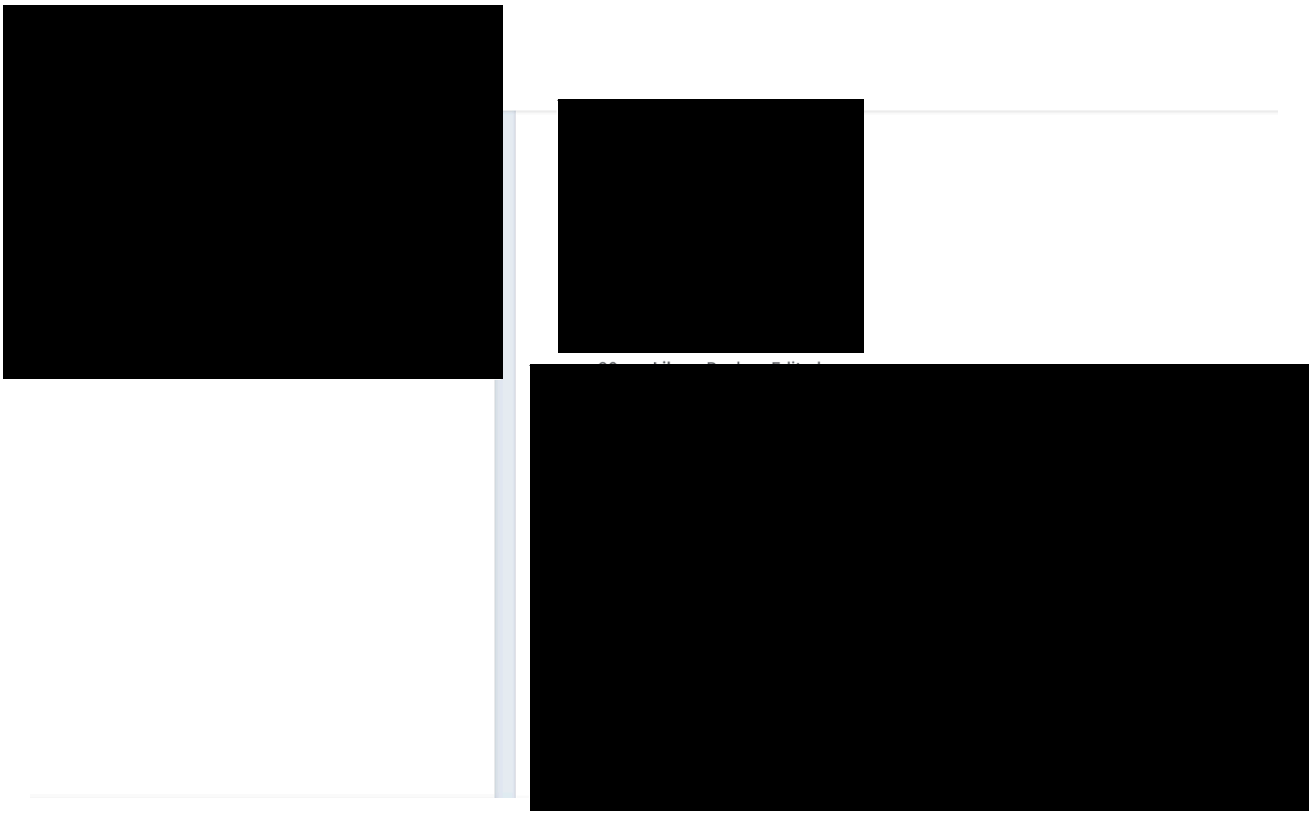
I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members. If you are interested or know someone who might be, please send them to our page [redacted] on Instagram and facebook or have them fill out this interest form to connect with us [redacted]



Courtney Murphy ▸ **Capital District ASD/ SPECIAL NEEDS MOMS**

February 27 at 10:20 AM ·

Hi everyone! I'm Courtney- a Ballston Spa mom of 3- one of whom has a disability. I am a former special education teacher, later assistant principal, who decided to become a stay at home mom and work simultaneously on my next adventure in education. I am starting a Montessori micro-school slated to open in Ballston Spa in Fall 2026. I am hoping to gather feedback from local parents- especially parents of students with disabilities like myself, so that we may co-create classrooms with our community members.

Our mission at "*Ballston Spa Montessori"** is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

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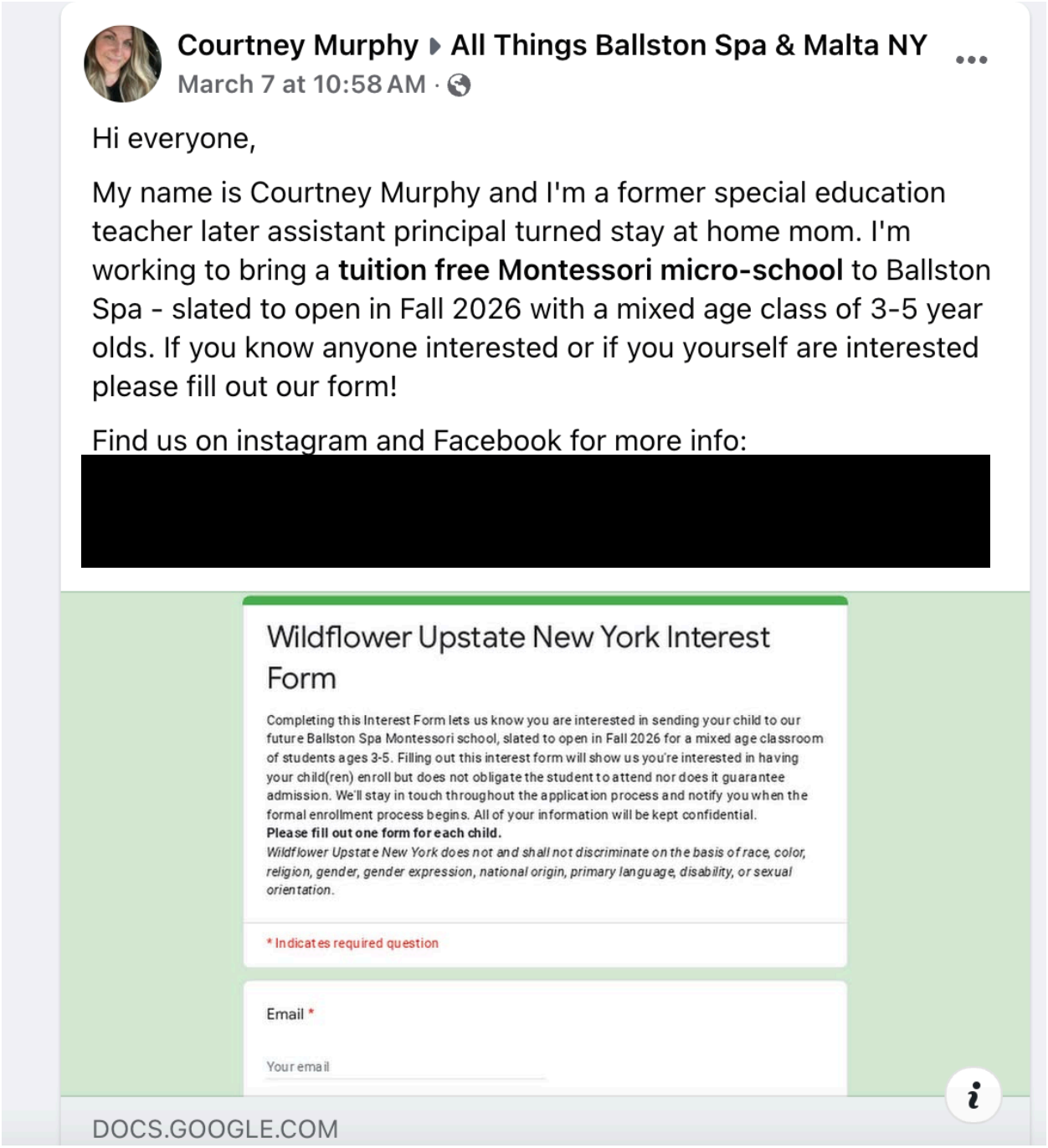
**Name subject to change based on community collaboration and feedback*


Courtney Murphy ▸ All Things Ballston Spa & Malta NY
March 7 at 10:58 AM ·
Hi everyone,
My name is Courtney Murphy and I'm a former special education teacher later assistant principal turned stay at home mom. I'm working to bring a tuition free Montessori micro-school to Ballston Spa - slated to open in Fall 2026 with a mixed age class of 3-5 year olds. If you know anyone interested or if you yourself are interested please fill out our form!
Find us on instagram and Facebook for more info:
[redacted]
Wildflower Upstate New York Interest Form
Completing this Interest Form lets us know you are interested in sending your child to our future Ballston Spa Montessori school, slated to open in Fall 2026 for a mixed age classroom of students ages 3-5. Filling out this interest form will show us you're interested in having your child(ren) enroll but does not obligate the student to attend nor does it guarantee admission. We'll stay in touch throughout the application process and notify you when the formal enrollment process begins. All of your information will be kept confidential.
Please fill out one form for each child.
Wildflower Upstate New York does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, national origin, primary language, disability, or sexual orientation.
* Indicates required question
Email *
Your email
DOCS.GOOGLE.COM

To the family o [redacted]

Thank you so much for your interest in our school! We recently received your interest form and wanted to send you a voluntary questionnaire-which we refer to as discovery questions. We value your feedback as we work to co-create a school that truly serves local families. Our schools are community-driven, and this is one way we're putting that belief into action. Your input is invaluable in shaping a program that meets the needs of our future families. Thank you for sharing your voice with us!

All questions are voluntary- feel free to skip anything if you'd like/aren't sure what to contribute. There are no right answers, just whatever is right for **you** with your child in mind.

To start, we'd love to share our mission and vision to gauge alignment and hear any pushback. Please feel free to copy/paste the questions and reply in another email!

Our mission at "*Ballston Spa Montessori*"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

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1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?)
- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school:

4) What would an ideal educational experience look like/sound like/ feel like for your child?

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):

7) What does community mean to you?

8) Tell us about your child, especially as a learner.

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7) What does community mean to you?

8) Tell us about your child, especially as a learner.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are
some things that are going well at your child's current school?

10) How can school help your child to prepare for their future?

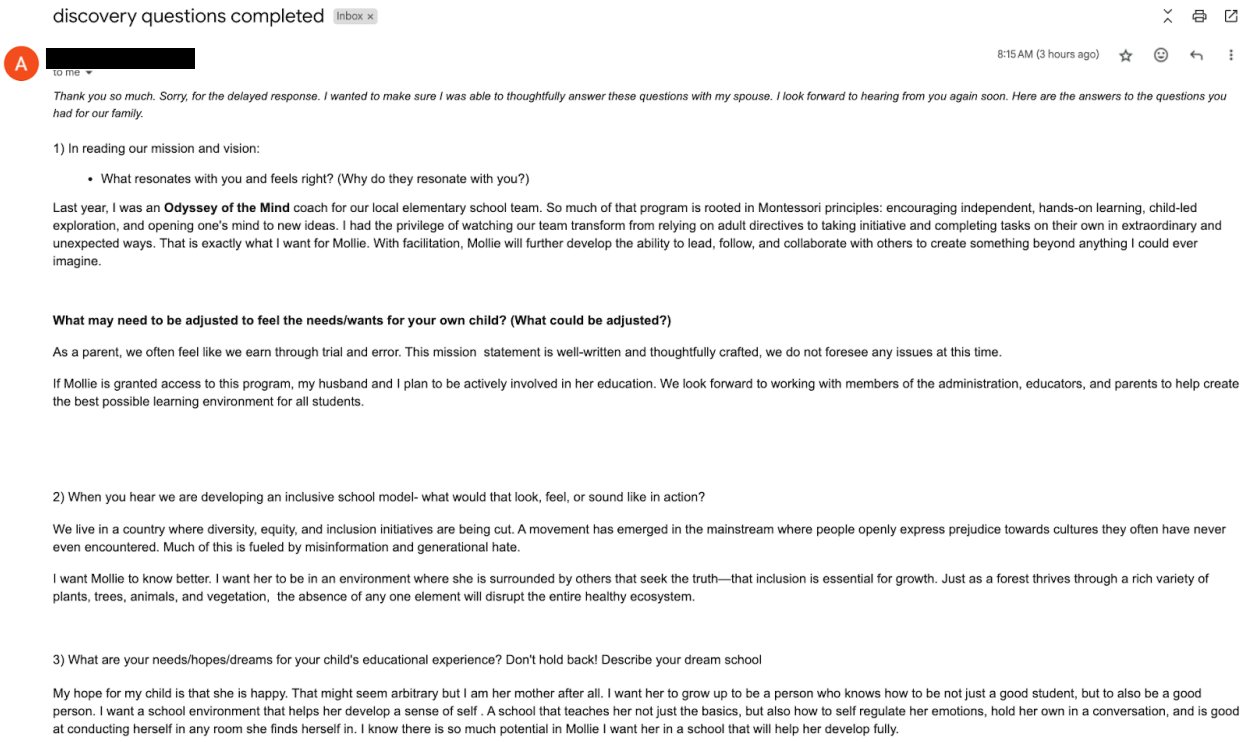
11) What do you want your child(ren) to know/feel/learn as they move through their elementary years?

12) Have you explored the various education models that are available to you based on where you live?

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
○ If so, what is your general availability/preference for a monthly meeting?

Thanks so much for taking a look at these questions. Remember there are no answers we're looking for, in fact, your answers will truly influence our design as a community driven school. Thank you so much for your partnership, and we will be in touch soon.

Courtney and the Wildflower Team



discovery questions completed Inbox ×

A [redacted] 8:15 AM (3 hours ago)

to me

Thank you so much. Sorry, for the delayed response. I wanted to make sure I was able to thoughtfully answer these questions with my spouse. I look forward to hearing from you again soon. Here are the answers to the questions you had for our family.

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?)

Last year, I was an **Odyssey of the Mind** coach for our local elementary school team. So much of that program is rooted in Montessori principles: encouraging independent, hands-on learning, child-led exploration, and opening one's mind to new ideas. I had the privilege of watching our team transform from relying on adult directives to taking initiative and completing tasks on their own in extraordinary and unexpected ways. That is exactly what I want for Mollie. With facilitation, Mollie will further develop the ability to lead, follow, and collaborate with others to create something beyond anything I could ever imagine.

What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

As a parent, we often feel like we earn through trial and error. This mission statement is well-written and thoughtfully crafted, we do not foresee any issues at this time.

If Mollie is granted access to this program, my husband and I plan to be actively involved in her education. We look forward to working with members of the administration, educators, and parents to help create the best possible learning environment for all students.

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?

We live in a country where diversity, equity, and inclusion initiatives are being cut. A movement has emerged in the mainstream where people openly express prejudice towards cultures they often have never even encountered. Much of this is fueled by misinformation and generational hate.

I want Mollie to know better. I want her to be in an environment where she is surrounded by others that seek the truth—that inclusion is essential for growth. Just as a forest thrives through a rich variety of plants, trees, animals, and vegetation, the absence of any one element will disrupt the entire healthy ecosystem.

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school

My hope for my child is that she is happy. That might seem arbitrary but I am her mother after all. I want her to grow up to be a person who knows how to be not just a good student, but to also be a good person. I want a school environment that helps her develop a sense of self . A school that teaches her not just the basics, but also how to self regulate her emotions, hold her own in a conversation, and is good at conducting herself in any room she finds herself in. I know there is so much potential in Mollie I want her in a school that will help her develop fully.

4) What would an ideal educational experience look like/sound like/ feel like for your child?

[redacted]kes up in the morning and is excited about the day ahead. She puts on an outfit that she picks no matter if it is a sundress with rain boots or overalls with paint stains. She should be in a school community where she feels safe and nurtured. I want her to know all her classmates by name and feel that they are on her team. She should enjoy being outside and have time to play. I know this may sound simple, but more than anything, I just want her to love learning. I never want her to lose her sense of wonder.

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):

Since [redacted]s not enrolled in school yet, I will speak to my own experience.

While competing on my High School Swim Team, I was not the best swimmer. In hindsight, that was never the point. With my coach's guidance and instruction, I was the best I could possibly be. Simply put, my coach was a no-nonsense, no-excuses, tough lady. She continually pushed our team to excel. When our bones felt weak after a 5,000 mile swim, we would come the next day for more because she knew we could and we did. I competed in the 500M and the 200M. There were not many people in my life at that time that asked more of me, and given the guidance and expectation of reaching my potential, I was astonished at how powerful my body was in the water. I went on to compete at the college level. Being in control of my body helped me feel strong in who I am beyond the pool. I want Mollie to find her own outlet of strength. For me it was swimming. For her, she will let us know.

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):
N/A

7) What does community mean to you?

Everything. Both my husband's and my families live far away. While they are deeply involved in our children's lives, they are not always physically present. Because of this, we have built a strong local community to support our children..

As a stay-at-home mom, I have surrounded myself with a wonderful group of like-minded mothers who prioritize play, education, and meaningful experiences for our children. We see each other weekly, filling our days with trips to children's museums, nature walks, Cafe Lena, aquarium visits, story times, playground adventures, and thoughtfully curated toddler events.

We are also actively involved in our Jewish community. My husband is culturally Jewish, and we are raising our children with those values as well. We belong to a liberal, open-minded temple that has been an incredible source of enrichment and connection for our kids.

My hope is that [redacted]will find yet another nurturing and supportive community within this Montessori school.

8) Tell us about your child, especially as a learner.

[redacted]s she likes to be called (never just[redacted]) a combined verbal and visual learner. She is able to identify all capital letters in the alphabet, knows her colors, and can count to fourteen. She learns from books and asking questions. She is like most children her age, is a sponge soaking up everything around her. She boldly climbs to the top of playgrounds, grabs a hand of a kid she doesn't know asking to play, and makes crafts at story time with unbridled chaos. Mollie loudly shares her opinion, loves to learn, and is always asking questions. She is not graceful, but that has never stopped her from dancing. She is a joyful child. It is my hope she can remain joyful across all environments as she matures.

10) How can school help your child to prepare for their future?
I don't know in this ever changing world what the future is going to look like. So I believe at the elementary/ middle school level school should help students develop good character. Guide kids to stay true to themselves and not lose faith in humanity. Be respectful, be kind, and learn from one other. Core values are what makes upstanding adults.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years?
It's pinnacle that we don't ignore the time in our children's life where their brain is quickly developing and the roadmap to who they will become is being formed. I want my child to be surrounded by good people who value education, inclusion, and teaches her to open her mind to possibility. Teaching [redacted]ultiple ways of learning will set her up to approaching a problem from different angles. She will become more creative and inspired to reach the goals in the life she sets up for herself.

12) Have you explored the various education models that are available to you based on where you live?
Yes, Befor[redacted]was born we chose to move into our dream home within a small intimate school district. This decision was not something we take lightly as education is a core value of our parenting. We thought the smaller class sizes, ability to join clubs and sports without cuts would be ideal for nurturing any interest she might have. As she got older we have changed our way of thinking with our daughter's needs and have become interested in the Montessori approach. We still value the small class sizes, but we now see that she benefits when her playdate partners are different age ranges. We see her opening her understanding of the world around her when she is interested in a particular topic. What we thought was right for our daughter might not necessarily fit the current educational model of the mainstream school system. I don't want her to just perform well on an academic test. We want her to feel passionate about learning.

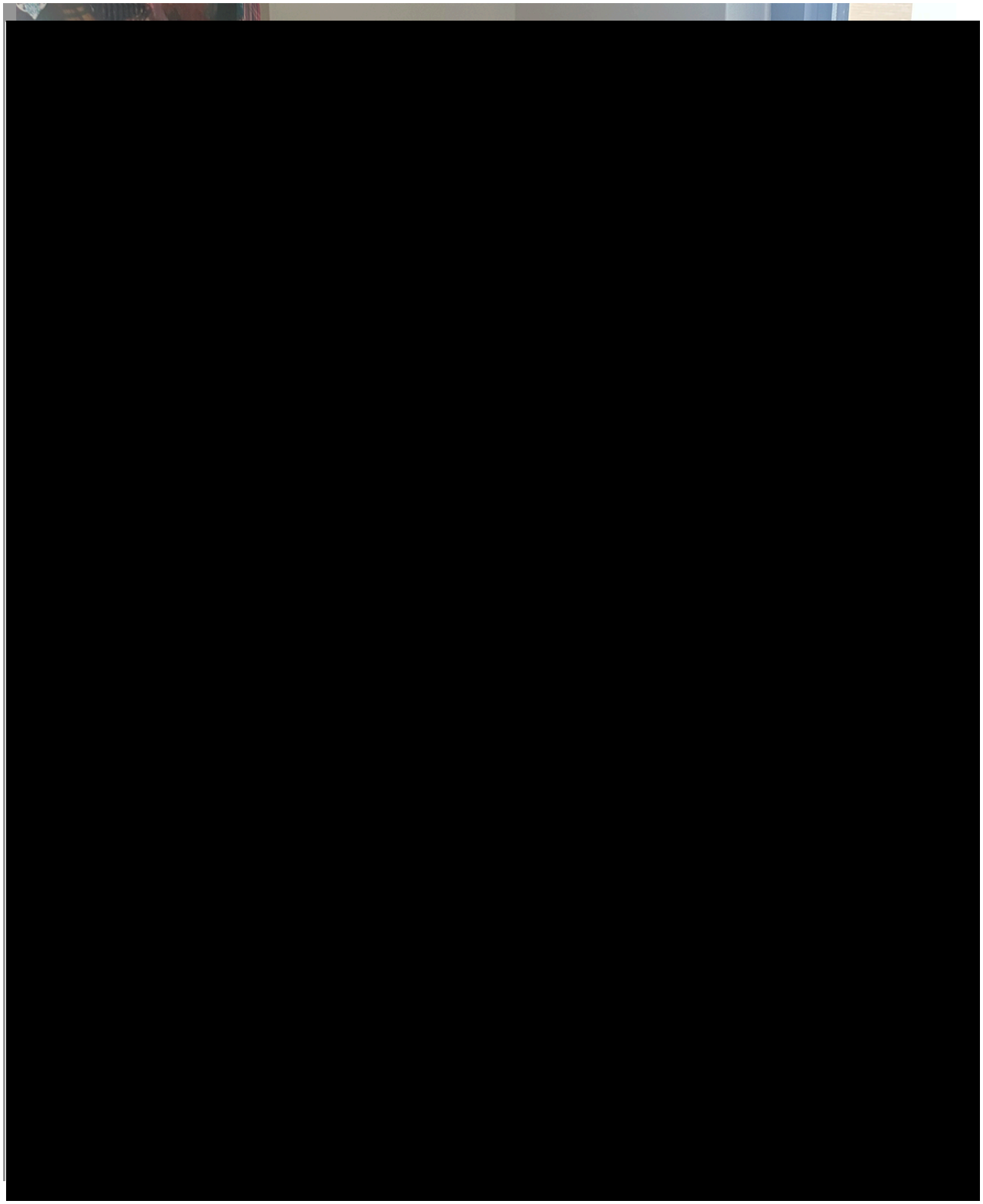
13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
○ If so, what is your general availability/preference for a monthly meeting?

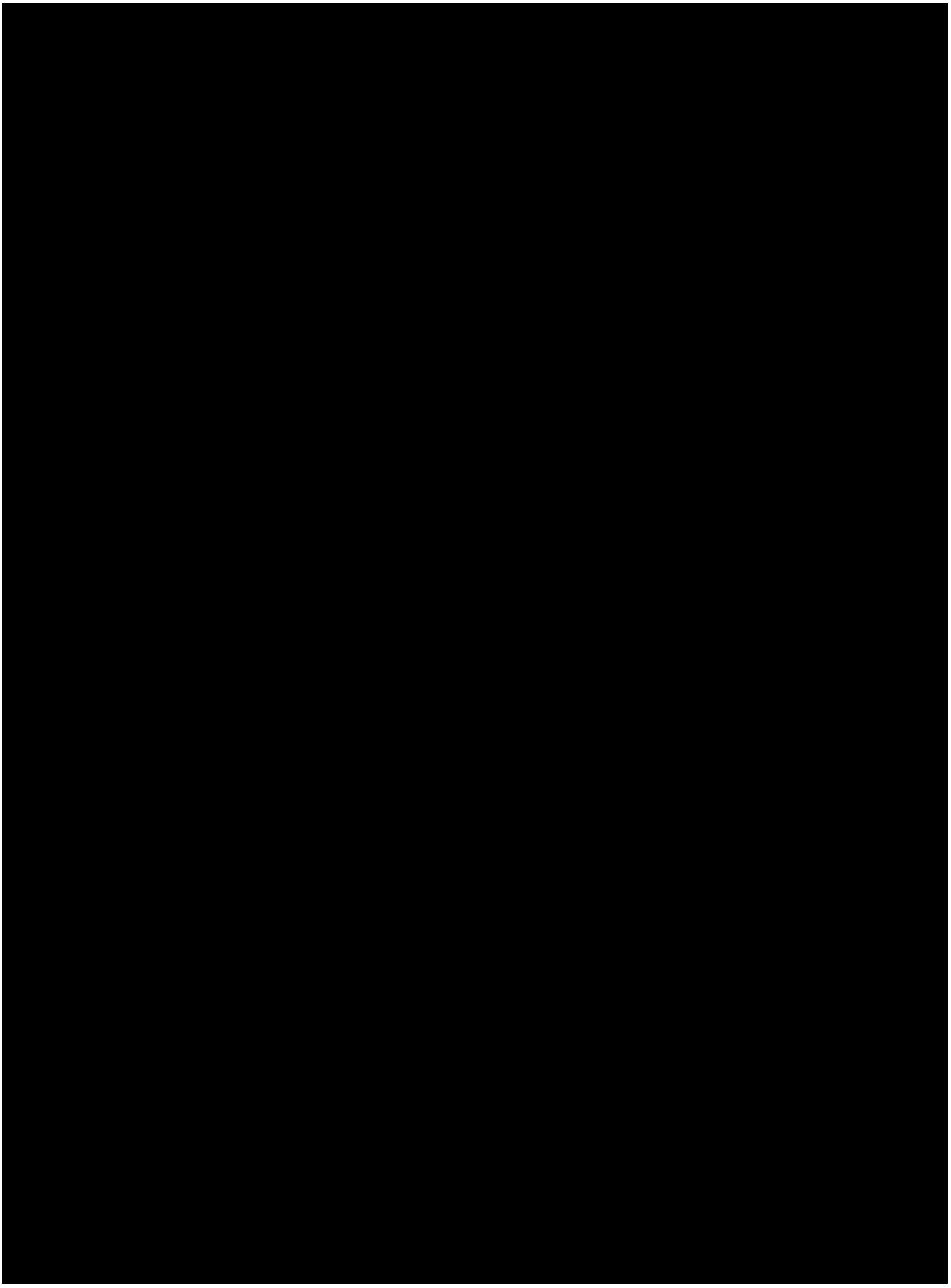
My husband and I are interested in being part of the founding families of this school. We would love to take part in meetings to help make this a reality for children in this area. We will make it a priority to stay actively involved. Our schedules are flexible, so please keep us informed about upcoming meetings, and we will join and help in any way we can.

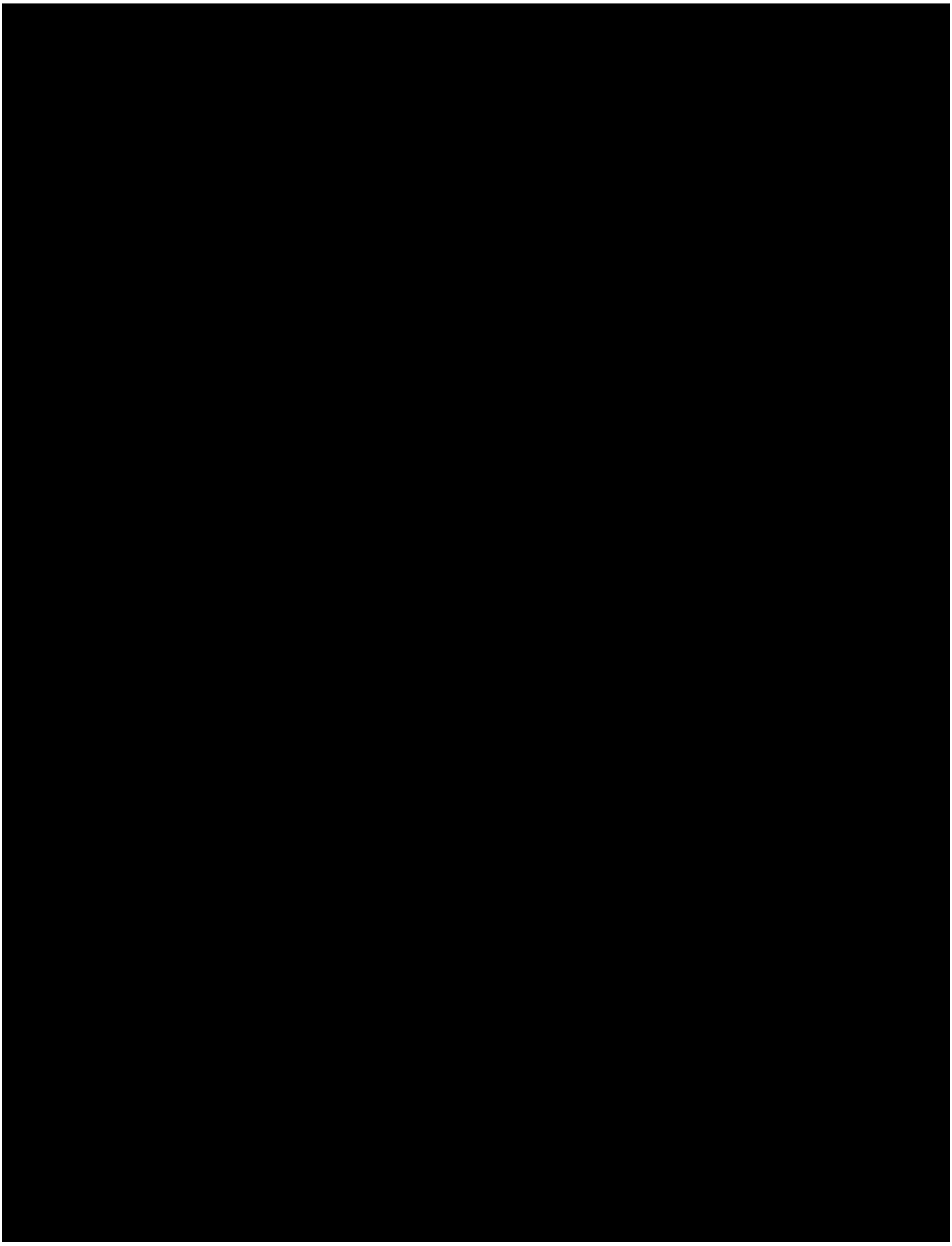
C **Courtney Murphy** [redacted] 11:20 AM (1 minute ago)

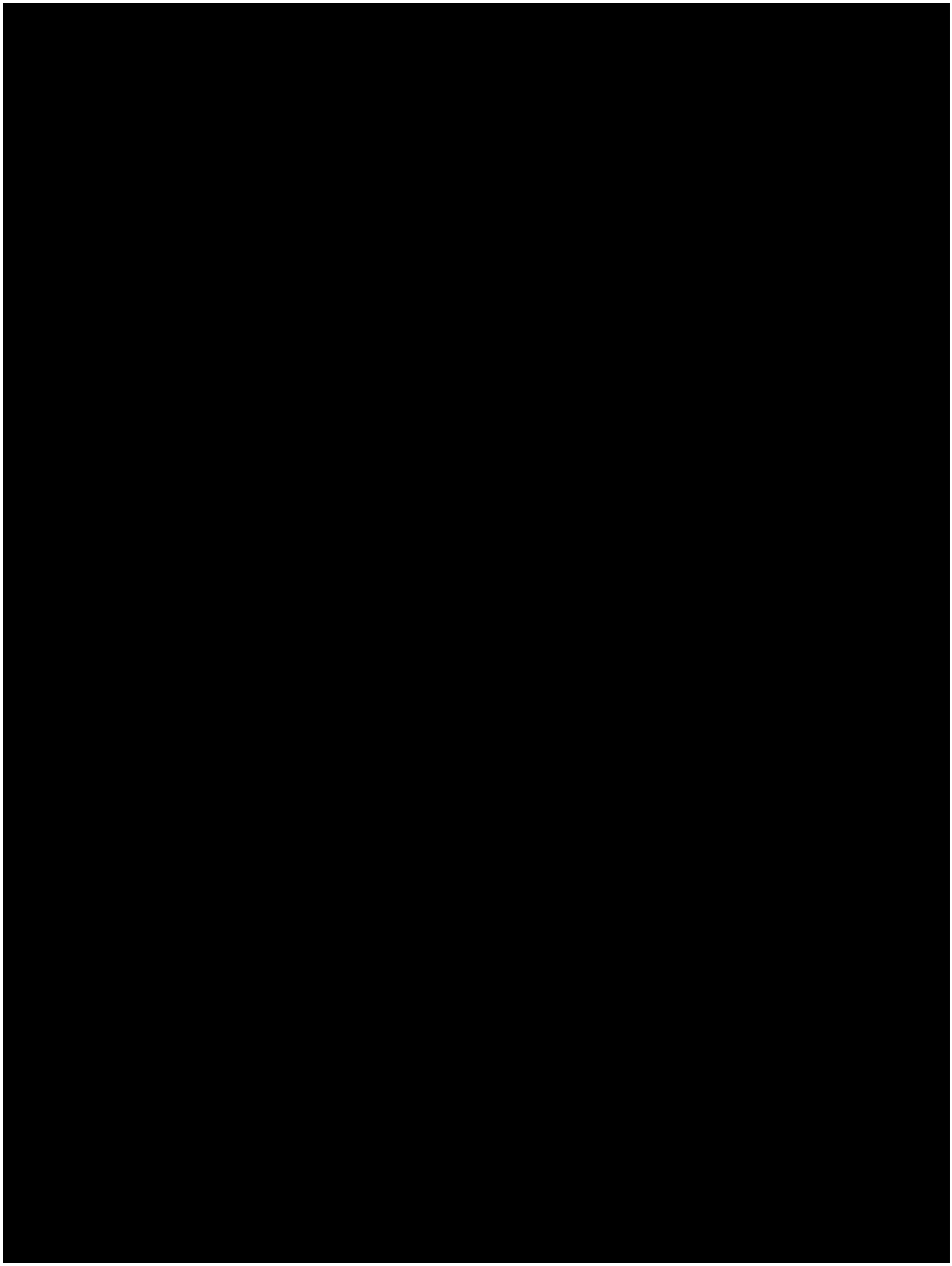
Hi there,
Thank you so much for all the thoughtful responses. I feel the one line that stands out most to me is "I just want her to love learning." That is our hope as well, that students who attend our future school become lifelong learners and truly love the experience. This was heavily influenced by my daughter's experience in a primary Montessori program in Schenectady. We will use these responses in our drafts for our authorizers to emphasize our communities wants and needs.
We very much appreciate the reply and will be in touch further along the road!
Courtney

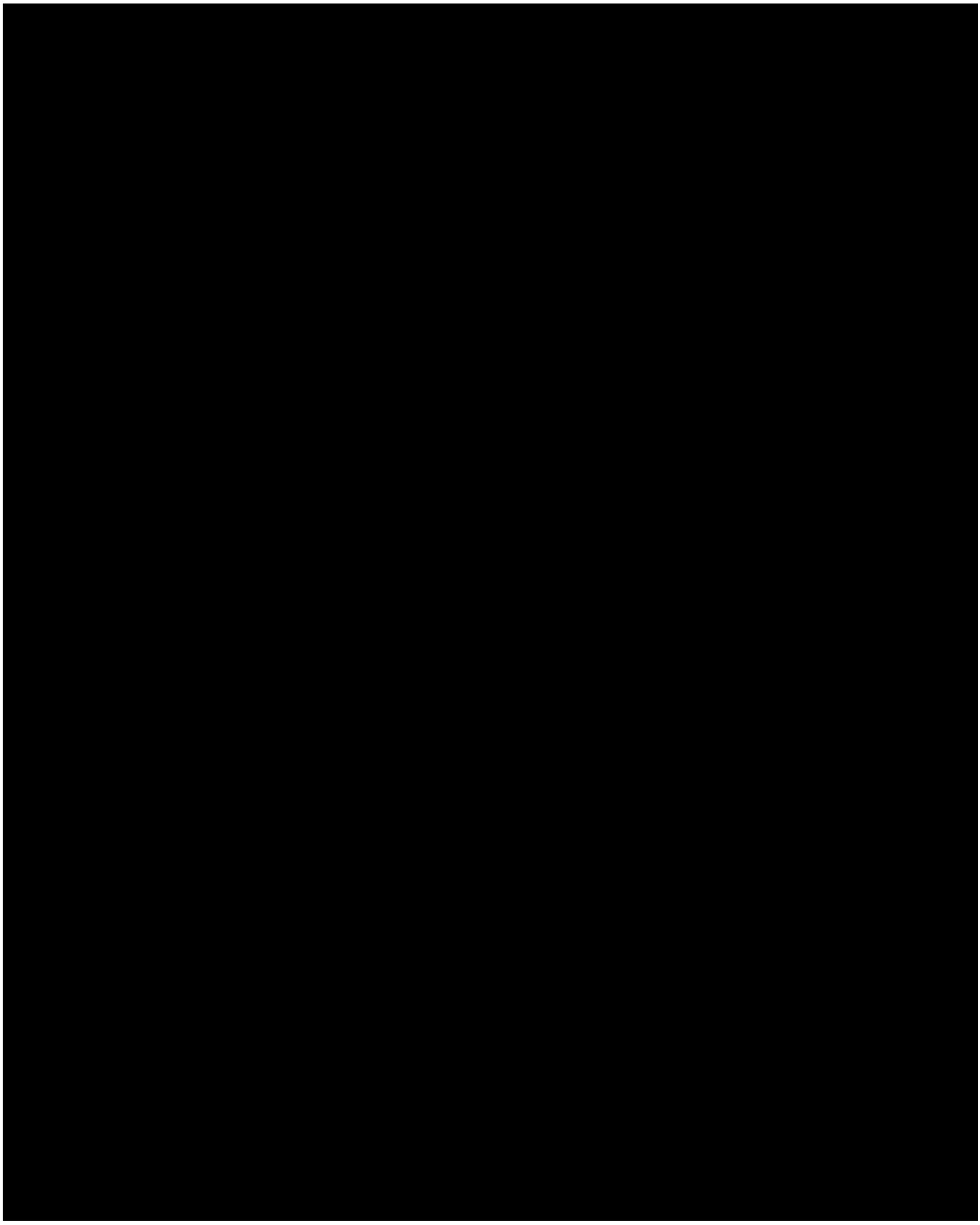
Hyacinth Montessori trip

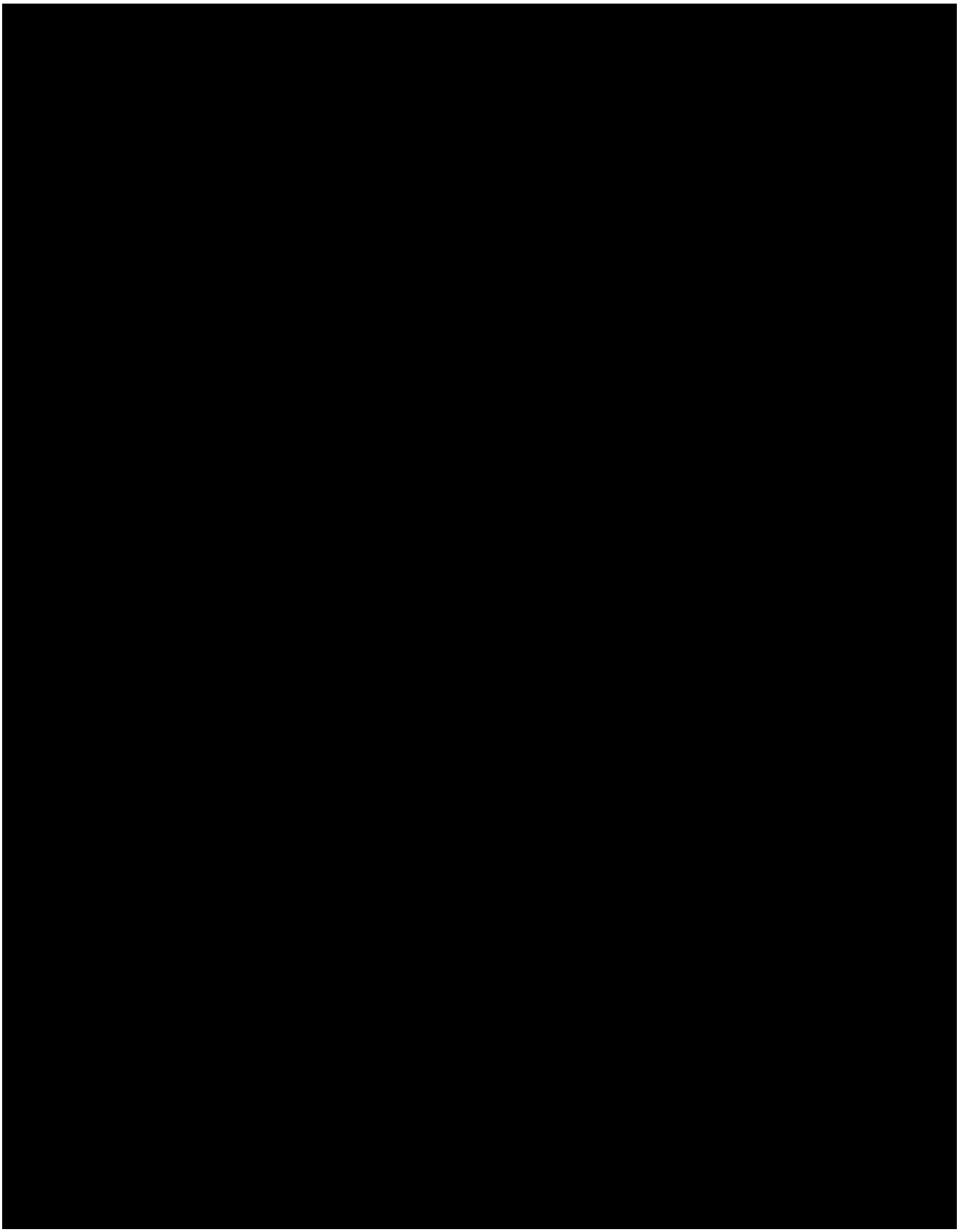


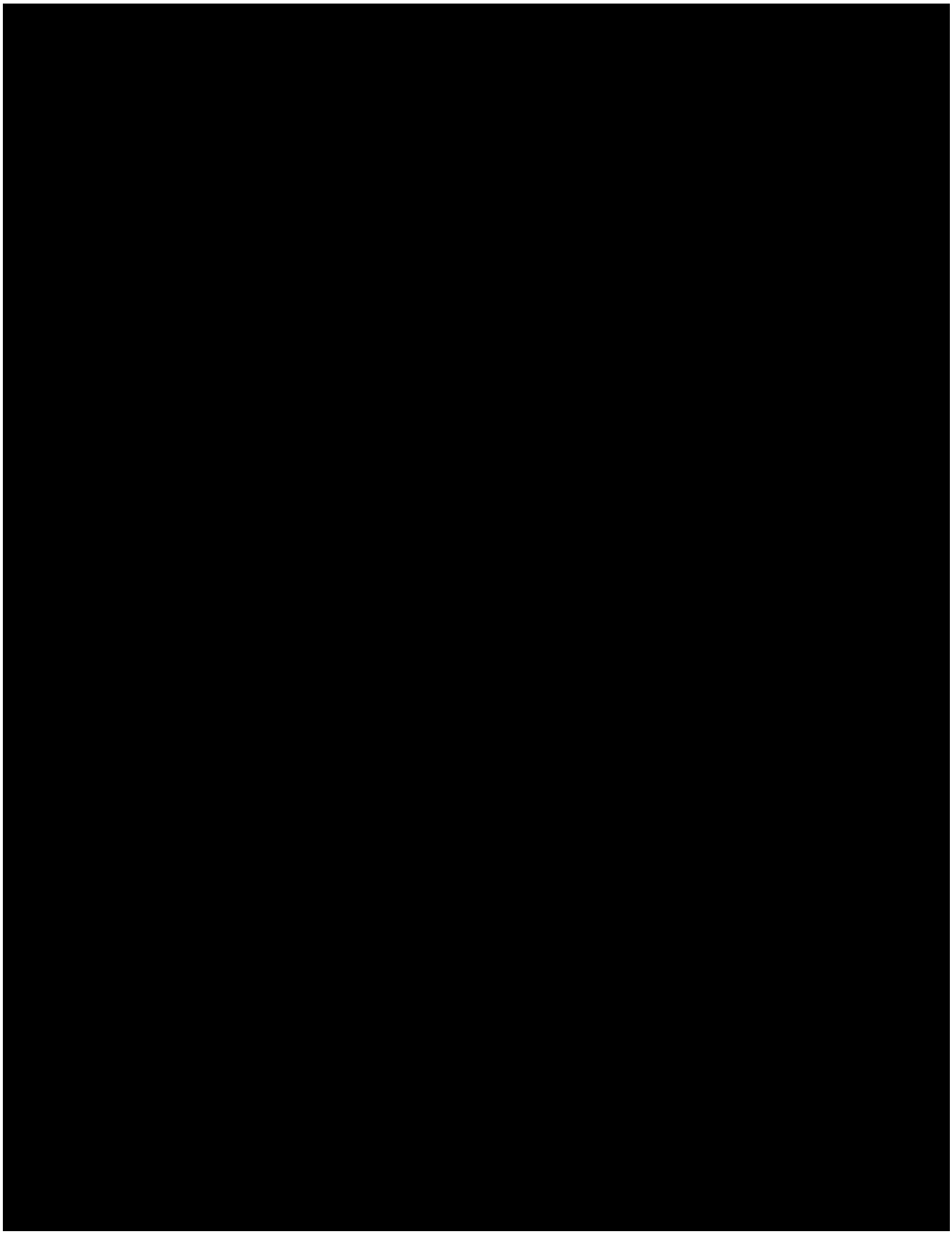












R-04e - Evidence of Support

e. Evidence of Community Support

The following people and/or organizations have provided letters of support for WUNYCS.

Letter of Support Author	Page Number	Description
[redacted]	3-4	Former colleague of Courtney Murphy, lead applicant, speaks to Murphy's ability to lead
[redacted]	5-6	Former colleague of Courtney Murphy, lead applicant, speaks to Murphy's ability to lead
[redacted]	7	Prospective parent in the community voices support for equity/accessibility in our model
[redacted]	8	Former resident- parent of a student with a disability- expresses support for inclusive school models
Meghan Connolly Haupt, Founder: Inclusive Saratoga	9	Founder of Inclusive Saratoga, a nonprofit dedicated to creating spaces that allow individuals with disabilities to fully participate, voices support of our inclusive model
Julia Duff, Executive Director: Spina Bifida Association of New York	10	Executive Director of SBANY's, discusses support and how our mission aligns with SBANY's for individuals with disabilities
Jade Verrigni, Owner and Director of Little Ones Montessori	11	Owner/Director of Little Ones Montessori, an independent Montessori school in upstate New York, expresses support
Amy Klein, Director of Riverrun Montessori	12	Director of Riverrun Montessori, an independent Montessori school in upstate New York, expresses support
Mary Beth Walsh NYS Assembly: 112th District	13	Assemblywoman for 112th District, in which Ballston Spa is located, expresses support
[redacted]	14	Teacher/parent who lives in Ballston Spa expresses support for our school

district/parent who lives in Ballston Spa		
[redacted]	15	Local prospective parent of a student with a disability expresses support for our inclusive model
[redacted]	16-17	Local prospective parent expressing support for our school
[redacted] local parent	18	Local prospective parent/speech provider expresses support for our school
[redacted] Therapist	19	Local pediatric Physical therapist expresses support for our school
Nora Bisnett, Director: Ballston Area Recreation Center	20-21	Local Ballston Spa Recreation Center forges community partnership and supports our school
[redacted], Ballston Spa resident	22	Local Ballston Spa resident expresses support for our school
[redacted] parent	23	Local prospective parent expresses support for our school
[redacted] local parent	24	Local prospective parent expresses support for our school
[redacted] local parent	25	Local prospective parent expresses support for our school
[redacted]	26	Local prospective parent expresses support for our school
Wood Road Elementary Parent Teachers Association	27	Wood Road PTA expresses letter of support for our inclusive and equitable tuition free model

Letter of Support: Ms. Murphy/Lead Applicant
March 2, 2026

Dear Members of the SUNY Charter Schools Institute Review Team,

It is a great honor to write a letter for Courtney Murphy in support of her next educational endeavor founding the Ballston Spa Montessori. As an ELA teacher at KIPP Albany Community Charter School, I worked closely with Ms. Murphy who was the Assistant Principal from 2020 to 2024. During this time, Ms. Murphy demonstrated her strength as a talented and dynamic leader with a wide range of skills. It has been a privilege to observe Ms. Murphy's growth not only as an educator but also as a passionate advocate for equity and social justice in education.

Ms. Murphy consistently demonstrated a high level of motivation and dedication in her work. She approached every problem with a diligent mindset, ensuring that her efforts were both thorough and impactful. Her organizational skills are commendable; she effectively manages her time and resources, which allows her to excel in a demanding academic environment. More importantly, her data-driven approach to learning enables her to analyze her performance critically, fostering continuous improvement.

What sets Ms. Murphy apart is her solutions-oriented mindset. She does not shy away from challenges; rather, she seeks to understand the root causes and proposes thoughtful, actionable solutions. She leads with compassion, balancing a warm demeanor with a strict adherence to high standards. Her ability to foster a supportive environment while encouraging accountability is truly impressive.

When examining student data and discovering that a schedule change and restructuring could yield better student results, Ms. Murphy combined her two talents of problem-solving and special education to redesign a schedule that prioritized student needs. When this was brought up during an intense staff meeting, I remember Ms. Soucy's response very clearly; she said, "I have a solution already in mind, but give me a day to make sure that there are no wrinkles in this plan" The result was more support for students and educators. Having Ms. Murphy in your corner means that you have a powerhouse who will tackle the hard questions with enthusiasm and diligence, and student achievement and well-being are always at the center of her laser-focus.

Furthermore, Ms. Murphy brings joy to the learning environment. She always has a learning game on cue! Although there are some standards that she uses on regular rotation, what is even more impressive is that she does not rest with those few classic learning games in her repertoire. Instead, it is clearly evident in her practice that she is always digging deeper looking for new innovative techniques to engage student learning on more meaningful levels.

Working with Ms. Murphy has been an experience that has challenged me to improve myself as not only an educator but as a parent! Through her patient example and innovative intention, she has taught countless educators how to balance the demands of teaching while always keeping student achievement as the central focus. I wholeheartedly endorse Ms. Murphy's next endeavor, and I cannot wait to see how many more children will thrive in the learning environment that she creates at Ballston Spa Montessori.

Sincerely,

Kerrianne Smith

ELA Teacher

KIPP Albany Community Charter School

February 24, 2025

SUNY Charter Schools Institute Review Team,

My professional journey as an educator has afforded me the opportunity to collaborate with the force of nature known as Courtney Murphy. Working together for four academic years at KIPP Albany Community Charter Middle School, I personally witnessed the depth and breadth of her skills, expertise, and tenacity. There is no half-steppin' with this educator; she's all in. Our education community will greatly benefit from her endeavor to found and curate a unique, innovative learning experience through Ballston Spa Montessori School.

The 2019-2020 academic year was my introduction to Murphy (we use last names at our school). From that time through the 2023-2024 academic year she functioned in a variety of roles from educator, academic coach, to assistant principal. From the onset she established herself as a reliable colleague, invested coach, and thoughtful educator. In her capacity as academic coach, she supported a team of sixth to eighth STEM educators; co-internalizing, co-teaching, and fine tuning lessons to serve the diverse needs of our students.

As my coach, Murphy helped me adapt instruction to meet the challenges of virtual, hybrid, and in-person learning during and after the pandemic. When Murphy collaborates on lessons, you are getting the full scope of her energy, expertise, and enthusiasm. She blends her love of STEM with her endless creativity to bring lessons to life. During co-internalization meetings, her pre-work was evidence that she picked apart every aspect of the lesson; ready to support, challenge, and stretch my thinking as an educator. Murphy takes both a student and educator-centered approach to coaching. She expertly analyzes data to determine what adjustments are needed to maximize student growth. Tangentially, her caring approach is evident in how she engages with her mentees. Murphy regularly encouraged me with thoughtful notes and teacher swag as a tangible expression of her appreciation and mutual respect for the work of an educator.

Murphy's role as assistant principal was a testament to her tenacity; she just won't give up. Murphy worked with four different principals during a difficult transition period for our school. Irrespective of who was leading, Murphy continued to be a reliable, consistent source of support. The scheduler-in-chief, she masterfully created, adjusted, and fine tuned school and educator schedules to meet the ever-shifting needs of our school community. During the 2023-2024 academic year she put her educator hat on top of her assistant principal hat; teaching both English language arts and math due to staff shortages. Murphy made sure students were provided access to the education they deserve.

The values that guide our community are perseverance, respect, optimism, motivation, integrity, self-discipline, and excellence. Being fully "indoctrinated" as a member of our extended learning

community, I know Murphy will carry these values and fulfill the “PROMISE” of establishing an innovative learning experience for the future STEM enthusiasts at Ballston Spa Montessori.

I welcome any additional outreach in support of this worthy school-founder candidate. Thank you for your thoughtful consideration.

Patricia Gordon-Matthews
Middle School Science Educator
[redacted]

Gmail

Courtney Soucy [redacted]

Letter of Support for Ballston Spa Montessori

2 messages

[redacted] Mon, Mar 3, 2025 at 3:39 PM

Dear SUNY Charter Schools Institute,

I am writing to express my strong support for the proposed Ballston Spa Montessori Charter School, led by Courtney Soucy. As an area resident with children approaching school age, I am particularly enthusiastic about the unique educational opportunity this school will provide.

Courtney's vision and passion for a free, public Montessori school is deeply compelling. I understand the transformative potential of this school and fully trust her expertise. The child-centered, individualized learning environment fostered by the Montessori approach cultivates independence, curiosity, and a lifelong love of learning, all things that my wife and I hope to instill in our two young daughters.

What sets Ballston Spa Montessori apart is its commitment to equity and accessibility. Courtney's dedication to providing a free Montessori education to all children in our community, regardless of their background, is truly commendable. This school will fill a critical gap in our educational landscape, offering a high-quality, proven educational model to families who might otherwise lack access to it.

Courtney's mission, to create an inclusive and empowering learning environment where every child feels a sense of belonging, resonates deeply with me, especially as a 4th grade teacher with 15 years of experience. In a world increasingly focused on standardized testing and rigid curricula, we need schools that will prioritize the holistic development of children, fostering not only academic excellence but also social-emotional growth and a sense of community.

Courtney's background as a special education teacher and assistant principal, combined with her dedication to the Montessori philosophy, makes her exceptionally qualified to lead this endeavor. Her personal experience with the Wildflower Schools network further strengthens her ability to implement a successful and sustainable model.

I believe that Ballston Spa Montessori will be a valuable asset to our community, providing a much-needed alternative to traditional education and empowering our children to become engaged, responsible, and compassionate citizens. I urge the SUNY Charter Schools Institute to approve this application.

Sincerely,

[redacted]

Gmail **Courtney Murphy** [redacted]

Letter of support

[redacted]

Sat, Mar 22, 2025 at 9:18 AM

To Whom It May Concern,

As a former Ballston Spa graduate and longtime resident, I am writing in full support of the proposed tuition-free, inclusive Montessori school in our community: Wildflower Upstate New York. As a parent of two children—one of whom has autism—I know firsthand how important it is to have educational options that truly embrace and support all learners. When my child was younger, we found that inclusive school models in our area were limited. There were typically one or two places that families recommended if a child had an IFSP or IEP, leaving parents like me with few choices for an environment that truly met their child's needs.

When we enrolled our son in the local suggested school that many students with IEPs attend, we were hopeful it would be a place where he felt welcomed and included. Unfortunately, that sense of belonging was missing. After just one day of school, we were told he may not be able to attend due to his needs. That moment was heartbreaking, and it reinforced how crucial it is for schools to be designed with **all** learners in mind from the start. Students like my son need teachers who will give them the space to be their full selves while also providing the resources and support outlined in their IEPs—and that's exactly what a Montessori education does.

Montessori would have been an incredible fit for my child because of its multi-sensory, hands-on learning approach and the way it allows children to move at their own pace while being guided by educators who observe and support their individual growth. Children with autism often thrive in structured yet flexible environments that promote independence, encourage curiosity, and minimize unnecessary sensory overload. The Montessori method naturally fosters these conditions by using individualized learning plans, mixed-age classrooms that build social skills, and a focus on practical life skills that help all students develop confidence and independence.

The mission and vision of this new Montessori school align closely with what I believe education should be for all students and families—a place where every child feels valued, supported, and empowered to reach their full potential. I truly believe this school will fill a much-needed gap in our community and provide children like my son with an opportunity to learn and grow in a space that sees them for who they are, not just the challenges they face.

Even though I am no longer living in Ballston Spa, I still strongly support this initiative and look forward to seeing how it will positively impact families in our area.

[redacted]

March 14, 2025

Re: Support of Wildflower Upstate New York

Dear Committee:

I am writing to express my strong support for Wildflower Upstate New York, a proposed tuition-free public Montessori microschool committed to inclusion and equity by meeting the diverse learning needs of all students, particularly those with disabilities.

As a parent whose child is disabled, I can say unequivocally that it is imperative there be options for student-centered learning where disabled students interact with and learn in concert with their peers.

Wildflower Upstate New York will be an incredible asset to the community. As the founder of Inclusive Saratoga, a nonprofit consultancy that promotes disability inclusivity, I know that inclusivity is a key tenet of a healthy community. When programs such as Wildflower Upstate New York are designed with inclusivity in mind, everyone benefits.

Montessori education has long been recognized for its multi-sensory, hands-on approach, allowing children to learn at their own pace while receiving individualized support. The prepared environment, emphasis on movement, and multi-age classrooms make Montessori a natural fit for students with diverse learning needs, including those with learning disabilities, ADHD, autism, and other diversities.

Existing Montessori programs in Upstate New York are almost exclusively private and therefore inaccessible to many families—especially those who would benefit most from its individualized and child-led approach. The creation of Wildflower Upstate New York provides a much-needed public alternative, ensuring that students with disabilities, neurodivergent learners, and many others have access to a high-quality Montessori education regardless of their socio-economic status.

The proposed school is a step toward greater educational equity and aligns with state and federal goals of inclusive education. By integrating Montessori methods with specialized support services, they'll serve as a model for how public schools can embrace visible and invisible disabilities in support of a world where everyone can thrive.

I sincerely hope the SUNY Charter Schools Institute will approve the Wildflower Upstate New York application and support the mission of bringing a public, inclusive Montessori option to our community.

Kindly,

[redacted]

Meghan Connolly Haupt

Founder

Inclusive Saratoga | inclusivesaratoga.com | hello@inclusivesaratoga.com

SPINA BIFIDA ASSOCIATION OF NEW YORK STATE

3/18/2025

To Whom It May Concern,

On behalf of the Spina Bifida Association of New York (SBANYS) I am writing to express our strong support for the establishment of Wildflower Upstate New York, a tuition-free public Montessori micro-school. We believe that all children, including those with disabilities, deserve equitable access to high-quality education, and this school's commitment to Montessori principles coupled with an inclusive classroom model makes it an essential addition to our community's educational landscape.

At SBANY's we know families of children with disabilities already face significant financial challenges when it comes to accessing necessary therapies, services, and adaptive resources. Unfortunately, private Montessori programs, while highly beneficial for diverse learners, remain out of reach for many due to tuition costs. A tuition-free public Montessori charter school would eliminate financial barriers and provide families with the opportunity to access a rich, child-centered learning environment that is known for supporting children of all abilities. SBANY's and Wildflower Upstate New York's mission are closely aligned- ensuring that everyone-including those with disabilities- has a foundation for a successful future.

SBANY's mission is to build a better and brighter future for all those impacted by Spina Bifida. We achieve our mission through advocacy, education, clinical care, support and programs. Wildflower Upstate New York aligns with our mission because the approach to education is uniquely well-suited to serve students with disabilities. Its individualized, hands-on learning approach, multi-age classrooms, and emphasis on movement, sensory exploration, and self-paced progress align with best practices in special education. The collaborative co-teaching model, pairing a Montessori teacher with an Early Childhood Special Education teacher, ensures that children with disabilities receive targeted support while remaining fully included in the classroom community. This approach not only benefits students with disabilities but also fosters empathy, peer mentorship, and an inclusive mindset among all children. Additionally, Wildflower Upstate New York would be bringing Montessori to the public sector- as all current programing upstate is private.

For these reasons, we express our support for Wildflower Upstate New York and encourage the SUNY Charter Schools Institute to recognize the critical need for a tuition-free, inclusive Montessori option in our community. This school has the potential to provide children of all abilities with an accessible, enriching education that supports both academic and social-emotional growth, and we believe it will be a model for inclusive education that strengthens the fabric of our community.

Sincerely,

[redacted]

Julia Duff, Executive Director

[redacted]

LITTLE ONES MONTESSORI

March 17, 2025

To Whom It May Concern,

As the Owner and Director of Little Ones Montessori in Schenectady, NY, I am pleased to express my full support for the establishment of Wildflower Upstate New York, a tuition-free public Montessori charter micro-school in Ballston Spa. Our school has long been committed to providing high-quality Montessori education to children in our community, and we strongly believe in expanding Montessori's reach to ensure more families—regardless of economic status—providing further access to this transformative learning model.

While our school works to make Montessori education accessible through a sliding scale tuition model, we recognize that many families in our area still face financial barriers to enrolling in private Montessori programs. Bringing a public Montessori charter school to our upstate community would significantly increase educational access for families of all backgrounds, particularly those who may not otherwise have the opportunity to experience Montessori education. A tuition-free model ensures that more children can benefit from Montessori's child-centered, hands-on approach, which nurtures independence, critical thinking, and a lifelong love of learning.

The mission and vision of Wildflower Upstate New York align closely with the core values of Montessori education, emphasizing inclusion, equity, and individualized learning. As Montessori educators, we believe that every child should have access to a learning environment that honors their developmental needs, encourages curiosity, and fosters both academic and social-emotional growth. Expanding Montessori into the public sector is an important step toward ensuring that more families can benefit from this proven educational model. Courtney's team has been thorough in their collaboration with local Montessori programs such as ours to seek feedback on their curriculum portion of the application- and we were impressed with the great care taken in describing our shared philosophy of Montessori.

I fully support Wildflower Upstate New York in its efforts to bring public, tuition-free Montessori education to our community and strongly encourage SUNY Charter Schools Institute to approve this proposal. I look forward to seeing how this school enriches the educational landscape and provides more families with access to a high-quality, child-centered education.

Sincerely,

[redacted]

Jade Verrigni
Owner & Director
Little Ones Montessori School
www.LittleOnesMontessori.com

LITTLE ONES MONTESSORI

RiverRun Montessori

Peaceful. Positive. Powerful.

Dear SUNY Charter School Institute,

I am writing as a strong advocate for Montessori education. I was a credentialed Lower Elementary Montessori teacher for 12 years and have been a Montessori credentialed administrator for the past three years. While I have concerns about charter schools diverting funds from local public schools, I firmly believe that integrating an authentic Montessori curriculum into public education would greatly benefit children, families, the communities they serve, and school staff. Montessori education has consistently proven to be inclusive, developmentally appropriate, and socially enriching, fostering critical thinking, independence, and a strong sense of community. When children learn to collaborate, care for one another, and recognize the strengths of their peers, they enrich both their immediate and broader communities.

Courtney Soucy is deeply committed to the Montessori philosophy, which emphasizes inclusion, kindness, academic excellence, and peace through independence. Her dedication to obtaining Montessori credentials her staff demonstrates the long-term value of supporting high-fidelity public Montessori schools. The demand for private Montessori education and the commitment of exceptional educators to this model further highlight its proven success. I urge you to consider the transformative impact an authentic Montessori program could have within the public school system.

Sincerely,

Amy Klein
she/her/hers
Director
[redacted]

"A child who has become master of his (their) acts through long and repeated exercises, and who has been encouraged by the pleasant and interesting activities in which he (he, she they) has been engaged, is a child filled with health and joy and remarkable for his (their) calmness and discipline." —*The Discovery of the Child, Maria Montessori*

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www.RiverRunMontessori.org
210 Morris Road Schenectady, New York 12303

MARY BETH WALSH
Assemblywoman 112th District

THE ASSEMBLY
STATE OF NEW YORK
ALBANY

MINORITY LEADER
PRO TEMPORE

COMMITTEES
Judiciary
Ways and Means

March 20, 2025

To Whom It May Concern,

I am writing to offer my enthusiastic support for the establishment of the tuition-free, public Montessori charter micro school that Courtney Murphy and her team are working to create in our community. I believe that this initiative is a critical step forward in expanding access to high-quality, inclusive early education options for families in our region.

The mission of the proposed school—to provide a developmentally appropriate, Montessori-based education that meets the needs of all children, including those with disabilities and diverse learning needs—resonates deeply with me. Currently, Montessori programs are largely inaccessible to many families due to their private nature and associated costs. By creating a tuition-free, public option, this initiative not only expands the variety of educational choices available to families but also addresses the growing demand for innovative, high-quality education in Upstate New York.

I am proud to lend my support to this initiative and encourage you to consider endorsing it as well. I truly believe that this micro school will be a valuable addition to our region, helping to shape the future of education in a way that is equitable and accessible to all families.

Thank you for your consideration.

Very Truly Yours,

Mary Beth Walsh
112th Assembly District

ALBANY OFFICE: Room 446, Legislative Office Building, Albany, New York 12248 • 518-455-5772, FAX: 518-455-4650
DISTRICT OFFICE: 199 Milton Avenue, Suite 2, Ballston Spa, New York 12020 • 518-884-8010, FAX: 518-884-8041
EMAIL: walshm@nyassembly.gov

Gmail Courtney Murphy [redacted]

Support letter for Ballston Spa Montessori School

1 message

Lindsay Miakisz <[redacted]> Sat, Mar 22, 2025 at 7:22 PM

Dear SUNY Team,

I am reaching out to share my heartfelt support for the new Ballston Spa Montessori School, which is set to open in the fall of 2025 for children aged 3 to 5. As a 2nd grade teacher, I understand the critical importance of early childhood education and the foundational role it plays in a child's development. This new educational initiative holds great promise for our community, and I believe it is essential to recognize its potential impact.

One of the core missions of Ballston Spa Montessori is to foster an inclusive environment where every child can access the resources and support they need to succeed. This commitment to inclusivity is particularly important, as it ensures that all children, regardless of their unique backgrounds or circumstances, will have the opportunity to thrive. By focusing on the individual needs of each child, the school aims to create a nurturing and supportive educational setting where every child feels valued and empowered.

What truly distinguishes Ballston Spa Montessori from other educational institutions is its innovative approach to funding. This school will be tuition-free, a remarkable feature that is rarely found in early childhood education. Families with young children aged 3 to 5 should have the opportunity to access high-quality education without the financial burden of tuition fees. This accessibility will allow more families in our community to choose a Montessori education for their children, ultimately leading to a richer and more diverse learning environment.

Additionally, the welcoming atmosphere at Ballston Spa Montessori is designed to ensure that students feel recognized and appreciated for their unique abilities and talents. This focus on individual strengths will help foster self-esteem and a genuine love for learning among the students. By creating an environment where each child is celebrated for who they are, the school will encourage a positive and engaging atmosphere that promotes both personal growth and academic success.

Thank you for taking the time to consider this important initiative. I truly believe that Ballston Spa Montessori will make a meaningful difference in the lives of young learners in our community. As an educator, I am excited about the positive impact it will have on our children and families, and I look forward to seeing how it will shape their futures.

Warm regards,

Lindsay Miakisz

March 22, 2025

To the SUNY Charter Schools Institute,

I am writing to express my strong support for the establishment of Wildflower Upstate New York, a proposed tuition-free Montessori school. As a prospective parent of a child with a disability, I understand the critical importance of access to a high-quality, inclusive educational environment. Montessori education, with its unique and research-supported approach, aligns exceptionally well with the diverse needs of all learners, particularly those with disabilities.

Firstly, I believe Wildflower Montessori would provide essential educational equity to families facing financial constraints or limited access to quality educational options due to financial obligations. As a parent who is fortunate to have choices, I am concerned for those who must compromise on their child's education due to financial limitations.

Secondly, the proposed co-teaching model, featuring a Montessori-certified teacher alongside a special education teacher, is highly attractive. This collaborative approach would foster an inclusive learning environment where students are exposed to and appreciate both similarities and differences among their peers. Furthermore, it would ensure that my daughter, who has specific educational needs, receives the support necessary for her success.

Finally, the Montessori curriculum's emphasis on multi-sensory, hands-on learning is particularly appealing. My children thrive in environments that incorporate movement. I am confident that a Montessori curriculum would significantly enhance their learning experience.

I strongly urge the approval of Wildflower Upstate New York. This initiative represents a transformative opportunity for our community, providing equitable access to a nurturing, inclusive, and tuition-free Montessori education for children of all abilities, including my own.

Thank you for your time and careful consideration.

Sincerely,

Sarah Genevich

[redacted]

[redacted]

March 22, 2025

Board of Trustees
SUNY

To Whom it May Concern,

I am writing to express my enthusiastic support for Wild Flower Upstate New York Charter School and to share why this educational opportunity matters to me as a potential parent and member of the local community. As a new mother of a seven-month-old daughter, I am deeply invested in finding the best educational path for her future, one that will foster her growth, curiosity, and love for learning. After carefully reviewing the mission and vision of the proposed school, I wholeheartedly believe that this institution would be an invaluable addition to the region and a tremendous asset to our community.

The proposed Montessori Charter School's mission—to create an inclusive, empowering learning environment rooted in Montessori philosophy—resonates deeply with me. I am particularly drawn to the school's commitment to providing every child with access to the tools, resources, and support they need to thrive. As a parent, I want my daughter to grow up in an environment where her individual needs, interests, and abilities are respected and nurtured. The child-centered, hands-on learning approach described in the proposal aligns perfectly with my vision for her educational experience. The Montessori method's emphasis on self-direction, collaborative exploration, and the development of critical thinking skills would help foster a deep love for learning that lasts a lifetime.

In our area, there is a noticeable lack of educational opportunities that offer a personalized, hands-on curriculum—especially one that includes diverse learners and students with disabilities. The introduction of a Montessori school would fill this gap and offer families like mine an invaluable choice in education. Personalized learning is not just a luxury; it's a necessity. By tailoring education to each child's pace and interests, this school would empower children to learn at their own speed, whether they are excelling or need extra support. Furthermore, the school's focus on inclusion means that children of all backgrounds and abilities will be welcomed, creating an enriching environment where diversity is celebrated.

The benefits of an innovative and inclusive curriculum extend beyond the classroom. The proposed school has the potential to positively impact the entire local community by creating an environment where children from various walks of life collaborate and learn from one another. This sense of community, built on respect and shared values, will extend to families as well,

fostering stronger ties among neighbors and encouraging collective engagement in the educational process.

I strongly encourage SUNY to approve this charter school proposal. As a parent, I believe it is crucial to have access to diverse educational choices that align with the values we hold dear. The Montessori approach, which focuses on individualized learning and inclusivity, will provide our children with the foundation they need to succeed in both academics and life. It will also foster a sense of community among families, which will ultimately benefit everyone in the region.

This matters to me because, as a parent, I am constantly thinking about the best path for my daughter's education. I want her to attend a school where she will not only learn academically but will also develop the social and emotional skills necessary to navigate the world with confidence, empathy, and curiosity. The proposed Montessori Charter School will offer just that—a nurturing and dynamic environment that promotes growth, inclusivity, and a lifelong love for learning.

Thank you for your time and consideration. I wholeheartedly support this proposal and look forward to the possibility of this incredible school becoming a reality for our community.

Sincerely,

[redacted]

To Whom It May Concern,

I am writing to express my strong support for the establishment of Wildflower Upstate New York Charter School, a proposed tuition-free Montessori micro-school. As a speech-language pathologist with experience working with children of varying communication needs, I recognize the immense benefits of Montessori education in fostering language development, social interaction, and individualized learning. As a parent of a preschool aged child (5 by proposed opening in September 2026), I value the Montessori child-led learning approach as it very much aligns with the kind of educational experience I want for my child.

Montessori's hands-on, student-centered approach naturally supports language acquisition and communication skills. The emphasis on multi-age classrooms, peer modeling, and individualized pacing aligns well with best practices in speech and language development. Additionally, Wildflower Upstate New York's commitment to prioritizing students with disabilities ensures that children requiring speech and language services will be fully included in a supportive learning environment that meets their unique needs. As a parent and professional in the special education field, it is important to me that my child is exposed to and educated alongside students of all ability levels in a way that is truly meaningful to each student and fosters learning for all.

Access to a tuition-free Montessori education would be transformative for many families, particularly those who might otherwise struggle to afford such a high-quality learning experience. The integration of specialized support services within a Montessori framework provides an opportunity for children with communication challenges to thrive academically, socially, and emotionally. As a working parent, we have had to contend with rising prices of daycare and quality educational experiences that align with our values. A tuition-free Montessori option would open doors to more appropriate learning opportunities that we would otherwise have to forego due to budgetary constraints. I wholeheartedly support this initiative and urge SUNY Charter Schools Institute to approve its application, as it will fill a critical need in our community.

Thank you for your time and consideration. Please feel free to contact me if you require any further information.

Sincerely,

[redacted]

[redacted]

To Whom It May Concern,

I am writing to express my strong support for the establishment of Wildflower Upstate New York and its mission to provide inclusive, movement-based early education opportunities for all children, including those with special needs. As a licensed physical therapist with 25+ years of experience in pediatric habilitation and early childhood development, I have witnessed firsthand the profound impact that early access to high-quality education and movement-based learning can have on a child's physical, cognitive, language, and social-emotional development.

The early years of a child's life are critical for establishing foundational motor skills, including strength, balance, and coordination. For children with special needs, structured yet flexible environments that prioritize movement-based activities can significantly enhance their physical abilities, foster independence, and improve overall participation with family and peers in daily activities. Wildflower's emphasis on integrating movement into its curriculum aligns with best practices in child development and supports an inclusive learning model where all children, regardless of ability, can thrive together.

Inclusive, naturalistic educational environments not only benefit children with special needs, but also foster empathy, cooperation, and respect among all students. By supporting this initiative, we are taking a meaningful step toward creating a community that values diversity and ensures that every child has the opportunity to reach their full potential.

I wholeheartedly endorse the Wildflower Upstate New York and its commitment to movement-based, inclusive education. I urge decision-makers to support this initiative, as it will undoubtedly have a lasting, positive impact on children, families, and the broader community. Please feel free to contact me if I can provide any additional insight or support regarding the benefits of movement-based learning and inclusion in early childhood education.

Sincerely,

[redacted]

Physical Therapist

BARC
Ballston Area Recreation Commission

March 25, 2025

To Whom It May Concern,

On behalf of the Ballston Area Recreation Commission, I am pleased to express my support for the proposed Wildflower Upstate New York School, a tuition-free public Montessori micro-school seeking to serve families in Ballston Spa and the surrounding community. As a recreation organization dedicated to fostering physical activity, creativity, and a strong sense of community, we see a natural alignment between our mission and the Montessori approach, which emphasizes hands-on, exploratory learning, movement, and whole-child development.

Whether children are engaging in team sports, theater, mindfulness activities, or creative arts, they learn best through active participation, self-directed discovery, and collaboration—all of which are central to both Montessori education and the programs we provide at BARC. By encouraging children to explore their interests, develop confidence, and work together, Montessori education fosters the same well-rounded skill set that we promote in our recreation programming.

In a small-town community like Ballston Spa, partnerships between schools and local organizations are essential to creating rich, diverse learning experiences for our children. We believe that the Wildflower Upstate New York School will provide families with an additional high-quality option for early childhood and elementary education while strengthening the local network of educational and recreational opportunities available to students. We look forward to potential collaborations that would allow us to enhance programming, share resources, and work together to support the holistic development of our community's youth.

[redacted] [redacted]

BARC
Ballston Area Recreation Commission

We are happy to support Courtney and her team's commitment to bringing accessible, high-quality Montessori education to our town. We encourage the SUNY Charter Schools Institute to approve this proposal so that more children in our community can benefit from a school model that aligns so well with the values of creativity, physical activity, and community connection that we strive to cultivate every day.

Sincerely,

[redacted]

Nora Bishett
Executive Director
BARC

[redacted]

[redacted]

To Whom It May Concern,

My name is [redacted]nd I am writing in support of the introduction for a long-standing Montessori school located in my hometown of Ballston Spa, New York. Deep in my very soul, I believe Wildflowers Upstate New York is the absolute best option for our local young children. My family has a rich history of experiencing of availing our children to such educational prosperity. With regard to Wildflower , I have known its founder, Courtney Murphy for over twenty years. She truly lives to be an educator, so it came as no surprise when she introduced me to the school. I was thrilled to hear how far she has developed both professionally, and personally, and I think there is no better choice for someone to start this school than she. Below, please find my family's lived experience with Montessori schools:

As of now, my (almost) three year old niece is enrolled in a Montessori daycare in Queensbury, New York.At that young, ripe age, she is already speaking Spanish, using American sign language, and developing her French singing skills. I know people speak of their children as the pen ultimate in genius, but for this wonderful little girl, she really shows signs of true learning, understanding, and an appropriate level of a Montessori-education. I am happy to say she is light years beyond where one would assume her to be. I equate her current talents to that of her Montessori-type daycare. We couldn't be happier with our current experience, or any of those from the past! Ballston Spa touts itself both proudly, and (truthfully!) as a " Village of Friends." However, we are desperately lacking in early childhood development, and education. While our public schools for our older children are incredibly advanced, respected, and wildly open~minded, our current levels of educational offerings in our daycares and preschools need their own development.

Our children require time to develop their minds, bodies, souls, and energies just the same as we adults. Early learning is so very important, and when children miss, or experience a lack of true learning, it does nothing for them, but hold them back, which can bottleneck throughout the rest of their lives. Each and every moment during early schooling is unbelievably important, and when such moments aren't available at the highest levels, children are deeply impacted for the worse. Parts of education such as long, uninterrupted periods of playtime, engaging skill~building activities, gentle encouragement from our (fabulous) educators, compassionate teachings, and warm, inviting, and welcoming care, they either completely miss out on those important moments, or receive low quality levels of each aspect.

As our young children grow, they will ultimately need to be placed into one of our more traditional school settings, however, as Wildflowers grows, it will only be a natural next step to offer an educational setting for the proposed one hundred little ones from kindergarten up to sixth grade. I trust Wildflower will transition into the perfect place for its quickly growing student body. I deeply, from my toes to my top, ask SUNY CSI to fully approve the educational proposal of Wildflowers Upstate New York. I know I, and my family stand alongside, in full support of Courtney Murphy, and her Montessori school, Wildflower Upstate New York.

Very proudly, and sincerely,

[redacted]

To Whom It May Concern,

I am writing to express my strong support for the establishment of Wildflower Upstate New York, a proposed tuition-free Montessori micro-school that will provide families in our community with an innovative and inclusive educational option. As a parent, I believe this will expand school choice and offer something unique to our area.

There are not currently any tuition free Montessori schools in our area. This creates access for many families who otherwise wouldn't have the option to send their children to Montessori schools. A tuition-free Montessori school will remove financial barriers and allow more children to benefit from a learning environment that fosters independence, creativity, and a deep love of learning. Additionally, Wildflower Upstate New York Charter School's commitment to prioritizing seats for students with disabilities and creating a truly inclusive learning environment aligns with our community's values and the needs of local families. While many schools enroll students with disabilities, I haven't seen any that specifically state they are inclusive in their mission and vision statement.

Montessori schools nurture emotional intelligence, social Independence, creative learning, and, out of box thinking. As a parent of young children I feel the heavy responsibility to give them the best opportunity for success. I believe in a montessori approach and feel grateful that it could be accessible to families in my area.

I wholeheartedly support this initiative and encourage SUNY Charter Schools Institute to approve its application, as it will serve as a valuable asset to our community. Thank you for your time and consideration.

Sincerely,

Gmail [redacted]

Letter of Support

2 messages

Elizabeth Banos [redacted] Fri, Mar 28, 2025 at 1:24 PM
To: Courtney Murp[redacted]

Dear SUNY Charter Schools Institute,

I'm writing to you to approve the application for Wildflower Upstate New York, Montessori Micro-school. As a young mom, new to the area, looking for schooling for my toddler to attend in the near future is a top priority. I learned about the possibility of this school opening in 2026 through outreach and education on their social media pages and in local "Moms of" groups. It stood out to me for several reasons; (1) As a tuition free school it would allow my family to send my son to an early education program of interest while being a one-income family. (2) I'm drawn to the Montessori model for my toddler as it encourages independence and seeks to educate in ways that encourage natural instincts and methods. (3) Wildflower Upstate New York works off of an inclusive model, ensuring all children have the ability to attend. Empathy and inclusivity of people in all walks of life is important to me and something I want my children to understand as well.

As a prospective family wanting to enroll my toddler into this school if it opens, I strongly encourage you to accept this application.

Best,
Elizabeth M Banos

Courtney Murphy [redacted] Fri, Mar 28, 2025 at 1:34 PM

Thank you Elizabeth! We very much appreciate the support!
Courtney
[Quoted text hidden]

[redacted]

28th March 2025

Dear SUNY,

We are writing as prospective parents interested in enrolling our child[redacted]who will be 2 years and 11 months old by September 2026, at Wildflower Montessori School in Ballston Spa.

As a multicultural family raising our child bilingually, we were immediately drawn to Wildflower's unique approach to Montessori education, which combines a child-centered philosophy with a strong emphasis on inclusivity and community involvement. We truly appreciate how Wildflower Montessori creates an environment where every child, regardless of their background or learning style, feels supported and valued. It is clear to us that Wildflower Montessori will foster a love of learning and encourage self-direction, which aligns perfectly with our goals for Rocco's education.

Additionally, we are excited about the school's tuition-free model, which is an innovative approach, especially within the Montessori community. As most Montessori schools in Upstate New York are independent and tuition-based, we believe this model provides families with greater access to high-quality education without the financial burden. We deeply appreciate how this accessibility makes Montessori education more attainable for families from diverse socioeconomic backgrounds, while supporting the inclusive mission of the school.

Lastly, Wildflower's inclusive model, which ensures that students with disabilities can fully participate in the school community, resonates strongly with us. As parents, we believe in the importance of creating environments where all children can learn together, develop empathy, and build relationships regardless of their individual challenges. Having personally experienced the traditional education system with dyslexia, we wholeheartedly support and value Wildflower's commitment to promoting equity and supporting children with disabilities. We believe this approach will be invaluable in Rocco's future educational journey.

Thank you for considering our interest in Wildflower Montessori. We look forward to the opportunity to be part of such an inclusive and inspiring educational community.

Sincerely,

[redacted]

Gmail Courtney Murphy <[redacted]>

Hello from Wildflower Upstate New York!

[redacted] Sat, Mar 29, 2025 at 9:00 PM

Hi Courtney,

I am having trouble attaching files on my computer for some reason so i will copy and paste the letter below. I hope this will suffice.

Thanks so much!

[redacted]

To Whom It May Concern,

I am writing to express my strong support for the proposed tuition-free Montessori charter school in Ballston Spa, NY. As a prospective parent, I believe this school would provide an invaluable opportunity for families in our area seeking a high-quality, innovative education that is currently out of reach for many due to financial barriers.

I first learned about this initiative through a friend on social media, and I was immediately intrigued by Montessori's unique approach to education. The more I discovered about the child-centered curriculum, the more I realized how beneficial this model would be for children in our community—including my own. Unfortunately, the only current option for Montessori education in our area is private and costly. Additionally, the other pre-k options in our area are all very similar. Nothing necessarily 'stands out' about them individually- they're all more of a copy/paste pre-k program.

Having a tuition-free public Montessori school would provide equitable access to this proven educational method, ensuring that all children—regardless of background—have the chance to experience this independence based learning model. I also appreciate that the school would welcome students of all learning abilities, ensuring inclusive and individualized support for diverse learners.

As a parent I wholeheartedly support this initiative and encourage its approval. Providing more educational options strengthens our community and ensures that every child has the opportunity to thrive in a learning environment that best meets their needs. I look forward to the idea of one day sending my child to this school.

Sincerely,

[redacted]

Wood Road Elementary School PTA

300 Wood Road, Ballston Spa, NY 12020

3/29/2025

SUNY Charter Schools Institute
353 Broadway, Albany, NY 12246
Subject: Letter of Support for Wildflower Upstate New York

Dear SUNY Charter Schools Institute,

I am writing on behalf of the Wood Road PTA to express our support for the proposed charter school Wildflower Upstate New York in Ballston Spa, NY. As a lifelong resident of Ballston Spa and current president of our school's Parent Teacher Association (PTA) I believe that Wildflower Upstate New York has the potential to make a significant impact on the educational opportunities for the families in our community and beyond.

Our goal as a PTA is to ensure that every child is given the opportunity to make their potential a reality through advocacy, engagement, empowerment, and collaboration with our community and families. We see firsthand the correlation a strong and inclusive foundation is to the success of our students, and we are both eager and excited to see more opportunities for high-quality and inclusive education in our community.

As a Title I school, roughly 40% of our students are considered economically disadvantaged (with roughly 44% qualifying for free and reduced lunch) and over 100 kids are considered to be unhoused thus proving that our families are in need of affordable and accessible educational opportunities at the preschool level and beyond.

By offering a safe and inclusive educational space at no cost to families Wildflower Upstate New York will play a vital role in bridging the gap many of our families face when searching for opportunities to provide their children with the building blocks to achieve their full potential.

We strongly believe that Wildflower Upstate New York will be a valuable asset to the Ballston Spa community and we urge SUNY Charter Schools Institute to approve their proposal. I am available to discuss our support further and answer any questions you may have.

Sincerely,

[redacted]

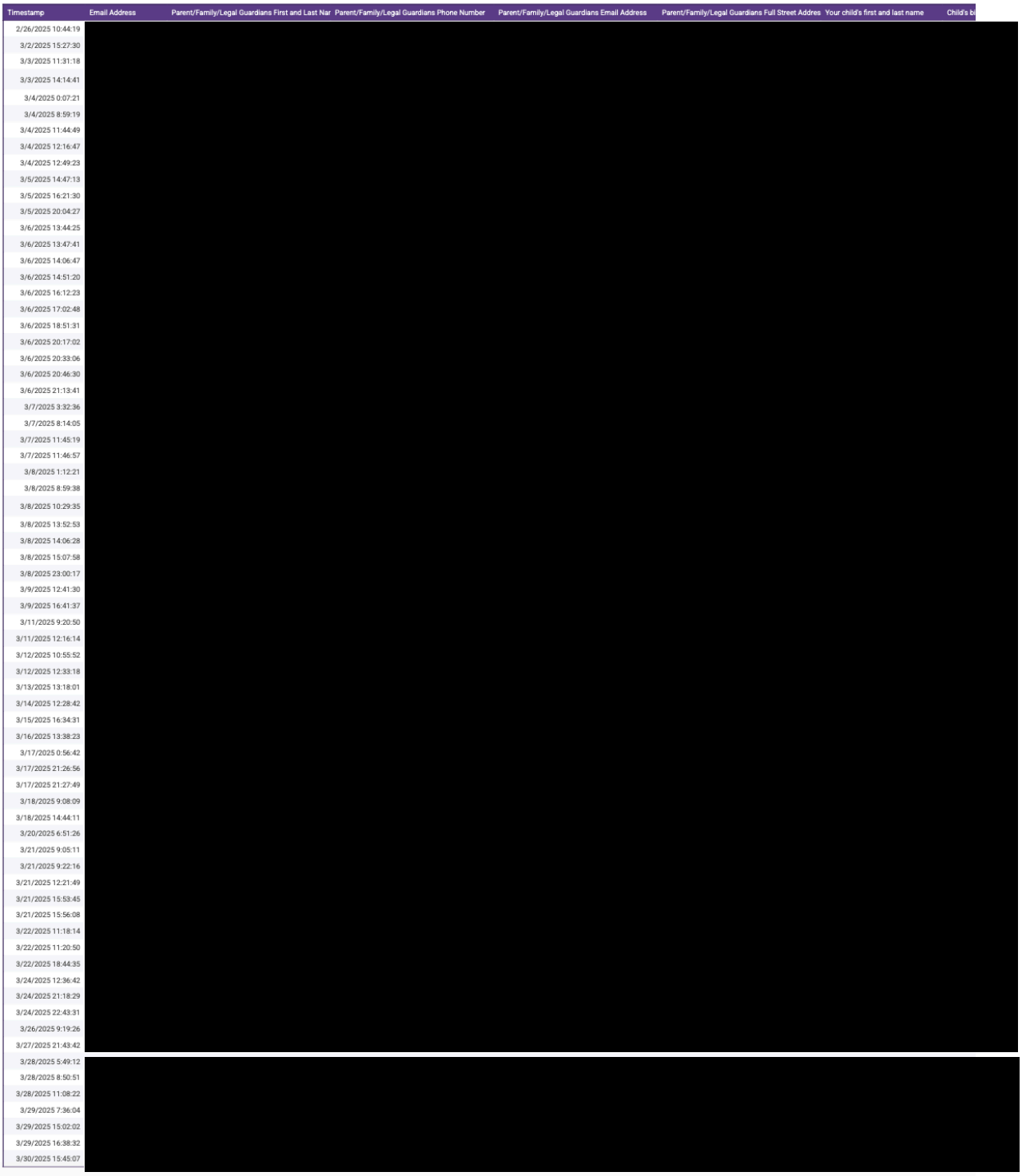
R-04f - Evidence of Demand

f. Evidence of Student Demand

The following pages contain the snapshot of our 68 interest forms completed by local prospective families. As each form is identical, we have provided one table row to describe each document and a snapshot of the overall responses.

In total, we gathered 68 forms, of which 57 families have students who would be of age to enroll in our first year of 16 students. We continue to receive between 1-2 forms daily as of April 1, 2025 and will continue to collect interest forms throughout this application phase.

Evidence	Page Number	Description
Interest forms from prospective families in excel format	2-3	Total spreadsheet of 68 families who expressed interest once we shared interest forms via social media from February 2025-March 2025
Email exchanges for families that opted into a discovery interview questionnaire by email. Some conversations with families occurred via phone, text, direct messaging on social media, or through friends of friends as information about our school spread by word of mouth.	4-13	Once families filled out an interest form, our team followed up via email if they selected 'yes feel free to contact me' and provided them with a questionnaire about their child, received feedback on our mission/vision, and made space for them to provide ideas for our proposal.


Timestamp
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Parent/Family/Legal Guardians First and Last Nar
Parent/Family/Legal Guardians Phone Number
Parent/Family/Legal Guardians Email Address
Parent/Family/Legal Guardians Full Street Addres
Your child's first and last name
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3/2/2025 15:27:30
3/3/2025 11:31:18
3/3/2025 14:14:41
3/4/2025 0:07:21
3/4/2025 8:59:19
3/4/2025 11:44:49
3/4/2025 12:16:47
3/4/2025 12:49:23
3/5/2025 14:47:13
3/5/2025 16:21:30
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3/6/2025 20:46:30
3/6/2025 21:13:41
3/7/2025 3:32:36
3/7/2025 8:14:05
3/7/2025 11:45:19
3/7/2025 11:46:57
3/8/2025 1:12:21
3/8/2025 8:59:38
3/8/2025 10:29:35
3/8/2025 13:52:53
3/8/2025 14:06:28
3/8/2025 15:07:58
3/8/2025 23:00:17
3/9/2025 12:41:30
3/9/2025 16:41:37
3/11/2025 9:20:50
3/11/2025 12:16:14
3/12/2025 10:55:52
3/12/2025 12:33:18
3/13/2025 13:18:01
3/14/2025 12:28:42
3/15/2025 16:34:31
3/16/2025 13:38:23
3/17/2025 0:56:42
3/17/2025 21:26:56
3/17/2025 21:27:49
3/18/2025 9:08:09
3/18/2025 14:44:11
3/20/2025 6:51:26
3/21/2025 9:05:11
3/21/2025 9:22:16
3/21/2025 12:21:49
3/21/2025 15:53:45
3/21/2025 15:56:08
3/22/2025 11:18:14
3/22/2025 11:20:50
3/22/2025 18:44:35
3/24/2025 12:36:42
3/24/2025 21:18:29
3/24/2025 22:43:31
3/26/2025 9:19:26
3/27/2025 21:43:42
3/28/2025 5:49:12
3/28/2025 8:50:51
3/28/2025 11:08:22
3/29/2025 7:36:04
3/29/2025 15:02:02
3/29/2025 16:38:32
3/30/2025 15:45:07

Age your child will be in Fall 2026	Current school your child attends (if any)	Primary language spoken at home	How did you hear about us?	What are your needs, hopes, and dreams for your	What kind of role would you like to play in your chi	I would be open to a discovery interview in which
[redacted]	[redacted]	test	test	test	test	Yes, feel free to contact me!
		English	Courtney Murphy	More freedom for my child to move around while l	Support system	Yes, feel free to contact me!
		English	Courtney Soucy	A diverse student body in which cultural differenc	Happy to support the school but would trust teacl	No thanks, but keep me posted on the application
		English	Social media	A school that recognizes my child as an individua	I would love to be involved in any capacity in whic	Yes, feel free to contact me!
		English/spanish	Sally F.	Free play mostly.	Volunteer whenever possible where I'm needed.	Yes, feel free to contact me!
		English	From the owner!	Helping social emotional	Any	Yes, feel free to contact me!
		English	Leah Ferrone	Curriculum that honors children from all backgrou	I would like to support their mission and staff as a	Yes, feel free to contact me!
		english	online	She loves art	Parent 🐱	Yes, feel free to contact me!
		English	Instagram	safe and comfortable environment, consistent rot	I would provide him with motivation and encourag	No thanks, but keep me posted on the application
		English	Friend	Welcoming, play-based setting with lots of opport	Volunteer in school/classroom, support learning a	Yes, feel free to contact me!
		English	Social media	Social emotional skills, gross motor, letter/numbe	Involved	Yes, feel free to contact me!
		English	Word of mouth via Social Media	Structured, causes students to grow, prepare stud	Would like to be invited into the classroom a few t	Yes, feel free to contact me!
		English	Ad	Confidence and emotional intelligence. Comfortal	I would like to create and allow for opportunities f	Yes, feel free to contact me!
		English	Fb	Play based	Volunteer	No thanks, but keep me posted on the application
		Bilingual English and Spanish	Facebook	Community centered, play based with a fo us in ki	Active	Yes, feel free to contact me!
		English	Facebook	A school that enriches children's minds and creati	An active role- I love teaching and kids. We are co	Yes, feel free to contact me!
		English	Moms group on fb	Collaborative child led program with individual stu	Active parent and supporter of teachers and class	Yes, feel free to contact me!
		English	Facebook mom group	A safe, fun, and transparent environment	I went to a Montessori school, so any volunteer op	No thanks, but keep me posted on the application
		English	Social media	Engagement, happiness and friendship	Anything I can	Yes, feel free to contact me!
		English	Facebook	To help her grow in what interests her	Unsure	No thanks, but keep me posted on the application
		English	518 Moms	Allowing children to learn through play, explorati	I would love to participate as much as able and al	Yes, feel free to contact me!
		English	Direct marketing	Socialization, learning	Continuing education at home - full time employe	No thanks, but keep me posted on the application
		English	Saratoga Moms Facebook group	Open communication between teachers and pare	I love knowing exactly how her day went, funny m	No thanks, but keep me posted on the application
		English	Facebook& instagram!	We love the Montessori approach and hoped for s	I would love to volunteer as much as possible! I ar	Yes, feel free to contact me!
		English	Facebook	Open play, exploration,	Hands on	No thanks, but keep me posted on the application
		English	Facebook	Not being in a classroom all day	Anything I can do to create a positive learning env	No thanks, but keep me posted on the application
		English	Facebook	Not being in a classroom all day	Anything to support a positive learning environme	No thanks, but keep me posted on the application
		French	Facebook	The perfect school creates a healthy environment	Active parenting with the help of teachers.	Yes, feel free to contact me!
		English	Social media	A place where her curiosity and creativity can be f	I imagine we will be active participants while trust	Yes, feel free to contact me!
		English	Facebook (all things Ballston spa	Something hands on for my son to be able to expl	I would like to be involved as much as the school Would let me :)	Yes, feel free to contact me!
		English	Facebook	Raya is very bright, so we want to see her enthusi	I can be as involved in Raya's school/education as	Yes, feel free to contact me!
		English	Facebook	Teaching values of kindness and respect for all	Active	No thanks, but keep me posted on the application
		English	Through a friend sharing your po	A welcoming nurturing school with teachers that l	Whatever is needed	No thanks, but keep me posted on the application
		English	word of mouth	I hope my child's school will encourage different v	my role would be to help her learn and grow and t	Yes, feel free to contact me!
		English	Facebook	I want a child led program that fosters the interest	Both of us work full time but would like to be well	Yes, feel free to contact me!
		English	Facebook	My dream for my daughter to experience a small c	Right now we are homeschooling her and my olde	Yes, feel free to contact me!
		English	Facebook Post on Saratoga Area	The perfect education setting for my child would l	Advocate, I'm involved as much as possible in my	No thanks, but keep me posted on the application
		English	FB group	Encourages imagination and growth. Supportive a	I don't know what my options are.	No thanks, but keep me posted on the application
		English	Facebook	Just that she will learn in a supportive environmer	Whatever role you need me to play. I'd like to be a	Yes, feel free to contact me!
		English	Social media	Small, intimate, non-intimidating environment.	Chaperone/Assistant/whatever need be	Yes, feel free to contact me!
		English	Friend	Outside play, using their imaginations, less rigid a	Being able to volunteer at times and attend activit	No thanks, but keep me posted on the application
		English and Spanish	Friend	Outdoor activities, foster curiosity, learning by exp	Takes a village. I want to be able to trust the scho	Yes, feel free to contact me!
		English	Instagram	I would want him to have the tools to excel in basi	Very active, currently a stay at home mom and wo	Yes, feel free to contact me!
		English	Instagram			No thanks, but keep me posted on the application
		FRANCAIS	My best friend's sister owns the c	A warm, welcoming, and inviting classroom, filled	A somewhat side by side role in the teachings of r	Yes, feel free to contact me!
		English	Facebook	A safe place where he can learn and socialize.	An active one. He is currently an only child and ho	Yes, feel free to contact me!
		English	Courtney's post in the BSpa Mom	I would love to talk more about this in conversatio	The primary role, active in educating during our tir	Yes, feel free to contact me!
		English	Facebook	Providing enriching experiences, cultivating imagi	helper, volunteer, and advocate	Yes, feel free to contact me!
		English	I'm the Board Treasurer - through	Respectful of differences, outside time when wea	Advocate	No thanks, but keep me posted on the application
		English	Facebook Group	A "curriculum" based on the individual, their intere	I would love to be an advocate & participant! I hav	Yes, feel free to contact me!
		English	Facebook.	I want to stay up-to-date in information for this sc	I am interested in being involved in the school's pr	Yes, feel free to contact me!
		English	Word of mouth	More social learning, more independent learning,	Not sure	No thanks, but keep me posted on the application
		English	Friend	I want my child to grow up in an environment that	I would reinforce the values and learning system t	Yes, feel free to contact me!
		English	Facebook	Culturally diverse, encouraging creativity & arts, er	I would love to be as involved as I could be! I am c	No thanks, but keep me posted on the application
		English	Facebook	Culturally diverse, encouraging creativity & arts, er	I would love to be as involved as I could be! I am c	No thanks, but keep me posted on the application
		English	Friend/word of mouth	I would love an environment where learning is fos	I would like to have input on what kind of curricul	Yes, feel free to contact me!
		English	Friend/word of mouth	I would love an environment where learning is fos	I would like input on what curriculum children are	Yes, feel free to contact me!
		English	Facebook mom's group for Sarat	A school that fosters independence, allows hands	Would like to be an active role, parents are their ki	Yes, feel free to contact me!
		English	Instagram	Not daycare, like school, you get to enjoy school a	Advocate	No thanks, but keep me posted on the application
		English	Social media	Cohesiveness with individualization and encourag	Present parent	Yes, feel free to contact me!
		English	Social media	A fun and comfortable environment with an emph	Hands on	Yes, feel free to contact me!
		English	Moms Facebook group	Hands on, peaceful, inclusive	Set her up for success by encouraging her to grov	Yes, feel free to contact me!
		English	Facebook group	I went to a Waldorf school from preschool through	I'd be interested in helping with field trips and outc	Yes, feel free to contact me!
		English	Storytime	A safe and nurturing environment, that allows for	I want to be very involved with their education, he	Yes, feel free to contact me!
		English	Mom's group on FB	A school that values God and Christian values. A	I would love to be involved, but I also work so it w	No thanks, but keep me posted on the application
		english	facebook	none electronic base. I would prefer hands on app	I will be a very active parent, who also works full ti	Yes, feel free to contact me!
		English	Facebook	We have been a Montessori school since birth, ou	Oshi is in a play based preschool currently and I s	Yes, feel free to contact me!
		English	Facebook	Small class size, abbreviated day option/home sc	Teacher, mentor	Yes, feel free to contact me!
		English	Friend	Nurturing, Safe and academically proficient.	Nurturing	Yes, feel free to contact me!
		English	Fb		-	Yes, feel free to contact me!

N [redacted]
to me

Sat, Mar 15, 12:53 PM

Hi! I'm sorry for the delay. Please find my responses in white. I hope this helps!

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?) The idea of inclusion and community resonates a lot with me. It can be a scary thought to send your babies off to a school in which you don't get to see what is really happening and going on. Learning through play is vital to small children and having a more open idea of what that looks like feels more appropriate, especially for kids under 6 who don't quite fully grasp what it means to be a student.

- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action? To me that feels like accepting children as they come and not expecting a stream-lined version of them. I think all kids have their own unique needs and yet go to school and are expected to all show up the same.

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school: Above all, a dream school for me is a place where my son can be safe and comfortable. Where he feels accepted and open to being himself. I would enjoy the option to come in and observe, help, read, etc and do whatever I can to assist the community.

4) What would an ideal educational experience look like/sound like/ feel like for your child? A place where he can learn through play and through experience. A place where he can go outside safely and learn in different environments. A place for friends, for a sense of welcoming, and community.

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):

7) What does community mean to you?
Community to me means trust, friendship and a sense of home.

8) Tell us about your child, especially as a learner. My son is a very hands-on learner. He is also an observer and doesn't necessarily act right away but instead takes his surroundings in. He is active and full of energy! He is fiercely independent and does best when given his own chance to try.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are some things that are going well at your child's current school?

10) How can school help your child to prepare for their future? My son has been home with me since he was a baby and is very attached. Helping him to ease into the education system is important to me. School should be a fun and safe place for them to build confidence and help find their passion.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years? I want him to feel safe and secure to be apart from me for longer periods of time and to enjoy being in a learning environment where he has friends and teachers that are truly rooting for him and in his corner.

12) Have you explored the various education models that are available to you based on where you live? I have and a lot of them are the same. It seems for smaller children there are really two options: a daycare or a preschool that has vague descriptions and honestly sounds just like another daycare.

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
- If so, what is your general availability/preference for a monthly meeting?

I have a mostly open schedule and would be willing to help in anyway I can! I think social media can be a powerful tool to spread the word, along with asking businesses within the community for help as well.

Gmail

Courtney Murphy [redacted]

Hello from Wildflower Upstate New York!

[redacted] Fri, Mar 28, 2025 at 3:15 PM

Hi Courtney and the Wildflower Team,

Thank you for reaching out and for the opportunity to share our thoughts. We truly appreciate the mission and vision of Ballston Spa Montessori and are excited about the possibility of being part of a community-driven school. Below are our responses to the discovery questions:

1) In reading your mission and vision:

What resonates with us?
We love the emphasis on inclusivity, empowerment, and Montessori principles. [redacted] an incredibly curious little boy, so the focus on hands-on learning, self-direction, and fostering a love for learning aligns perfectly with our values for his education. Additionally, as a multicultural family raising a bilingual child, we deeply appreciate the school's commitment to equity and belonging.

What may need to be adjusted?
We would love to see more details on how the school plans to integrate individualized learning paths, particularly for children who may have unique learning needs or strengths. Additionally, clarity on how the school will foster social-emotional development alongside academics would be helpful.

2) An inclusive school model would look, feel, or sound like:

It would be a space where all children feel valued and seen—where diversity in learning styles, backgrounds, and abilities is not just acknowledged but fully embraced. It would feature flexible teaching approaches tailored to each child's unique personality and needs, abundant accessible materials for hands-on learning, a diverse team of teachers representing different races, cultures, and backgrounds, and a curriculum that integrates a wide range of perspectives.

3) Our hopes and dreams for [redacted] ucational experience:

We want a school where he feels safe, encouraged, and challenged. Our dream school would be a place where curiosity is nurtured, creativity is celebrated, and children are empowered to explore their interests at their own pace. We hope for a strong sense of community, small class sizes, and teachers who foster independence while providing support when needed.

4) An ideal educational experience would look/sound/feel like:

- **Look like:** Warm and inviting. Lots of light wood, plants, warm lighting (no hospital lighting).
- **Sound like:** Tons of laughter and music in different languages.
- **Feel like:** Soft. rounded corners, warm wood to the touch, rugs, pillows, dream-like atmosphere.

5) Best experiences with school:

For me, the best school experiences were with teachers who took a personalized approach, from high school through my master's degree. I still keep in touch with those teachers and often reflect on the impact they had on my learning. For [redacted] is best moments so far have been when he's challenged and engaged—he thrives in outdoor, hands-on learning environments where he has the freedom to explore.

6) Worst experiences with school:

Rigid, one-size-fits-all curriculums that lack individualized learning have been frustrating for us in the past. My husband, who has dyslexia, had a difficult time in school when he was treated as though something was wrong with him instead of being supported in the way he needed. We are both very creative, so environments that stifle creativity and expect students to conform to a single learning style have been particularly challenging. With [redacted] ve experienced difficulties when he hasn't been adequately stimulated at daycare, which has sometimes led to frustration and acting out at home.

7) What does community mean to us?

Community means support, inclusivity, and shared responsibility. It's about fostering connections, celebrating differences, and working together toward common goals.

8) About [redacted] s a learner:

[redacted] naturally curious, hands-on, and thrives in environments where he can explore and problem-solve. He moves from one thing to the next very quickly, enjoys creative projects when initiated by him - we have had issues with teachers at daycare forcing paint on his hands, for example. He also loves music. He can be stubborn and independent so he benefits from "structured freedom"—if that's a thing.

9) Current school experience:

[redacted] urrently attends daycare, and while he enjoys certain aspects, we have noticed challenges when he hasn't been adequately stimulated. However, we appreciate the social aspects of being surrounded by other children.

10) How school can help prepare [redacted] or the future:

By teaching critical thinking, emotional intelligence, adaptability, and collaboration. We also want him to develop confidence in his abilities and a lifelong love of learning.

11) What we want [redacted] o know/feel/learn through elementary years:

- **Know:** How to think critically, express himself, and approach learning with curiosity.
- **Feel:** Confident, supported, and valued for who he is.
- **Learn:** Problem-solving skills, self-discipline, creativity, and empathy for others.

12) Have we explored various education models?

Yes, we've looked into Montessori. We are drawn to Montessori for its child-led, hands-on approach.

13) Spreading the word & Community Design Team involvement:

We would love to help spread the word through local parent networks, social media, and community events. We're interested in the meetings and would prefer evening or weekend sessions for scheduling.

Thank you for this thoughtful approach to community-driven education! We're excited to see how the school develops.

Best,

[redacted]

On Mon, Mar 17, 2025 at 9:42 PM Courtney Murphy [redacted]
[Quoted text hidden]

[redacted]

[redacted]

Sun, Mar 23, 4:20 PM (9 days ago)

to me

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?)
- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?

For it to be inclusive, I'd like to see students with disabilities or impairments, as well as typical developing and accelerated developing kids. Also, as a parent with a kid with a disability, I'd like to know your procedures for the kids and what to expect before making a decision.

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school:

Dream school : Full day but with breaks or rest time included. Breakfast/lunch included and they would be whole/real foods with less packaging. Kids have time to learn and play with kids of their own ages and other ages.

4) What would an ideal educational experience look like/sound like/ feel like for your child?

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):

7) What does community mean to you?

Parents and students know one another. Parents talking to one another during pickup.

8) Tell us about your child, especially as a learner.

[redacted] she has visual impairments and developmental delays. It takes her a lot longer to pick up skills than her peers, but usually eventually gets there. She needs a lot of repetition to pick up things. She love to be silly and have fun and giggle. She also really loves music, dancing and noise. She loves a "thrill" like sliding fast, hearing kids scream, or swinging.

[redacted] only a year but loves to watch and copy his sister. He is more physical, and likes to carry things around and climb.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are some things that are going well at your child's current school?

[redacted] special needs pre-school with a LOT of support for her. She has her services (speech, pt, ot, vision therapy) right at school and they have such a great support system for the kids. They also communicate with parents very well.

One thing we love is the calendar they have with the expected events for the month.

10) How can school help your child to prepare for their future?

Help them establish some routine with regards to hanging up backpacks, what to expect on a school bus (bucking seatbelts, etc.), how to sit during circle time/how to behave.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years?

Feel loved, proud of themselves, independent, have good self-esteem.

12) Have you explored the various education models that are available to you based on where you live?

No, I haven't.

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
- If so, what is your general availability/preference for a monthly meeting?

I think what would be most helpful for me, or what I think would be helpful if I were on the team, is a survey of questions to be answered before a meeting.

C

Courtney Murphy [redacted]

Sun, Mar 23, 8:13 PM (9 days ago)

to David

Thank you for this survey! It helps us flush out ideas for our proposal and think through further support for kids, especially those with disabilities. Can you share more about what you mean by "Also, as a parent with a kid with a disability, I'd like to know your procedures for the kids and what to expect before making a decision."

This helps our team develop proper messaging and protocols to ensure ALL families feel they belong at our school. We utilized your recent instagram feedback to state explicitly that we are inclusive- and provide services to students with disabilities. I'm curious to hear more about this phrase above! Thanks Sarah- we appreciate it. Whether or not you attend our school, it will help us to develop a great program for you and/or those who do join us!
Courtney

D [redacted] Tue, Mar 25, 6:31 AM (7 days ago)

Hi Courtney!

Yes, I'd love to explain. Even as a teacher, when we started determining my daughter had some special needs, I had no idea of the process how everything goes. I guess what I wanted to see when I was researching places for my daughter were "What does it look like if my daughter went through Early Intervention / has an IEP," "when should I call?" Those types of FAQs that you would like to see answers for before deciding to go on a tour etc. Knowing how a school (or childcare) was going to welcome (or not) any services was helpful. I knew if they didn't have a plan in place for services, that it wasn't going to work out. Also, I'm in the stage of "what happens next..." so I think that could help. Just knowing how my time at Wildflower, or elsewhere was going to segue into the next chapter.

Hope that helps!
[redacted]

C **Courtney Murphy** [redacted] Tue, Mar 25, 10:23 AM (7 days ago)

Hi again,
Yes, yes this all makes sense. This is very helpful- especially as a former sped teacher turned school director- I want to make sure families are well aware of all processes related to special education. First- I'll name we are a public school that legally must provide services. Some folks have heard 'charter' and misconstrue this to mean 'private.' Charter schools are public schools.

I'm drafting this email as I hope this helps in your journey either with us at Wildflower or wherever you end up- my hope is that one day ALL students with disabilities are provided all necessary services in any space they go to. Here is how I would answer regarding Wildflower Upstate New York, and keep in mind any public school MUST be providing your daughters service through her IEP. It is when you get into private schools that these things vary- as IDEA (Individuals with Disabilities Education Act) is a federal law that applies to public schooling.

Let me know if this answers your questions and if any more arise! In short: our school was designed with kids like your daughter in mind. We would be happy and lucky to support her in her educational journey. Students with disabilities should not be treated as an afterthought, and schools should not be scrambling to 'react' when a student with a unique IEP enrolls. Our school is proactively designing classrooms with children like yours in mind at the start. It begins with conversations like this, and for that I am thankful you're helping us in our planning through ongoing communication!

Wildflower Upstate New York's mission and vision was created specifically with students with disabilities in mind. We understand how important it is to ensure your daughter receives the services and support she needs as she transitions into school programs. Below are answers to some frequently asked questions:

1. What does it look like if my daughter has an IEP or received Early Intervention services?

If your daughter has an **Individualized Education Program (IEP)** or has received **Early Intervention (EI) services**, we will work closely with you to ensure a smooth transition. Here's what to expect:

- **For students transitioning from Early Intervention (EI) to preschool special education (CPSE):** The **Committee on Preschool Special Education (CPSE)** will determine the next steps for services as she enters preschool. Wildflower Upstate New York will collaborate with the CPSE team to implement all legally mandated supports.
- **For students entering kindergarten or beyond with an IEP:** Our school will **review her current IEP and partner with the Committee of Special Education** and meet with you to discuss how we will provide the services outlined in the plan, such as speech therapy, occupational therapy, physical therapy, or specialized instruction. Your daughter again is legally mandated to receive these services. We will work with the school district to contract any related therapies required. Additionally, pro-actively in hopes of creating inclusive classrooms, each classroom at Wildflower will have one Early Childhood Special Education teacher and one Montessori credentialed teacher, as well as a teachers assistant. We will serve no greater than 20 students in each class. By staying small, we ensure all students receive the individualized attention they deserve and need.

2. When should I contact the school regarding services?

It's best to reach out **as early as possible**—ideally before enrollment or during the application process. This allows us to:

- Review your daughter's current **IEP or evaluation reports**
- Discuss available **support services and accommodations**
- Schedule a time for you to meet with our **special education teacher and/or support staff** to address any specific concerns

If you're considering a **tour**, we can also arrange for you to meet with a special education team member or director (who is a certified special education teacher in NY state), to discuss how we integrate services *within* our classrooms. To the greatest extent possible, we encourage students and support staff to provide their individualized services to the greatest extent possible within our classroom space. This builds empathy between other students and reinforces Montessori's principles around individualized attention.

3. What services and supports are available?

As a **public school**, we are legally required under the **Individuals with Disabilities Education Act (IDEA)** to provide a **Free and Appropriate Public Education (FAPE)**, meaning:

- **All services in the IEP will be implemented as required by law**
- If your daughter qualifies for **related services** (e.g., speech, OT, PT), she will receive them as we partner with the Committee of Special Education
- She will be educated in the **Least Restrictive Environment (LRE)**, meaning she will have opportunities to learn alongside her peers with appropriate support as often as possible.

4. What happens next?

If you decide to enroll, the next steps will include:

1. **IEP Review Meeting:** Our team will meet with you to go over your daughter's IEP, discuss placement, and ensure her needs are met.
2. **Service Implementation:** Once school begins, she will start receiving services as outlined in the IEP.
3. **Ongoing Communication:** We will keep in regular contact with you about progress, and you'll be invited to **annual IEP meetings** to review and update goals. Three times a year, Wildflower Upstate New York will have family conferences- and at this same time you will be provided with progress notes towards your daughter's IEP goals and be able to pose any questions related to her services.
4. **Future grades:** Montessori grade bands span three years. This means your daughter would be with two teachers across a three year span. We chose Montessori curriculum and grade bands because we feel relationship building is made stronger when teachers 'loop' (follow) children across multiple years. This helps all students, but especially those with disabilities, as teachers and students get to know each other on a much deeper level over the years. Your daughter would be in a primary program (ages 3-5), followed by a lower elementary classroom (1st-3rd grade) followed by an upper elementary classroom (4th-6th). At which point students then flood into their home district Middle schools. We are a pre-k-6th grade school. She would receive all necessary supports in each grade, and have yearly IEP meetings during this period.

5. How does our school welcome students with disabilities?

We are committed to **inclusive education** and believe that all students thrive in an environment that values **individual strengths and diverse learning needs**. Our staff receives training to support students with disabilities, our co-taught model involves one Montessori credentialed teacher and one special education teacher, and we prioritize collaboration between teachers, families, and service providers. We will also partner with Inclusive Saratoga, a company that works to ensure people with disabilities are welcome and able to participate in all spaces. Inclusive Saratoga will do classroom visits in our year 0 planning stage as well as throughout upcoming years periodically to ensure our spaces not only meet ADA (Americans with Disabilities Act) compliance but also in general are accessible to students with varying needs.

I hope this answers some questions for you regarding our school model! I could talk about sped all day- so even if you are on the fence about our program and unsure where you'll end up- please don't hesitate to reach out if you have questions or want me to take a look at other locations and provide any guidance I can to make sure your family is well supported. My daughter Rudy has an IEP, and it is an often confusing process (so many acronyms?!) and I love helping any way I can.

Courtney

D [redacted] Wed, Mar 26, 6:30 AM (6 days ago)

Thank you! This is helpful! We've become a lot more knowledgeable about the subject, but it's helpful to have more. Our experience is with the county/school district so it's helpful to have 3rd party input to be fully informed. I just know I felt SO lost at first -- we didn't know ANYTHING (plus living in VA at the time, things were a bit different). We never even heard about Early Intervention!!! CRAZY!

[redacted]hink my mom said your mom told her you bought a house nearby? We gotta get the kids to the [redacted] a playdate once it's finally warm enough!!

•••

C Courtney Murphy [redacted] Mar 26, 2025, 11:01 AM (6 days ago)

Thanks! Yeah basically how a charter school works is any mandated services we contract with Ballston Spa Central school district as we'll be a public school in the same district. I was lucky (?) enough to be a sped teacher prior to giving birth [redacted]

[redacted]

Courtney

•••

E [redacted]

Tue, Mar 25, 2:54 PM (7 days ago)

Courtney,

If you need a letter of support, please let me know who to make that out to and any other details to send one your way.

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?) Inclusivity, access, community and empowering learning
- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action? A school that values parent and community input but has the children in mind at its core

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school: I want my child to feel comfortable and enjoy schooling... hoping he connects education/school in whatever form to something positive and feels empowered to grow and learn.

4) What would an ideal educational experience look like/sound like/ feel like for your child? He enjoys being independent and doing new things, loves reading/nature/ and music and loves helping others. I'd love to see him grow in his interests as well as learn new things all while interacting with other children and being involved in a community.

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school): When I was in playschool I came home to my mom and told her I wanted to learn more than just color and sing. She took me to a child psychologist who did some quizzes and I was able to start Kindergarten a year early with her help and support. I always loved school and she encouraged me and didn't dismiss me as a toddler not knowing what I wanted. I hope to do the same for my child in whatever he chooses to pursue.

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school): [redacted]ast fall as it was a short program there wasn't much time to experience any negative impacts. I'd say for me it's either being bullied by others or not having teachers that support individuals needs as best they can.

7) What does community mean to you? support, working together with others to achieve common goals or interests. Sense of belonging.

8) Tell us about your child, especially as a learner. He is an observer first, slow to warm up but he loves to read books with us and learn new things. He is very independent and wants to do almost everything on his own if he could.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are some things that are going well at your child's current school? Does not currently attend any type of schooling

10) How can school help your child to prepare for their future? I value my education and think it is important for children to grow and learn about themselves and the world around them. I hope it prepares him in many ways but mostly helps him figure out what his interests are as he grows up, gives him empathy towards others and the world around him and allows him to be confident in making informed decisions about matters important to him.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years? to know they're safe and able to learn in a safe environment to feel confident and empowered in learning new things

12) Have you explored the various education models that are available to you based on where you live? [redacted]t have been looking at various models

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
○ If so, what is your general availability/preference for a monthly meeting? Email works fine for me. Currently my availability is Mon-Wed (possibly other days if meetings would be in walking distance and children allowed)

[redacted]

[redacted]

Tue, Mar 25, 10:59 AM (7 days ago)

Hi Courtney!

I am so excited about the creation of a Montessori school! [redacted]o young to attend at this time, but I would love to stay informed about what is happening. Let me know how I can assist, please.

Our mission at "*Ballston Spa Montessori*™ is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where *every* child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that *every* student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at "*Ballston Spa Montessori*™ is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?)

- Having a sense of belonging resonates with me because each child will have their differences (culturally, mentally, and physically). This mission states a unique space is being created where all students are welcome and their educational needs are met.

- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

- At this time, I do not believe anything needs to be adjusted in the mission statement. My child is 1, so we are still in the process of learning what his needs and wants are.

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?

- One that would be tailored to the community. Inclusive means that all children are welcome. This school model would be complementary for all students regardless of their learning needs.

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school:

- An inclusive and culturally diverse school that will go the extra mile to celebrate and honor others (Chinese New Year, Black History Month, Hispanic Heritage Week, etc.).

- A curriculum that offers advanced learning, as well as the opportunity to address my child's specific needs.

4) What would an ideal educational experience look like/sound like/ feel like for your child?

- An ideal educational experience would create an atmosphere that is conducive to learning with smaller classes. This setting would create a learning plan that is specific to my child's needs to help them as they navigate new topics.

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):

- My best school experience was attending boarding school during my high school years. I loved how small the classrooms were. It allowed no child to be left behind.

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):

- My worst school experience has been the lack of diversity in the classroom. This led to issues with negative self-image and limited opportunities to learn about different perspectives.

7) What does community mean to you?
- As a transplant to the Upstate NY region, community means a lot to me. Community means having a support system that is willing to go the extra mile to assist you and your family. It allows learning about others while sharing cultural differences.

8) Tell us about your child, especially as a learner.
- My child is 1 and is learning. I try to help my child meet milestones to the best ability.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are some things that are going well at your child's current school?
- My child is in daycare. I am interested in the Montessori aspect of this school and would love the opportunity to help in any way I can.
10) How can school help your child to prepare for their future?
- School helps to build the foundation needed for a child to excel in the world.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years?

- I want my child to learn mathematics and reading. Literacy is important. In addition, I am interested in my child learning emotional intelligence. I believe communication and literacy will take children far. I want my child to learn how to be accepting of others.

12) Have you explored the various education models that are available to you based on where you live?

- Yes, I continue to explore options in the area.

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?
○ If so, what is your general availability/preference for a monthly meeting?

- Yes, I am interested in joining the meetings and helping in any way I can. My availability is M-Th after 6 PM. Fridays and weekends are flexible.

[redacted]

[redacted]

Sat, Mar 22, 9:09 AM (10 days ago)

Hi Courtney & Wildflower Team,
Please see attached he's responses
Let me know if you have any further questions or if there is any other way you are looking for community involvement

Best,
Amanda

1) In reading our mission and vision:

- What resonates with you and feels right? (Why do they resonate with you?)
  - "Self-direction", "collaborative exploration", with inclusivity, access, & compassion. Are all values we hold in our family. Learning & growing is a self-driven path but is heavily influenced by those around us. With just the right balance of guidance and collaboration we can find a sweet spot of actualization, confidence, & fulfillment. In a world filled with limited resources, access, barriers of all kinds the community must come together to find access and act with compassion for the sake of our children, adults, and future world.
- What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)

Respect is a focus in our family for ourselves, each other , & our environment. That includes recognizing our emotions/needs how we can work through them, & recognize others emotions/needs. We also spend time acknowledging our need to respect our environment either our bedroom, living space, or physical earth, developing gratitude for what we have inside & out.

2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?
One thing when I first heard of the school is HOW can Montessori be inclusive. I have done all the research and found these schools hard to access both financially & in location. So the shock (and excitement) came when I saw your school. Largely inclusivity is all of the Saratoga population having the option to send their children here. How that can happen I don't know but that's inclusive- indiscriminate of race, sex, financial means, location.
3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school:
A school that works with my son, focusing his curriculum, his needs for growth, learning, & social skills. A school that focuses learning through experience & collaboration. A school that welcomes creativity and lessons on the real world. A school that is enriching, stimulating, without compromising traditional learning needs (letters, numbers, shapes, words,etc.) A dream educational experience would be focused on the child's Individual success without standardized tests & stressful expectations of fitting into a "student mold".
4) What would an ideal educational experience look like/sound like/ feel like for your child?
It would be filled with experience, through play, through observing, using all five senses to learn new challenging lessons. Lessons would not evolve around a schedule rather a sliding scale of mastery, and Individual curve. I[redacted]d has limited time to sit & learn - a structure to having to this time period is expected & welcomed but not the sole focus of the day. Currently he gets overwhelmed when a room is overly loud or excited so I hope the learning environment respects a level of calmness. Overall the day would have a fine balance of structure & flexibility.
5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):
For me having opportunity for creativity was always the best part of school.
6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):
Where to begin… schools often let the children who are doing just fine, who are not challenged, but who also excel to the side as they are not a concern. There's also a huge lack of resources and attention for a child as a being, a lack of focus on the whole being. My schooling very much focused on passing, and because I was more shy & reserved and excelled and fine I did not get further support. Support only came to those who failed or asked for it themselves (which is far too much of a burden for a child).
7) What does community mean to you?
Community is support, understanding, compassion. It's being a unit, meeting each other where they are at, uplifting each other, learning with each other, respecting each other. Community is all inclusive & does not discriminate. It is a structure, a resource, a stability.
8) Tell us about your child, especially as a learner.
[redacted]st learner, quick to pick up on things. An observer, often I find he takes in WAY more than I even thought or intended. He learns through play, experience, and observing. He LOVES books and we tie a lot of what we learn in books to our real life learning and experiences. We try to get outside as much as possible & spend a lot of time with our family- he is connected to his family & is eager to tell them the things he learns.

9) Do they currently attend school? If yes: What are some things that are challenging about where your child currently goes to school? What are some things that are going well at your child's current school?

[redacted] not currently go to school. He does "go to" "mama school". I have intentional monthly/weekly focuses and a few planned/placed activities. We do a letter & number each week. But it is all fluid & based in play- our actual sit down time is only 10 min. The current challenge is he is very smart (I know that sounds ridiculous and "parent" of me) and has learned more than the typical child his age so I have difficulty finding things to challenge/stimulate him. The next things we want to work on are more social skills- which is where school will play in. We do go to the library & park, etc. but are not always financially able to attend social groups.

10) How can school help your child to prepare for their future?

Right now school can help with learning about other humans, social skills, and respect for others. Two years old is an emotional age with a lot of self learning & growth- having other children around (and adults too) that are not in his family will be extremely helpful.

11) What do you want your child(ren) to know/feel/learn as they move through their elementary years?

I want [redacted] feel seen, supported, and joyful. With of course knowing basics of education. Overall I want him to feel confident, capable, and know any school/learning is fun!

12) Have you explored the various education models that are available to you based on where you live?

We have- the desired models including Montessori, farm schools, and independent schools were desired but ultimately not accessible due largely to finances and location. We did try a Waldorf group once and quickly found it was not a good fit for max due to the lack of structure.

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings?

○ If so, what is your general availability/preference for a monthly meeting?

Direct emails/newsletters are the best way to spread the word! I would love to be involved especially if virtual access to meetings are available. Nighttime is the best for meetings- again availability will be based on virtual/in-person options

Sent from my iPhone

C **Courtney Murphy** [redacted] Sat, Mar 22, 9:25 AM (10 days ago)

Thank you so much for all the detail provided in your discovery questions [redacted] joyful. We are creating this school after my own experience sending my daughter to Little Ones Montessori in Schenectady. [redacted] but when she was there age 3-5 she was truly seen, supported, and joyful.

I will be keeping in touch regarding the future next steps with our school. When you asked 'HOW' can this be tuition free and inclusive, I can tell you! We are in the application phase through SUNY Charter Schools Institute to apply for a charter. This would allow our Montessori micro-school to be tuition free for ages 4+. I do want three year olds to enroll, but NY doesn't currently have universal pre k for them, so we would be tuition based at age 3. I say this to be fully transparent. However, we will also apply for grants and fundraising efforts in hopes we can either produce a sliding scale tuition based on folks' level of need and/or cover the tuition if approved for enough through grants/fundraising money.

In the meantime, would you be comfortable submitting a letter of support for our school to SUNY? It would essentially be an email naming why this school feels unique and special to you/our area- what made it stand out (you mentioned above) and naming you're a prospective family. This helps SUNY to see we've gathered enough community interest and hopefully helps us to be approved!

Let me know if you have questions- or if not, feel free to draft an email and I can take a look!

Courtney

•••

J [redacted]

Sun, Mar 16, 3:10 PM

Courtney and the Wildflower Team,

I hope you find our input helpful. Please feel free to follow up with any further questions about what we are looking for, about our daughter, or whatever else might be needed in this process. Thank you!

1) In reading our mission and vision, What resonates with you and feels right? (Why do they resonate with you?) What may need to be adjusted to feel the needs/wants for your own child? (What could be adjusted?)
2) When you hear we are developing an inclusive school model- what would that look, feel, or sound like in action?
The first thing that sticks out to me when reading your mission is "inclusivity," and as a former pediatric physical therapist, I see a lot of value in this. I know it can mean many things, but to me it means allowing children of all different levels (physical, emotional, intellectual) to be included in the same environment, under the same social expectations, and to learn to be together. I think this is important in today's world to help reduce or prevent bullying, being afraid of people/choices that are different than our own, and in making children (and their older selves) more confident with self-expression and self-worth. Of course we also appreciate hands-on learning and self-direction because we look forward to Raya being a confident, direct and assured, explorative, and inquisitive little girl. We appreciate the Montessori method for its non-conventional approach to education.

3) What are your needs/hopes/dreams for your child's educational experience? Don't hold back! Describe your dream school:
We [redacted] to novel experiences so she can discover her strengths and interests outside of her normal environment.

4) What would an ideal educational experience look like/sound like/ feel like for your child?
We appreciate the importance and benefits of a standard learning environment and expect Raya to participate in the public school educational program in her early years. However, we want her preschool (and possibly kindergarten) program to go a bit further than that. We want a program that recognizes and builds on each individual child's strengths and interests, and also helps discover her areas of need/weakness and helps to address those in an age-appropriate manner. We do not want to see [redacted] confidence or self-worth diminished because of possibly having a different learning style or pace. We also want regular communication with [redacted] teachers and support staff.

5) What have been your best experiences with school (either for yourself or your child thus far if they attend school):
At an early age, my artistic abilities were identified and encouraged by my mother. In later school years, my school setting also allowed for growth of my creativity. I ended up participating in art clubs in middle and high school and taking advanced art classes in high school, some of which even carried over to college credit. I look forward to learning what [redacted] ique interests, hobbies, and skills are. I hope for a school program (especially when she's so young) that helps identify these things by exposing her to variety, novelty, and self-direction in an exploratory environment.

6) What have been your worst experiences with school (either for yourself or your child thus far if they attend school):
[redacted]

8) Tell us about your child, especially as a learner.
As I write this email, [redacted] She is a very bright, rather advanced, little girl. She runs, jumps, dances, sings, negotiates stairs, climbs, [redacted] basic colors and shapes, how to independently count 1-20 (mostly), identifies A-to-Z and sings many songs and nursery rhymes herself. She has an impressive vocabulary, articulates quite clearly, and utters basic sentences without the need for much adult modeling. [redacted] eming to grasp new concepts after minimal instruction or demonstration (vs. myself who needs repetitive direct study to truly understand or master a new skill). She learns like her father, who can observe or participate actively in a new thing and just " gets it." [redacted] could do without toys most of the time if she has a bookshelf available, as reading and looking through books is her favorite pastime. She loves seeing familiar people (especially her family) and "playing with [her] friends" but is wary of strangers [redacted]

8) Tell us about your child, especially as a learner.
[redacted]

9) Do they currently attend school?
[redacted]

10) How can school help your child to prepare for their future?
[redacted]

11) What do you want your child to know/feel/learn as they move through their elementary years?
[redacted]

13) As we move forward with our Community Design Team for families to get involved in the co-creation of this school, what's the best for us to spread the word about that? Are you interested in joining these meetings? If so, what is your general availability/preference for a monthly meeting?
Emails work well for me because of the flexibility I may need to reply with thought-out responses. Meetings might be even better, allowing for back-and-forth conversations and idea building, though I can't guarantee every month attendance (expecting baby #2 in August! Gonna be a busy household!). I would love to be involved. My availability, generally, is Saturday mornings or most weeknights.

[redacted]

Courtney Murphy [redacted]

Sun, Mar 16, 9:28 PM

First- thank you so much for all the effort and care put into the responses to our discovery questions. This really paints a beautiful picture of the type of [redacted]nd the type of school you hope to provide for her. We hope to partner with families in creating that very space. [redacted]he choice of school is such an important one- and we appreciate you considering us [redacted]nd your families future.

We will use these answers to help discover trends from local families and include them in our application for our authorizers. I think the only follow up I have for now in the short term is- what do you think made our school stand out (if anything) over other options in the area that you could possibly enro[redacted] Looking forward to learning more. All very helpful information!

Courtney

[redacted]

Wed, Mar 19, 12:55 PM (13 days ago)

We haven't looked into preschools much yet, to be honest, but so far your school stands out because I have a great interest in the Montessori approach. The proximity to our home is important, as is tuition.

Courtney Murphy [redacted]

Wed, Mar 19, 7:41 PM (13 days ago)

Thank you for your reply. We appreciate the help!

R-05ac - Enrollment

a. Enrollment Plan

Our Montessori micro-school will open by enrolling Kindergarten and 1st grade students, providing families with a high-quality, tuition-free early childhood education option rooted in Montessori principles. Over five years, we will expand enrollment to include students in further grade bands (up to 6th grade). This phased growth will ensure a thoughtful and sustainable expansion while maintaining the core Montessori philosophy of multi-age classrooms, individualized learning, and hands-on exploration.

The Ballston Spa Central School District currently provides traditional elementary education options, but our school will offer an alternative: mixed age grouping. While our grade configuration may not fully mirror the district's structure at first, our expansion plan ensures increased alignment over time, with students flooding into our local middle school upon completion of our program. Additionally, given the strong community interest and demand for expanded early childhood education, our school will complement existing district offerings rather than compete, giving families greater choice while supporting the district's broader mission of serving all students.

Unlike district schools, which follow single-grade progression (K, 1st, 2nd, etc.), Montessori students remain in the same multi-age classroom for three years. This may shift enrollment numbers at district elementary schools, particularly in early grades if more families choose to start their children in Montessori Primary (3-6 years old) and remain in the program as it expands. However, this misalignment can also benefit the district by diversifying educational offerings and providing families with an alternative pathway that supports different learning styles. Our micro-school model ensures we add to the educational landscape without 'taking from,' that is- growing to the point that we become a detriment to the BSCSD budget. For students who eventually transition into district schools, their strong foundation in independence, collaboration, and problem-solving—hallmarks of Montessori education—may contribute positively to their new classroom environments. Collaboration between our Montessori micro-school and district educators can help smooth transitions and ensure students thrive in either setting, strengthening the overall educational landscape of the community.

Our Montessori micro-school will follow the same age eligibility requirements as the local district schools for any single-age groupings to ensure smooth transitions for students who may transfer between our school and the district. While our Montessori model emphasizes multi-age classrooms, we will align our minimum age requirements for enrollment in Pre-K, Kindergarten, and subsequent grade levels with the district's policies. This approach ensures that students remain on the same developmental and academic timeline, allowing for an easy transition should they move between educational settings.

Enrollment Summary

Wildflower Upstate New York will open in September 2026, serving students in grades kindergarten and first in a mixed age setting. We will open with 16 students, with plans to apply for pre-school options with BSCSD if approved for our charter. Our classes will eventually follow the authentic Montessori three-year cycle:

- Primary: Serving students ages 3,4,5 (3 year Pre-K, UPK 4, and Kindergarten age 5-6)
- Lower Elementary: Serving Grades 1, 2, and 3
- Upper Elementary: Serving Grades 4, 5, and 6

Wildflower Upstate New York Charter School will begin with an initial enrollment of 16 students in Year 1, with 8 students in kindergarten and 8 students in first grade in a single mixed age classroom. In Year 2, the school will expand to serve 24 students, continuing with 8 students each in kindergarten, first, and second grades. In year two we would shift our mixed age classroom design to be further in line with authentic Montessori grade bands- that is: have the kindergarten students in one classroom, and the first and second graders in another classroom. We hope to expand offerings to students ages 3 and 4, who would join the kindergarteners. By Year 3, enrollment will grow to 32 students, maintaining 8 students per grade across kindergarten through third grade. In Year 4, the school anticipates enrolling 43 students, with full enrollment of 8 students in each of grades K–4 and an initial cohort of 3 students in fifth grade. This would involve three classrooms (one for kindergarteners and future pre-schoolers, one classroom for 1st-3rd grade, and one for the students in 4th and 5th. By Year 5, Wildflower Upstate New York will serve a total of 59 students, with 16 students in kindergarten (we hope to open a second primary classroom by year 5) and 8 students in each of grades 1 through 5, along with 3 students in sixth grade. This narrative is represented in the table below:

Wildflower_Enrollment_Plan_Years_1-5

Year	Kindergarten	1st Grade	2nd Grade	3rd Grade	4th Grade	5th Grade	6th Grade	Total Students	Classroom Structure
Year 1	8	8	0	0	0	0	0	16	1 mixed-age classroom (K-1)
Year 2	8	8	8	0	0	0	0	24	2 classrooms: K, 1–2 (Montessori gradebands)
Year 3	8	8	8	8	0	0	0	32	2 classrooms: K, 1–3
Year 4	8	8	8	8	8	3	0	43	3 classrooms: K, 1–3, 4–5
Year 5	16	8	8	8	8	8	3	59	4 classrooms: 2 K (w/ preK), 1–3, 4–6

These enrollment projections are designed to ensure gradual, sustainable growth while maintaining the integrity of the Montessori model. With the additional age groups being added, we are mindful of the fact that our innovative model also means it may prove difficult to attract students who have already begun their schooling elsewhere (for example, when we open up to second graders in year 2, we would need to recruit students who may have done their pre-k-1st

grade years outside of a Montessori setting, and whose families may be hesitant to enroll them in a new school.) We hope our recruitment efforts can mitigate this, but it is why we kept some of our enrollment projections small across multiple years when we add grades. We hope that actual enrollment totals may also include a small cohort of three- and four-year-olds in the future, pending program expansion and community demand. If approved for our charter, we will apply for universal pre-k through the district and have already been in communication about this with our local board of education. As outlined in our Business Plan and Letters of Commitment, we are supported by Wildflower Schools, which is committed to equity in education and expanding access to Montessori learning. Our long-term vision includes growing the school responsibly, staying intentionally small in terms of class size, to serve more students while maintaining our high standards and strong outcomes.

Low Enrollment & High Teacher Leader Support

Wildflower Upstate NY intentionally maintains small class sizes and a high Teacher Leader-to-student ratio to ensure strong support for students and families. Recognizing that our Montessori model is unique in public education, we prioritize individualized instruction. A low student-to-staff ratio creates a supportive and manageable environment that contributes significantly to staff retention. When educators are responsible for fewer students, they are better able to build meaningful relationships, personalize instruction, and respond to the individual needs of each child—fostering a greater sense of impact and professional fulfillment. This structure also reduces stress and burnout, as teachers are not stretched thin across large class sizes. In a setting where their work feels purposeful and sustainable, educators are more likely to remain committed to the school community. When staff feel supported and see the tangible effects of their efforts on student growth, job satisfaction increases, leading to higher retention and a more stable, collaborative team culture. With the addition of an executive director assisting in management of administrative tasks, we seek to create a supportive environment and sustainable work load for our future Teacher Leaders.

Grade Alignment with Local Schools

Our grade bands align with elementary schools in BSCSD, where each of our 4 elementary schools typically serve k-5. This ensures that our 5th or 6th-grade students (or 11-12 year olds in our upper elementary program) can seamlessly transition to Ballston Spa Middle School. Our middle school, the only one in this district, serves students in grades 6-8th. We will partner with our local district schools to ensure a smooth transition from our program to the middle school. We describe our proposed engagement and partnerships with the local district schools later in this RFP located in: R-15 - District Relations. In partnering with our local schools, we hope to promote unity and add to the educational landscape so that our students may seamlessly enter the Middle School once of age to do so.

To simplify the enrollment process for families, we will adopt a Kindergarten cut-off date of December 1, which aligns with BSCSD's current protocol: that children must be 5 years old on

or before December 1st of the school year in which they are enrolling for our “kindergarten” program (keeping in mind Montessori gradebands serve mixed age classroom settings, so they would be enrolling in our ‘primary classroom’).

Strategic Growth Model

Some reports show that slow-growth charter schools achieve higher academic outcomes over time and put less strain on the home district in which the charters were formed. The economic policy institute has reported that rapid charter school expansion can drain resources from traditional public schools, and that this fiscal stress can undermine the quality of education for the majority of students who remain in district-run schools.[30]

By expanding gradually, Wildflower Upstate NY can:

- Develop strong academic and operational foundations
- Recruit and train Teacher Leaders aligned with our authentic Montessori model
- Ensure high-quality implementation of Montessori principles
- Ensure our inclusive model is lived through our actions of ensuring all students, and especially students with disabilities, are showing growth over time

This phased approach allows us to refine our systems, support our staff, and deliver an exceptional learning experience to students.

Student Enrollment & Attrition Management

As a public charter school, we will continuously enroll new students as seats become available. Based on trends in similar schools, we anticipate a 5-7% annual attrition rate, which equates to about one new student per grade each year. We recognize that new students may arrive with varied academic and behavioral needs, and our small class sizes and data-driven instruction will ensure that every child receives personalized support. We will have open enrollment and back fill students as needed to provide access to families who are interested in joining even if past the natural start of the year. By utilizing open enrollment, we ensure we are providing an inclusive model that welcomes all students, including those who may have participated in other local programs and families have found they are not the right fit.

Future Growth

At charter renewal, if we have demonstrated strong academic results and community demand, we will continue to expand through years 6 and 7 by maintaining a second site in a neighboring town within our district (for example, opening a second lower elementary, and a second upper elementary). We will assess whether or not this is something surrounding local communities want/need and remain committed to the vision of Wildflower Schools being

[30] Lubienski, C., & Malin, J. (2016). *The impact of charter school growth on the fiscal health of traditional public school districts: Evidence from U.S. cities*. Economic Policy Institute. https://www.epi.org/publication/exploring-the-consequences-of-charter-school-expansion-in-u-s-cities/

micro-schools with little impact financially on local districts. Further demonstration of this projected growth can be located in R-11ab - School Management and Leadership, where we have developed organization charts for years 1-7 to show this slow growth process. Future discussions of growth will occur as we approach year 5 of our charter and keep SUNY CSI aware of any plans for growth.

To ensure high-quality instruction and a supportive learning environment, Wildflower Upstate New York Charter School proposes an initial class size of eight students per grade level, consistent with the Montessori model and our co-taught classroom structure. In Year 1, we plan to enroll 16 students—eight in kindergarten and eight in first grade—in accordance with SUNY's requirement to open with a minimum of two grade levels. However, recognizing the possibility of evolving community interest and enrollment demand, we respectfully request the flexibility to enroll students from one additional grade level earlier than originally proposed. For example, this could involve including second grade students in Year 1 instead of waiting until Year 2, provided sufficient staffing and classroom space are available. This would not alter our overall enrollment numbers; rather, it would adjust the composition of enrolled students to meet demonstrated community need. Any such adjustment would be made with thoughtful consideration and ongoing fidelity to our educational model and small school design. We will remain in open communication with SUNY CSI to determine whether such a shift would require a material revision request.

We will closely monitor the impact of any enrollment adjustments on student outcomes, family satisfaction, and staff capacity. Should additional structural changes be warranted, we are committed to engaging in transparent dialogue with SUNY CSI and adhering to all required protocols to ensure alignment with our charter and accountability standards.

b. Target Population Enrollment

Enrollment Equity Narrative

WUNYCS is committed to building an inclusive, equitable learning environment that reflects the diversity of our community and the larger world we live in. Currently, the Montessori landscape in Upstate New York consists of private schools that are tuition based. Even with the use of sliding scale tuition in some locations, many of these programs are financially inaccessible to certain demographics of people. We hope to change this by bringing Montessori to the public sector.

As determined by SUNY CSI's enrollment and retention calculator, the prospective enrollment in year 5 of 59 children yields the following enrollment and retention targets:

- 30.6% Economically Disadvantaged (18 students total)
- 1% ELL- (0.6 students total)
- 15.4% Students With Disabilities - (9.1 students total)

To ensure meaningful access for historically underserved students, we will implement a weighted lottery for:

- Students whose families are economically disadvantaged (ED)
- Students with disabilities (SWDs)

Given our current outreach efforts, community engagement strategy, and demonstrated demand, WUNYCS does not anticipate receiving too few applicants from our designated groups. This projection is supported by demographic data from the Ballston Spa Central School District (BSCSD), which shows a significant percentage of students who are eligible for free or reduced-price lunch (FRL) and students with disabilities (SWDs)—the same populations we prioritize through our weighted lottery system. This strategy also supports our broader mission of cultivating diverse classrooms where every child is valued and prepared to thrive in a community of varied backgrounds and abilities.

Assessing Effectiveness

We will regularly assess the effectiveness of our lottery model to ensure alignment with our equity goals and legal requirements. To ensure our policy remains effective and aligned with our equity goals and legal obligations, WUNYCS will conduct an annual review of enrollment and application data. This includes comparing the percentage of enrolled students from educationally disadvantaged groups to the demographics of the Ballston Spa Central School District. We will utilize SUNY CSI's calculator to determine if we are meeting our targets year by year. We will also monitor demand to ensure that our outreach efforts are successfully reaching and encouraging applications from these prioritized populations.

In addition, we will analyze lottery outcomes to assess how many applicants from educationally disadvantaged groups were admitted through the weighted lottery model. This data will help us determine whether our lotteries are functioning as intended and inform any needed adjustments to our recruitment or enrollment strategies to strengthen equitable access.

Recruiting Families With Students With Disabilities

Our entire school mission and vision were largely influenced by the lead applicant, Courtney Murphy's, experience as a special education teacher and now parent of a child with a disability. Recruitment efforts are significantly strengthened when parents of students with disabilities come together. This shared experience creates a strong foundation of trust and empathy, making outreach more authentic and relatable. Parents who have lived through the challenges of securing appropriate educational support for their children are able to connect with other families in similar situations. They can speak directly to the specific needs, advocacy efforts, and potential solutions that the school aims to offer. These conversations with families have already begun during our interest form collection. Courtney will rely on her knowledge of special education and inclusion, coupled with the lived experience of having a child with a disability, to support families in their school choice. She will act as the lead point person in family phone calls when a family has questions or concerns about their child with an IEP

potentially joining our program. Additionally, we will partner with local organizations with specific ties to advocacy in regards to students with disabilities and their support systems (Office of Family Services, early childhood special education services, AIM services, Saratoga Bridges, and more) in order to forge community partnerships and spread the word about our school.

The inclusion of these parents in the recruitment process demonstrates a genuine commitment to inclusive education and ensures that the perspectives of families with children who have disabilities are heard and prioritized. This collaboration fosters a sense of community and shared purpose, motivating other parents to join in the effort. When the founder, who has personal experience navigating the challenges of raising a child with a disability, leads the charge, it adds an additional layer of credibility and reassurance to prospective families. These efforts show that the school is not just a theoretical idea but one rooted in real-life experiences, making the vision of a school that truly supports all learners more tangible and compelling. Courtney is an advocate for both school choice as well as inclusion, and plans to share her personal story of her daughter in her recruitment efforts. These efforts have already begun, as evidenced by Courtney's discussions with local families and our informational slide deck including images of Courtney's daughter to further empathize with families' unique wants and needs for their children.

Recruiting parents of students with special needs without directly asking requires strategic outreach, inclusive messaging, and relationship-building. The goal is to create an environment where families feel welcome and naturally drawn to our school's mission and services. Emphasizing special education supports and individualized learning in all public-facing materials, such as our presentations, flyers, and social media, has helped us express that our school is designed to serve all learners. Citing research that Montessori students with disabilities can thrive in the inclusive, student-centered environment has helped us to build trust and credibility. In the future we plan to partner with local organizations, such as early intervention programs, therapy centers, and advocacy groups, which will also help spread awareness. We plan to host free monthly informational sessions either on zoom or in person on topics like early childhood development or sensory-friendly learning, with concrete materials for families to engage without pressure. Open houses and community events that highlight inclusive education practices allow parents to experience the school's approach firsthand, and we hope to partner with them so they feel their voices are heard throughout the entire process, influencing our programming so families feel the sense of belonging in our vision.

So far during our social media outreach, families are more willing to engage in personalized conversations about their own experiences. Encouraging them to share their experiences organically helps build a supportive network. We currently have a parent in the district serving on our board, and in the future hope to have a family advisory board that meets regularly to continue these personal conversations on their children's unique needs and experiences. The Montessori approach naturally aligns with diverse learning needs, emphasizing self-paced learning and hands-on materials, making it an attractive option for families seeking an alternative to traditional education. By positioning our school as a welcoming, supportive,

and student-centered environment, families of children with special needs have begun to, and we hope will continue to, seek out our school.

Families with Students Eligible for Free/Reduced Lunch

Another key portion of our target demographic includes the 33% of students who receive free or reduced lunch in our district (a number that climbs to 49% [31]in our title 1 elementary school Wood Road), reflecting the economic diversity within our community. These families, like all others, deserve access to high-quality, innovative educational options that support their children's unique learning needs. Our tuition-free model has naturally drawn increased interest from many families, particularly those who have expressed concerns over the cost of local private Montessori programs and are actively seeking a more accessible alternative.

To effectively reach families of low socioeconomic status—particularly the 33% of students in our district who qualify for free or reduced-price lunch, and the 49% at our local Title I school, Wood Road Elementary—we will implement a multi-pronged, community-centered outreach strategy. Recognizing that these families often face barriers related to time, access, and affordability, we will partner with local service providers such as food banks, housing organizations, and Title I coordinators to share information about our tuition-free Montessori model in trusted community spaces. Outreach materials will be multilingual, visually accessible, and available in both physical and digital formats, with QR codes linking directly to our interest form. Additionally, we will host neighborhood-based information sessions at flexible times, including evenings and weekends, as well as offer home visits and/or digital options (Zoom, Google meet) for families that may not be able to attend events in person. Our team will establish pop-up booths at places such as local laundromats, grocery stores, and community centers, and deliver Montessori learning kits to families in high-need areas as a tangible introduction to our educational approach. We will also cultivate a network of families who have already engaged with us to help extend word-of-mouth referrals within their own communities. By embedding our school in the fabric of everyday community life, we aim to reduce barriers, build trust, and ensure that families from all economic backgrounds feel welcomed, respected, and empowered to choose a high-quality, inclusive educational experience for their children.

By creating an environment that fosters inclusivity, independence, and individualized instruction, we aim to provide opportunities that empower all students, regardless of their disabilities or socio-economic background. Families who may have felt financially limited in their choices now have an option that aligns with their values and priorities for their child's education. Ensuring that our school remains accessible to a broad range of families is central to our mission, reinforcing the belief that every child should have the opportunity to thrive in a setting that nurtures their potential, regardless of their disability or the income level of their family.

[31] New York State Education Department. (2024). *Enrollment data for Wood Road Elementary School (2023–24)*. NYSED Data Site. https://data.nysed.gov/enrollment.php?year=2024&instid=800000038584

Removing Barriers during Engagement

We will implement the following strategies to recruit future students, with a specific focus on reaching a diverse range of families, including those with children who have disabilities:

- **Engage with Community Events**: Attend local community events, especially those provided by Early Intervention/Committee of Special Education to directly connect with local families and share information about our school, highlighting our commitment to inclusivity and support for students with disabilities.
- **Be Present in the Community**: Research and attend local community events throughout the spring and summer to ensure our presence in spaces where potential families gather, allowing us to introduce our school as an accessible and welcoming option for all.
- **Outreach to Local Businesses**: Introduce ourselves to shops, restaurants, and businesses in the area where families may frequently visit, creating opportunities to spread the word about our school to diverse groups within the community.
- **Utilize Printed Materials**: Continue to use flyers in key locations such as community boards, and our local libraries, to inform the community about our school, ensuring our materials are accessible to families from all backgrounds and providing information about the services we offer, especially for students with disabilities. We will translate our documents into other languages spoken in the area (French, Spanish). We will provide translated copies of materials for any families that indicate their home language is a language other than English.
- **Leverage Social Media**: Continue to create social media content that promotes the school, sharing stories about our inclusive approach and how we cater to families with students of varying needs, including those requiring special education services. Utilize social media to receive feedback on days, times, and manner in which families would be able to attend our future events. Provide zoom sessions of any informational sessions whether in person or virtually based to be posted to social media at later times, keeping all interested families involved and aware.
- **Collaborate with Community Organizations**: Build relationships with organizations that are already providing direct services to families, particularly those focused on supporting children with disabilities. We will reach out to local service providers that work with BSCSD to proactively form relationships and determine if they know of families seeking innovative learning opportunities. This strengthens our connection to families in need of inclusive education options.
- **Empower Founding Families**: Facilitate opportunities for founding families to become part of our school design team as well as volunteer and table with us at local events, helping us reach others through personal connections and shared experiences.
- **Partner with fellow Montessorians:** We also draw on our networks within the Montessori community- to ensure that families who may benefit most from our inclusive approach are informed and engaged. We will continue to welcome and seek feedback from schools such as Riverrun Montessori and Little Ones Montessori in Schenectady, New York. Teachers in these spaces are open to supporting our future vision and have already provided feedback on our programming. We will collaborate to ensure we are

utilizing strategies that create a welcoming sense of belonging in our future classrooms.

Through these strategies, we aim to recruit a diverse group of families, particularly those seeking a supportive, inclusive, and accessible educational environment for their children.

Admissions

In our outreach efforts, we will prioritize students with disabilities by actively engaging our outreach efforts, we will prioritize students with disabilities by actively engaging with families and community organizations that support them, ensuring these groups and parents of students with disabilities are aware of the opportunities our school offers. In alignment with SUNY's guidelines, we plan to use a weighted lottery for students with disabilities and those from low-income backgrounds.

Our approach will include working closely with local support groups (for example, included but not limited to: Capital District ASD/Special Needs Moms on Facebook), as well as our social media and email outreach to ensure that families of students with disabilities are well-informed and supported in the enrollment process. Additionally, our school will prioritize these groups in the lottery process, ensuring fairness while aiming to provide equitable access to our personalized, inclusive educational model. This prioritization strategy of targeted outreach, will increase the likelihood of enrolling students who may benefit most from our school's resources and teaching philosophy, all while maintaining compliance with legal and regulatory requirements. Further specifics around our use of a weighted lottery and preferences are found in R-05d - Admissions Policy.

Retention Efforts

When students and families feel a sense of belonging in their school community, attendance rates are consistently higher. At Wildflower Upstate New York Charter School, we believe that strong relationships, inclusive practices, and a nurturing learning environment contribute directly to daily student engagement. As a reflection of this commitment, we aim to maintain a 95% average daily attendance rate as a key data point representing both family satisfaction and student retention. This goal is reflected in the R-06g Draft Accountability Plan of this RFP. High attendance will serve as one of our indicators of school climate and long-term community investment in our model. To ensure retention, particularly for students with disabilities and underserved groups, the school will implement the following strategies:

- **Personalized Support Plans**: Tailored plans for each student, developed with families and educators, to address individual needs and provide targeted academic support and accommodations as required by IEPs. These personalized support plans would help all students, including those with disabilities. However, they may differ from the students IEP in that they may reflect personal goals from the families or students that do not quite fit within the typical framework of an IEP.

  For example, a goal in a Montessori PSP might focus on fostering self-regulation and

problem-solving skills. A goal like "Developing the ability to plan, initiate, and complete tasks independently" could be set for a student who may not have a disability but needs support in these areas due to observed developmental delays. This goal might not fit within the more structured IEP framework because it is not specifically related to a disability but focuses on helping the child develop essential life skills. In Montessori, the emphasis is on the child's holistic development, so the PSP would consider the child's unique strengths and challenges, allowing for flexibility in how they reach their goals without the constraints of traditional educational models.

- **Inclusive Teaching**: Our model of one Montessori certified teacher and one teacher's assistant ensures all students receive the support they need in a co-taught, co-lead classroom.
- **Special Education Supports:** Our staff is committed to providing inclusive, individualized support to ensure that all students with disabilities receive the services outlined in their Individualized Education Programs (IEPs) within the classroom environment. Following the Montessori model of inclusion, special education services will be integrated seamlessly into the learning environment, allowing students to receive- for example- speech, physical therapy, specialized instruction, and other specialized therapies within their classroom setting.
- **Family and Community Engagement**: We plan to have regular communication with families through conferences, IEP goal tracking meetings, and school events, plus outreach efforts to keep families involved. We will also seek feedback from families on their students' experiences.
- **Mentorship in a mixed-age classroom**: In a mixed-age setting, there is no "end" to the learning cycle as children progress; rather, they continue to learn through observation, collaboration, and ongoing challenges. Older students are not limited by grade-level expectations and can continue their learning journey as they mentor younger students. Children in mixed-age classrooms interact with a diverse group of peers, which enhances their social skills. They learn how to communicate with, collaborate with, and support children of different ages, improving their ability to navigate social situations and develop empathy. We hope to foster a sense of belonging for our students through this mixed-age classroom setting.
- **Continuous Monitoring**: Ongoing assessments and data tracking, to identify performance patterns and adjust resources as needed. Teachers will utilize technology to keep track of students' performance aligned to personalized support plans.
- **Ongoing Professional Development**: Ongoing training for staff on best practices for inclusive education, cultural responsiveness, and social-emotional support. Montessori classrooms are known for their mixed-age groups, where students progress at their own pace. Frequent professional development ensures teachers are skilled in differentiating instruction, adapting lessons to individual learning styles, and providing tailored support for each student. When parents and students feel supported in their unique learning journeys, they are more likely to stay engaged and remain in the school.

  These strategies will ensure that all students, particularly those from underserved

groups, receive the support needed to succeed and remain enrolled. We will monitor their effectiveness through data and feedback to make necessary adjustments.

To monitor the efficacy of these efforts, we will disaggregate student performance data by subgroup (ELL's, SWD's, economically disadvantaged students, and any other identified groups). This data will be analyzed regularly through a combination of formative assessments, teacher observations, and student progress portfolios to identify achievement trends and gaps. Teacher leaders and support staff will use this data to adjust instructional strategies, provide targeted interventions, which will in turn improve retention. Through these intentional structures, we will create a supportive, inclusive learning environment where all students can thrive in a public Montessori setting.

c. Student Enrollment Table

CHARTER ENROLLMENT BY GRADE							
GRADES	LEVEL	2026-27	2027-28	2028-29	2029-30	2030-31	AGE RANGE
Kindergarten	Elementary School	8	8	8	8	16	5-6
1st Grade	Elementary School	8	8	8	8	8	6-7
2nd Grade	Elementary School		8	8	8	8	7-8
3rd Grade	Elementary School			8	8	8	8-9
4th Grade	Elementary School				8	8	9-10
5th Grade	*Elementary School*				3	8	10-11
6th Grade	Middle School					3	11-12
7th Grade	Middle School						
8th Grade	Middle School						
9th Grade	High School						
10th Grade	High School						
11th Grade	High School						
12th Grade	High School						
Ungraded							
TOTAL		16	24	32	43	59	

We would like to acknowledge that there is a slight discrepancy between the figures submitted in our Intent to Apply form and those reflected in our final transmittal/summary regarding enrollment numbers. These differences are the result of a strategic shift in our enrollment planning, specifically our decision to allow up to 8 students per age group/grade level, rather than the previously planned 7. This minor adjustment allows us to provide further access to our program, while maintaining a small class size and high teacher to student ratio.

R-05d - Admissions Policy

General Admissions Process

WUNYCS will be open to all eligible students and will not discriminate based on race, ethnicity, national origin, gender, disability, or any other protected characteristic. Admissions will be conducted through a random, public lottery process if the number of applicants exceeds available seats. The school is committed to equitable access and will ensure outreach efforts effectively reach families of students with disabilities (SWDs) and other at-risk populations, such as those who are economically disadvantaged.

Lottery Logistics

We anticipate that a tuition-free Montessori model, which has yet to exist in Upstate New York, will generate significant interest among families seeking alternative, high-quality educational options. Given this expected demand, it is likely that Wildflower New York will need to conduct a lottery to allocate available seats in a fair and transparent manner. If the number of applications exceeds the available seats, WUNYCS will implement a fair and transparent lottery process in compliance with NYSED regulations. The lottery will be publicly announced, with notifications sent to local media at least one week in advance, and notices posted in accessible public locations at least 72 hours before the event. Additionally, information will be shared on the school's website at the same time as the media announcement. The lottery will take place in an open, accessible location that can accommodate attendees. Attendance is not required for families, and participation does not influence the selection process.

At-Risk Designations

To promote inclusivity and diversity, the school will prioritize historically underserved populations, including:

- Through our social media engagement we hope to partner with families of students with disabilities. In addition, by collaborating with Saratoga County Department of Social Services (DSS), which is located in Ballston Spa, we will connect with families of students with disabilities as well as economically disadvantaged families. DSS ensures students with disabilities receive early intervention services, so they will likely know of students about to enter 3k programming once they finish early intervention, as well as be aware of students finishing pre-k and ready to enroll in kindergarten. They also provide services to families who are economically disadvantaged, and may better help us spread the message of our specific model of inclusion.
- Students with Disabilities (SWDs) – The school will actively recruit SWDs by partnering with early intervention programs, special education advocacy groups, and local service providers. We will continue outreach in local parent social media groups as well.
- English Language Learners (ELLs) – Targeted outreach will ensure ELL families are aware of application processes and support services. They will receive materials in their first language. Our population in BSCSD is small (0-2% over the last five years) but we will be

proactive in ensuring our school is an inclusive space by welcoming and encouraging families of students who are English Language Learners to apply and will make considerations for all needed translation services.

- Economically Disadvantaged Students – The school will engage with community-based organizations to connect with low-income families. DSS works to connect low-income families with tuition-free preschool and financial aid for childcare. We will ensure families working with DSS are aware of our school during their search for educational choices. We will continue outreach in local parent social media groups as well.

  As referenced in R-05ac - Enrollment, we will utilize a weighted lottery for:

- Students from low-income families (eligible for free or reduced-price lunch)
- Students with disabilities (SWDs), as defined by IDEA

Statutory Preferences

In accordance with the New York Charter Schools Act, the school will apply the following statutory admissions preferences:

1. If our charter is approved, we intend to establish a separate pre-kindergarten program for three- and four-year-old students. We understand that these students may not receive lottery preference and will be required to apply through the general K–6 lottery process, consistent with all other applicants. Based on our outreach and community partnership initiatives, we anticipate that a portion of our pre-kindergarten applicants will be students with disabilities (SWDs) or students who are economically disadvantaged, which may qualify them for participation in applicable weighted lottery categories. However, in the absence of such qualifications, these students will not be granted any preference or added weight and must enter the general lottery pool should there be additional demand.
2. Returning Students – Enrolled students will be guaranteed continued placement in subsequent years.
3. Siblings of Enrolled Students – Siblings of current students will receive priority admission to support family continuity. A sibling is defined as a child who shares at least one parent and resides in the same household. Parents are considered those with primary custody (at least 50% of the time). Siblings of currently enrolled students receive priority in the lottery. If siblings apply together for open seats, they will be assigned a single lottery number for their household. If one child is selected, their sibling will also be offered a seat, provided space is available in the appropriate grade level. Sibling applicants will be offered a seat before general lottery applicants, subject to available capacity in the appropriate grade level.
4. Students Residing in Ballston Spa Central School District– The school will give preference to students residing within the district to strengthen community ties.
5. Children of School Employees & CMO Employees (Up to 15% each year) – Consistent with state law, Wildflower Upstate NY will reserve 15% of available seats each year for children of full-time employees of the school or its charter management organization

(CMO). By reserving a percentage of seats for staff members' children, we aim to support retention amongst staff and foster a strong school community. This approach enhances work-life balance, investment, and long-term commitment, creating a more stable and dedicated team. Too often, charter schools are plagued by high staff turnover, and we hope to mitigate this by offering seats to staff members' children (up to 15%).

Grades Served & Backfilling Policy

- WUNYCS will admit students in kindergarten and first grade during its initial enrollment period, and will apply for PreK3 and UPK 4 if our charter is approved.
- WUNYCS will backfill vacancies in order to ensure continued access for students who are on local wait lists elsewhere and have entered our lottery, living our vision of accessibility.
- WUNYCS will continue accepting students until December 31, after which it will not enroll new students for the current academic year to maintain instructional consistency and support services, particularly for SWDs who may require specialized transition planning.

Commitment to Students with Disabilities

WUNYCS will ensure families of SWDs receive the supports they need throughout the admissions and enrollment process by:

- Providing accessible application materials (in multiple languages and formats).
- Conducting family meetings in person to ensure all paperwork is properly filled out, helping families through the process of enrollment.
- Conducting outreach through disability advocacy organizations and local special education networks.
- Host private meetings with teacher leaders and family members with their child to explore the prepared environment, ask questions, and learn more about each other- ensuring students feel a sense of belonging long before the first day of school.
- Ensuring timely evaluations as needed and implementation of IEPs for newly enrolled students.
- Maintaining appropriate special education staffing (remaining in compliance) to accommodate incoming SWDs, including backfilled students.

By implementing these policies, the school aims to provide an inclusive and equitable admissions process that prioritizes access for all students, particularly those with disabilities and other at-risk designations.

R-06af - Curriculum and Instruction

a. Curriculum Selection Process

Introduction:

Developed by Dr. Maria Montessori, the Montessori Method is grounded in scientific observation of children's learning processes. The approach fosters independence, social responsibility, and intellectual curiosity through structured yet self-directed learning environments. Montessori classrooms include multi-age groupings where students learn from one another, and lessons are tailored to sensitive developmental periods to optimize learning. The prepared environment includes hands-on, self-correcting materials that promote deeper conceptual understanding. The Montessori Method is in perfect alignment with our mission and vision for our future students because of its evidence-based outcomes; holistic, child-centered approach; and underlying philosophy focused on serving all children.

Maria Montessori developed her method over 100 years ago through observations and research in schools serving high-poverty communities and children with special needs. Today there are more than 5,000 Montessori schools in the United States, and over 22,000 worldwide. Driven by her curiosity and commitment to equity, Dr. Montessori applied her medical training to education, uncovering universal truths about child development. At WUNYCS, we are unapologetically creating an inclusive learning environment where all students receive the resources and support they need to thrive. Our Teacher Leaders will partner with families to co-design classes with a focus on inclusion and belonging-ensuring every child is valued and empowered in their learning journey.

Research based effectiveness:

Extensive research demonstrates that when implemented with integrity, the Montessori Method is one of the few educational approaches that provides long-term academic and social benefits for all children. A 2003 meta-analysis of 29 school models ranked Montessori among the top five for positive student outcomes.[32] Research has also shown that Montessori benefits children from low-income communities and under-represented backgrounds in terms of academic achievement, executive function, creativity, social skills, work habits, attendance, and behavior. Students in Montessori schools outperform students in traditional schools on measures of literacy and numeracy as well. A recent evaluation of public Montessori programs in South Carolina, over a five-year period, found higher levels of growth in Montessori classrooms compared to traditional classrooms. The findings were consistent even when the data were disaggregated by income, race, gender, and other variables.[33]

[32]Borman, G. D., Hewes, G. M., Overman, L. T., & Brown, S. (2003). Comprehensive school reform and achievement: A meta-analysis. Review of educational research, 73(2), 125-230.

[33] Roots in Research: The Ideas and Evidence Behind Wildflower Schools. (2019, January 11). Wildflower Schools. https://wildflowerschools.org/roots-in-research.)

Maria Montessori viewed child development as holistic, with cognitive growth deeply connected to physical development. In Montessori classrooms, movement is integral—students can sit where they choose, work on the floor, and engage in hands-on activities that develop fine and gross motor skills. Young children trace physical sandpaper letters to learn the alphabet, while Practical Life activities like table washing incorporate purposeful movement. Unlike traditional schools, where recess is a separate break, Montessori classrooms naturally integrate movement into daily learning. Abundant research shows that movement and cognition are closely intertwined. 'People represent spaces and objects more accurately, make judgements faster…, remember information better, and show superior social cognition when their movements are aligned with what they are thinking or learning.[34]

Other research findings regarding the efficacy of the Montessori Method include the following:

1. A recent study of public Montessori schools in South Carolina revealed considerable evidence of a Montessori advantage on mitigating education inequalities using an authentic Montessori method.
2. A study conducted in Hartford, Connecticut, showed significantly higher ELA standardized test scores for children in Montessori classrooms than those in non-Montessori classrooms across all three years of the analysis and controlling for student demographics and previous test scores.
3. The Hartford study also showed a significant Montessori advantage in math and social studies in two of the three years.
4. Montessori students in both Hartford and South Carolina showed higher levels of executive functioning, were more persistent in the face of challenges, and reported liking school at higher rates.[35]
5. Low-income students in Hartford who spent three years in high-fidelity Montessori schools significantly closed the achievement gap with higher-income students.[36]
6. A longitudinal study of students in Milwaukee also associated Montessori with a significant and lasting impact in the areas of math and science performance long after preschool and elementary school.[37]

Research consistently shows that Montessori education benefits all students and is especially effective for diverse communities. At Wildflower schools, a child-centered philosophy means that each child is treated as an individual with a unique developmental pace and direction. This approach particularly aligns with our vision of an inclusive classroom setting. However, there are currently no economically viable public Montessori options in Ballston Spa—or across upstate New York. WUNYCS seeks to change this by expanding access to

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[34] Lillard, A. S. (2017). *Montessori: The science behind the genius* (3rd ed.). Oxford University Press.

[35] Culclasure, B., Fleming, D. J., Riga, G., & Sprogis, A. (2018). *An evaluation of Montessori education in South Carolina's public schools*. Riley Institute at Furman University.

[36] Lillard, A. S., Heise, M. J., Richey, E. M., Tong, X., Hart, A., & Bray, P. M. (2017). *Montessori preschool elevates and equalizes child outcomes: A longitudinal study.* Frontiers in Psychology, 8, 1783. https://doi.org/10.3389/fpsyg.2017.01783

[37] Dohrmann, K. R. (2003). Outcomes for students in a Montessori program. Rochester, NY: Association Montessori Internationale/USA.)

high-quality Montessori education for all families by providing a tuition-free public charter micro-school.

WUNYCS student learning objectives, rooted in Montessori's whole-child approach, focus on both academic progress and social-emotional development. Montessori recognizes that all children are naturally curious, peaceful, and intrinsically motivated to learn. In this model, Teacher Leaders serve as guides, supporting both their own growth and that of their students through a proven curriculum. Learning objectives, content, and skills are carefully structured to ensure alignment across grade levels and subject areas, following Montessori principles.

New York State Standards Alignment:

The Association Montessori International USA (AMI/USA) demonstrated the alignment of this curriculum with Common Core State Standards (CCSS) in 2014. Alignment documents have undergone extensive review, including evaluations by senior elementary trainers and AMI's Scientific Pedagogy Group. The full scope and sequence of the Montessori curriculum, as well as its alignment with New York State Standards and the Common Core are commercially available and will be made available to our Teacher Leaders. Our teacher leaders will utilize the curriculum maps to prepare our Kindergarten through upper elementary students to meet and exceed standards. Teacher Leaders will know what to teach and when to teach it by utilizing the scope and sequence, using these resources to guide instruction, and the school will provide all necessary Montessori materials[38]. Teacher leaders will work with the Executive director to select the appropriate resources that align with their curriculums in their classrooms. For example, in addition to the authentic Montessori curriculum, Teacher Leaders will use culturally responsive materials in their curriculum (for example, through their selection of Peace Keepers, mentioned in a later section of this narrative). By centering students' lived experiences we create a sense of belonging in our school and blur the lines between home and the classroom.

Wildflower schools embrace innovation while staying true to authentic Montessori principles. Our Teacher Leaders leverage modern technologies to enhance observation and documentation, supporting continuous improvement without compromising hands-on learning. By exploring new ideas, evaluating outcomes, and collaborating with peers, we ensure our approach remains dynamic and effective, keeping Dr. Montessori's vision of scientific pedagogy alive. As such, our Teacher Leaders will use Transparent Classroom, the leading Montessori record-keeping system, which maps the entire Montessori elementary curriculum in alignment with CCSS, Next Generation Science Standards, and College, Career, and Civic Life (C3) Framework for Social Studies Standards. Transparent Classroom is a digital record-keeping and classroom management tool designed specifically for Montessori educators. It helps teachers

[38] National Center for Montessori in the Public Sector. (n.d.). *The Montessori Curriculum to Standards Alignment (MCSA)*. Retrieved March 31, 2025, from https://www.public-montessori.org/the-montessori-curriculum-to-standards-alignment-mcsa/

track student progress, document learning experiences, and align lessons with Montessori standards.

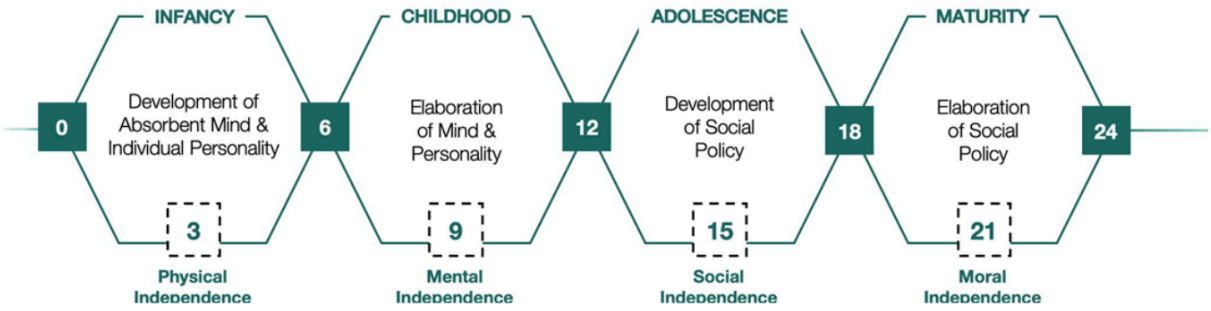
Further Evidence of Montessori and NYSCCS Alignment:

Montessori Approach	New York State Common Core Standards Alignment
Teachers trained in the Montessori method provide individualized guidance based on student readiness and interests.	Demonstrate Independence – Learners develop autonomy in learning through self-directed activities and decision-making.
Multi-age classrooms encourage peer mentorship, leadership, and cooperative learning.	Respond to varying demands of audience, task, purpose, and discipline – Adaptive communication skills are developed through collaborative learning, peer mediation, and multi-age interactions.
Uninterrupted “work cycles” (three-hour morning and afternoon sessions) allow deep engagement with learning materials.	Build strong content knowledge – Extended periods of concentration support mastery of mathematics, language, science, culture, the arts, and practical life skills.
Child-directed learning fosters intrinsic motivation and curiosity, with teachers acting as guides.	Value Evidence – Learning is structured to support evidence-based reasoning, critical thinking, and exploration within structured parameters.
Hands-on, self-correcting materials support conceptual understanding and problem-solving.	Ability to Comprehend as well as Critique – Learning focuses on developing analytical skills by engaging with concrete materials before moving to abstract concepts.
Montessori fosters global understanding and international peace by exposing children to different cultures and their unique ways of living	Come to Understand Other Perspectives and Cultures – Cultural awareness, social-emotional development, and exposure to diverse perspectives are integrated into learning experiences.
Early exposure to research tools and practical problem-solving develop digital literacy and critical thinking.	Use Technology and Digital Media Strategically – Learners engage with research tools, digital media, and technology-enhanced problem-solving strategies.
Self-correction and self-assessment encourage reflection and ownership of learning.	Demonstrate Metacognition & Critical Thinking – Students are guided in self-reflection, peer feedback, and independent evaluation of work.

Montessori Planes of Development:

The Planes of Development divide children's growth into four six-year cycles, ranging from birth to 24 years of age, which are divided into halves to create eight three-year stages. For WUNYCS's application, the three relevant 3-year stages that reflect traditional Montessori student organization between three and 11 years of age are:

- PK-K (ages 3-6): The "Primary Program"
- Grades 1-3 (ages 6-9): The "Lower Elementary Program"
- Grades 4-6 (ages 9-12): The "Upper Elementary Program"



<u>The Primary Program (PreK-Kindergarten: Ages 3-6)</u>

The Primary Program integrates the following areas of learning:

- Language (oral language, writing, reading)
- Mathematics
- Practical Life
- Sensorial
- Cultural Studies (includes science and social studies)

Children in the primary years are natural explorers who engage with hands-on materials to grasp new concepts. At ages 3-6, they are in the "absorbent mind" stage, eager to understand their surroundings, develop independence, and learn through observation and practice. Learning standards in primary classrooms will align with their sensitivity to language, order, and movement while also assessing social-emotional and cognitive development. To support this,

we will implement the following curriculum, designed to meet these developmental needs and learning standards.[39]

Content Area	**Selected Standards**
Language/Literacy	Montessori Language Curriculum and NYS CCSS for ELA
Mathematics	Montessori Mathematics Curriculum and NYS CCSS for Math
Social-Emotional	Montessori Practical Life, Sensorial, Aesthetic, and Personal Development Curriculum Montessori Peace Keepers curriculum and Mindup
English Language Learning	Identification: New York State Identification Test for English Language Learners (NYSITELL) Assessment: New York State English as a Second Language Achievement Test (NYSESLAT) If necessary depending on enrollment: Lexia or Raz Plus are curriculums we may utilize for ELL students

The Elementary Program
(Lower Elementary: 1st - 3rd: ages 6-9, Upper Elementary: 4th - 6th: ages 9-12)

The curriculum for the Elementary Program includes materials and activities in the following subject areas:

- Language arts (including phonics, spelling, grammar, sentence analysis, foreign language, creative and expository writing, and literature)
- Mathematics (arithmetic, algebra, and geometry)
- Science (natural sciences, physical sciences, and environmental sciences)
- Social sciences (history, civics, economics, anthropology, sociology, and geography)
- Aesthetic development (music, drama, and visual arts)

Elementary children are developing toward intellectual discovery, examining “why” and “how” questions. At this stage, the “reasoning mind” is emerging. Hands-on experiences that apply skills to a wide range of projects and activities include:

- Classifying the world using knowledge systems derived from the educational disciplines;
- Understanding time and change;
- Building a sense of moral order.

[39] Irinyi, M. (2008, July 15). Montessori Philosophy: Moving from Concrete to Abstract. NAMC Montessori Teacher Training Blog. https://montessoritraining. blogspot.com/2008/07/montessori-philosophy-moving-from.html.

The WUNYCS Elementary Program will use the following curriculum and standards:

Elementary Standards:

Content Area	**Selected Curriculum/Standards**
Language	Montessori Language Curriculum + NYS CCSS for English Language Arts
Mathematics	Montessori Mathematics Curriculum + NYS CCSS for Mathematics
Science + Technology	Montessori Cosmic Studies Curriculum + NYS CCSS for Science + Next Generation Science Standards
Social + Cultural Studies	Montessori History and Geography Curriculum + NYS CCSS for Social Studies
The Arts	NYS CCSS for Visual and Performing Arts
Social-Emotional	Montessori Practical Life, Sensorial, Aesthetic, and Personal Development Curriculum Montessori Peace Keepers Curriculum and Mindup
Health + Physical Education	NYS Physical Education Learning Standards
English Language Learning	Identification: New York State Identification Test for English Language Learners (NYSITELL) Assessment: New York State English as a Second Language Achievement Test (NYSESLAT) If necessary depending on enrollment: Lexia or Raz Plus are curriculums we may utilize for ELL students

Montessori Curriculum

As Wildflower Schools are authentic Montessori schools, Wildflower Upstate NY adheres to international standards of authentic Montessori as articulated in the Montessori National Curriculum, developed through an international partnership between The Montessori Australia Foundation, The North American Montessori Teachers Association (NAMTA), and Association Montessori Internationale (AMI).

Authentic Montessori schools have:

• Teachers trained in the Montessori method
• Multi-age classrooms, organized around intentional developmental stages
• Uninterrupted “work cycles”: usually three hours in the morning and three in the afternoon
• Child-directed (and teacher-guided) choice of learning activity

As at least one teacher leader in each classroom will be Montessori credentialed, they will have had experience in curriculum mapping through their training. During Montessori teacher training through either the Association of Montessori International USA (AMI) or American Montessori Society (AMS), teachers create albums of Montessori standard aligned lesson plans. In order to achieve Montessori certification, a teacher’s albums of lesson plans are reviewed by AMI or AMS as aligning to the Montessori curriculum and meeting Montessori standards.

We will adapt and use the Montessori National Curriculum according to the Planes of Development, a structured pedagogical approach based on deep analysis and appreciation of individual children[40]. As mentioned previously, the curriculum and scopes will be reviewed with our teacher leaders as well as the executive director. In addition to the curriculum, resources that will support planning include carefully designed materials, refined through decades of practice, are used to teach students and provide opportunities for exploration in which children teach themselves and their peers in a mixed age group setting. Through careful observation and tracking of data, teacher leaders' presentations may be adjusted to align with specific points of interests- based on individual children’s learning objectives and a trajectory customized for each child in the classroom. While there is an overall scope and sequence to Montessori, our teacher leaders recognize that the scope and sequence is linear only when there is a dependency between specific learning objectives. Beyond that, and especially given our inclusive classroom model, it is personalized for individual children.

Montessori Materials

There is consistency across authentic Montessori classrooms in that specific materials are used explicitly to support skill development. Teacher leaders are provided with Montessori learning materials which are to be meticulously arranged and available for use in an aesthetically pleasing environment. Further, lessons and themes are presented individually or in developmentally appropriate, multi-age groupings. At least one of our Teacher Leaders in the co-taught classroom must be Montessori certified by an approved teacher training program (AMI, AMS) and must use Montessori materials in implementing their instructional programs. Our specific model allows for a teachers assistant, aiding the teacher leader in daily practice and administrative tasks.

The Montessori National Curriculum[41] meets children's physical, intellectual, social, and emotional needs at progressive stages of maturity. Students who complete the fully

[40] Feez, S., & Miller, J. (2011). *Montessori national curriculum*. Montessori Australia Foundation.
[41] Montessori, M. (2004). *The Montessori method: The origins of an educational innovation: Including an abridged and annotated edition of Maria Montessori’s The Montessori method.* Rowman & Littlefield.

implemented Montessori primary and lower elementary curricula are positioned to meet or exceed standards for language, math, science, social studies and other subject areas, and the method uniquely situates its classrooms both to support and benefit from a push-in model of special education and MLL instruction.[42]

Montessori National Curriculum Summary Table

Site	Practical Life	Sensorial	Mathematics	Language	Cultural Studies Science, Geography, History	Aesthetic & Personal Development
PK3	Preliminary exercises; pouring, carrying, polishing, care of person, care of indoor/outdoor environment, Grace & Courtesy	Visual, auditory, tactile, olfactory, gustatory discrimination	Numbers to ten	Spoken language - objects in the environment, read-aloud, sound games, mechanics of writing	Observing natural phenomena, planting & watering	Drawing & painting, singing, musical notation, visual thinking strategies
PK4	Sewing, washing, folding, ironing clothes, preparing food, setting a table, passing objects, accepting and refusing	Temperature, olfactory, constructive triangles, inscribed and concentric figures, bells, music signs and notes	Decimal system, linear counting, memorization of addition, multiplication	Reading, sound-letter correspondence, hand phonetic object game	Puzzle maps, botany cabinet (leaf shapes), zoology vocabulary	
K	Making an introduction, how to apologize, walking gracefully as not to disturb	Chromatic sense, geometric forms (solid and cabinet material)	Skip counting with chains, memorization of addition, multiplication, subtraction, division, passage to abstraction (small bead frame, division with racks & tubes, fractions, measurement)	Phonetic reading, phonograms, word study, puzzle words, reading classification, first books, function of words, parts of speech, word study, spelling	Land and water forms, classification (living, non-living, plant-animal), time, culture/country study	
1 2 3	Care of the environment - plants and animals, table manners, serving and clearing, all of the above, plus mentoring of younger students, preparation for going out	**Geometry & Measurement** Geometry: congruent, similar, equivalent angles, lines, polygons, circles, mass, volume, length	History of math, counting, decimal system, operations, memorization, money, fractions, passage to abstraction	History of language, parts of speech, reading analysis, grammar and syntax, composition, research, functional writing, literature timelines, literature circles, speeches, discussion, debate, drama	Time, first knowledge, natural history (timeline of life), geography (physical and political), nature of the elements, sun & earth, plant kingdom, animal kingdom	Artist study, elements of design, principles of design, choir, band, musical theater, music composition, visual thinking strategies
4 5 6	Care of environment, going out, preparation for tests	**Geometry & Measurement** History of geometry, history of measurement, solid geometry, plane geometry, symmetry, similarity, congruence, equivalence	Data & statistics, percentages, fractions & decimals, powers of numbers, squaring & cubing, algebra, relative numbers	Literature timelines, literature circles, speeches, discussion, debate, drama, advanced study of style	Society & civilization, migration, inquiry & research, map reading & making, work of air, atmosphere & wind, work of water, economic geography, work of humans, chemistry of the plant, human physiology, extended research	All of the above, plus: small ensembles, festival opportunities

At WUNYCS, our educational philosophy is rooted in the authentic Montessori method, emphasizing inclusion, self-directed learning, and equity to create a nurturing and empowering environment for every child. We believe that education should be child-centered, honoring each

[42] Renton, A. M. (1990). The Montessori environment as a setting for bilingual education. Implementing Montessori in the public sector, 157-161.)

student's unique learning style, pace, and interests while fostering independence, curiosity, and a lifelong intrinsic love of learning.

Our approach integrates hands-on, experiential learning with collaborative exploration, allowing students to develop not only academic skills but also social-emotional intelligence, critical thinking, and problem-solving abilities. We are committed to equity in education, ensuring that all students—regardless of background or ability—have the tools, resources, and support needed to thrive. By fostering a strong sense of belonging and respect, we empower students to embrace their identities, contribute meaningfully to their community, and develop a deep sense of responsibility and compassion for creating a more inclusive and just society. An authentic Montessori classroom, in its curriculum and materials, align closely with our educational philosophy in several ways.

Montessori classroom materials are designed to engage all the senses, making learning more tangible and accessible, particularly for students with disabilities. These hands-on materials help all learners build a deep conceptual understanding before progressing to more abstract ideas. Maria Montessori recognized, and research confirms, that movement, touch, and sensory exploration are critical to cognitive growth. In a Montessori classroom, children interact with carefully crafted materials—such as polished wood, smooth metal, and textured fabrics—allowing them to grasp complex concepts through direct physical experiences. Scaffolded learning is at the core of our inclusive Montessori model, ensuring that all students, including those with disabilities, receive the support they need to build independence and mastery. By utilizing a weighted lottery students with disabilities, we are demonstrating that Montessori's hands-on, student-driven approach is not only effective but essential for all learners. The use of concrete materials allows students to progress naturally from hands-on exploration to abstract thinking, ensuring deep conceptual understanding rather than rote memorization.

Our Teacher Leaders play a critical role in observing students, introducing lessons at developmentally appropriate moments, and stepping back to allow independent discovery. In a lower elementary classroom, for example, a Teacher Leader may introduce "Dynamic Addition" with golden beads, helping a child grasp place value and regrouping through hands-on learning. As the student gains confidence, they transition to working on their own, receiving guidance only when needed and progressing to more complex problems as mastery develops. This gradual release of responsibility, embedded in Montessori's self-correcting materials, proves that students of all abilities can thrive in an environment designed to meet their individual needs, reinforcing our commitment to Montessori as a powerful and inclusive educational model.

Montessori materials also support individualized learning, meeting students at their developmental level. Teachers scaffold learning by guiding children to new materials that build on their skills, such as transitioning from number rods to spindle boxes when a child needs reinforcement in numeracy. This flexibility is particularly beneficial for students with disabilities, as it allows them to progress at their own pace with multi-sensory support. The materials

utilized in a Montessori classroom align with our mission to provide every child access to the tools, resources, and support needed to thrive.

Montessori Peace Education

Montessori Peace Keepers are a fundamental part of Montessori's approach to conflict resolution and social-emotional learning, empowering children to resolve disagreements independently and with respect. Rooted in Maria Montessori's vision of peace education, Peace Keepers are often students who are trained to help mediate conflicts, guide discussions, and model respectful communication within the classroom.

In addition to a child centered curriculum and beautifully made, carefully chosen materials, Peace education is a staple of Montessori curriculum. Peace education aligns with our vision of fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging. In a Montessori classroom, peace education is woven into daily interactions, emphasizing respect, empathy, and collaboration. Teacher leaders explicitly teach social emotional skills to students by engaging in ways to ensure students are 'Peace Keepers.' When conflicts arise, Peace Keepers assist peers in using peaceful communication tools, such as a designated space-perhaps a peace table/peace corner, where students can engage in conflict resolution. They help guide conversations by ensuring that each person has a turn to speak, encouraging active listening, and fostering mutual understanding. Rather than imposing solutions, Peace Keepers support their classmates in finding resolutions that are fair and considerate of everyone involved. This approach not only builds social-emotional skills but also encourages students to take responsibility for maintaining a harmonious classroom community. Through practicing conflict resolution, self-regulation, and emotional awareness, Montessori Peace Keepers cultivate a culture of respect, inclusion, and cooperation, reinforcing Montessori's belief that education is a foundation for peace in the world.

The Peace Keepers program at WUNYCS aligns directly with our mission and vision by fostering an inclusive, empowering learning environment where every child feels valued and supported. By teaching students conflict resolution, active listening, and mutual respect, Peace Keepers reinforce the Montessori principles of self-direction, hands-on learning, and collaborative exploration, ensuring that students develop essential social-emotional skills alongside academic growth. This child-centered approach encourages independence while promoting a strong sense of community within the classroom.

In alignment with our vision of equity and belonging, Peace Keepers help cultivate a school culture where students learn to embrace their unique identities while respecting others. By guiding their peers in peaceful conflict resolution, they foster responsibility, empathy, and cooperation, empowering students to contribute meaningfully to their school and beyond. This commitment to compassion and inclusion prepares students not only for academic success but also for their role in creating a more accepting and just society.

Teachers as Leaders

At Wildflower, teachers take on both instructional and administrative responsibilities, working in collaborative, non-hierarchical teams. In this co-leadership model, teacher-leaders function as partners and social entrepreneurs, collectively accountable for the success of their school. Operating on a small scale allows them to make responsive, day-to-day decisions that directly address students' needs while also shaping long-term school-wide strategies that reflect their vision and the needs of children, families, and the broader community. When additional support is needed, the Wildflower Foundation provides professional guidance, tools, and resources to help teacher-leaders navigate challenges and strengthen their school's impact. As such teacher leaders, the executive director, as well as sibling Wildflower Schools and Wildflower Foundation partners are able to work collaboratively when revisions and support is needed.

WUNYCS Teacher Leaders will use record-keeping and observation tools to track student learning across all curricular areas, aligning observations with standards mastery throughout the year. They will utilize pacing guides, observation technology, and formative assessments to ensure students are making progress. Since Montessori classrooms are student-driven, Teacher Leaders play a crucial role in introducing lessons, observing student engagement, assessing progress, and making instructional adjustments to ensure all students move toward mastery. By guiding students toward the materials and experiences that best support their development, teachers can provide personalized learning pathways that align with each child's needs.

Proposed processes and procedures to review, evaluate, and revise curriculum is as follows:

- Data-Driven Curriculum Review – Teacher leaders and the executive director will meet in advance of family conferences (to be determined by teacher leaders but approximately 3 times a year) to review student performance data, assessment outcomes, and observation reports. This ensures that curriculum adjustments are based on actual student learning trends rather than assumptions. Our findings will be shared with the Board of Trustees, specifically any academic committees formed in regards to oversight of academic excellence.
- Teacher-Led Curriculum Adjustments – Teacher leaders will play an active role in curriculum evaluation by participating in monthly reflection meetings as partners, where they discuss lesson effectiveness, student engagement, and any necessary scaffolding. This allows for continuous feedback and real-time curriculum adaptations. As needed, the executive director may act as a thought partner in these conversations.
- Alignment with State Standards – The Montessori scope and sequence will be mapped to New York State Common Core Learning Standards, ensuring that students meet grade-level expectations while progressing at their own pace. The executive director and teacher leaders will work collaboratively to conduct an annual curriculum audit to ensure alignment and make any necessary modifications. Again, these findings will be shared with academic committees on our Board of Trustees.
- Grade-to-Grade Continuity – To ensure smooth transitions in subsequent years between Montessori grade bands, teacher leaders from each level (Primary, Lower Elementary, Upper Elementary) will engage in cross-grade collaboration at least three times a year.

This will include vertical team meetings where teachers analyze student progress and curriculum gaps, ensuring a coherent learning journey.

- Annual Curriculum Review & Professional Development – The executive director and academic committees on the Board of Trustees will conduct a formal annual curriculum review, incorporating teacher feedback, student performance data, and best practices from Montessori research. Teachers will receive ongoing professional development, ensuring they are equipped to implement curriculum updates effectively. The early childhood special education teacher as well as teachers assistants will have ongoing Montessori professional development opportunities as well as professional development related to servicing students with disabilities.

Through these structured processes, WUNYCS ensures that its Montessori curriculum remains effective, inclusive, and aligned with both state standards and Montessori philosophy, providing all students with a high-quality, developmentally appropriate education.

Ongoing Research and Innovation

Beyond individual classrooms, The Wildflower Foundation actively participates in educational research and innovation. Collaborating with organizations such as Association Montessori International USA and the American Montessori Society, Wildflower Schools ensure that its curriculum remains research-driven and continuously refined. Wildflower also engages in partnerships with academic researchers, developmental psychologists, and education technology experts to explore innovative approaches to Montessori education. Wildflower Schools follows 9 principles that guide the network, one of which is a decentralized network: working with their communities by sharing data, engaging in open-source collaboration, and scaling proven practices. We will partner with local independent Montessori schools such as RiverRun Montessori and Little Ones Montessori to continuously engage in communication around best practices and share ideas. Both schools have already assisted in the application phase of our school by offering advice and feedback throughout our curriculum drafting. We will also partner with the BSCSD schools to share best practices, which is further outlined in R-15 - District Relations. Additionally, Wildflower participates in a national network of public Montessori programs, fostering ongoing dialogue and shared learning to strengthen best practices across public Montessori education.

b. Assessment System

WUNYCS prioritizes student observation and data-driven instruction to ensure meaningful learning, curriculum development, and accountability for student progress. Our comprehensive assessment plan tracks students' growth toward NYS Common Core Standards while nurturing independent, self-motivated learners. With a strong focus on equity, our assessments are designed to support rather than hinder student development, particularly for students with disabilities, those from economically disadvantaged backgrounds, and English language learners. Grounded in the Montessori Method, our approach emphasizes scientific observation, record-keeping, and responsive instruction to meet each child's unique needs.

In a Montessori classroom, diagnostic assessments look different from most traditional schools in that instead of standardized pre-tests, teacher leaders use observation based assessments to understand a child's prior knowledge, developmental readiness, and learning style before introducing new lessons. These assessments are informal, hands-on, and deeply individualized, allowing teachers to then guide students along their unique learning paths.

At the heart of Montessori assessment is teacher observation. Montessori guides carefully watch how children interact with materials, noting their focus, independence, problem-solving abilities, and social-emotional development. Simple activities, such as pouring water, using a pincer grip, or sequencing number rods, provide insight into a child's fine motor skills, numeracy, and readiness for writing or math concepts. Through practical life exercises, teachers assess how well students manage self-care tasks, preparing them for more complex academic work.

Language development is also evaluated through interactive and sensory-rich activities. Teacher leaders observe a child's phonemic awareness using sandpaper letters, assess comprehension through story retelling, and introduce vocabulary using the three-period lesson method to see if a child can recognize, name, and recall new words. Similarly, math readiness is diagnosed using golden beads and spindle boxes, allowing students to physically manipulate numbers and demonstrate their understanding of quantity, place value, and sequencing.

Beyond academics, Montessori diagnostic assessments extend to social-emotional and executive function skills. Teachers note how students navigate problem-solving and conflict resolution at the Peace Table, as well as how they manage attention span, impulse control, and following multi-step directions. These observations help create a complete picture of a child's development, ensuring that the learning environment supports both their cognitive and emotional growth.

Rather than relying on paper based tests, Montessori teacher leaders allow students to lead their learning, taking note of their interests, engagement, and natural strengths. A child's curiosity and the way they choose and engage with materials provide valuable insight into their learning style. This diagnostic approach ensures that students are met exactly where they are developmentally, creating a personalized, responsive, and enriching educational experience.

While Montessori Observation and Record-Keeping Protocols remain central, we also recognize the potential of technology to enhance student tracking and assessment. Teacher Leaders will have the flexibility to transition from traditional paper-based methods to digital tools, allowing for greater efficiency, accuracy, and alignment with broader education standards. For example, teacher leaders may choose to utilize Transparent classroom, a widely used Montessori record-keeping platform that allows teachers to document student progress, track lessons, and generate reports while maintaining an authentic Montessori approach. This continued formative assessment takes place daily in an authentic Montessori classroom- the same observational noticings taken during diagnostic assessment continue in the form of ongoing formative assessment. The executive director will partner with teacher leaders in overseeing data collection and reporting, ensuring compliance while upholding Montessori's

balance of academic achievement and social-emotional growth.

WUNYCS will utilize the following formative and summative assessments to measure student progress and growth:

- Ongoing Assessments to measure student growth including NYS Assessments at appropriate grade level
- Montessori coursework and student portfolios to provide an ongoing record of student work that ensures mastery, based on Montessori lesson rubrics and checklists
- Formative Assessments to measure achievement on an ongoing basis, including language development, developmental reading, and writing assessments, along with common core standards-based assessments in literacy and math

In a Montessori environment, assessment is integrated, observational, and student-centered, ensuring that children are evaluated in a natural, developmentally appropriate way rather than through traditional standardized testing. However, to identify learning gaps, including those caused by COVID-related disruptions or prior underserved educational settings, our school will employ a multi-layered approach to assessment that remains true to Montessori philosophy while ensuring all children receive the targeted support they need to thrive.

These assessments will help pinpoint disruptions in learning that may have resulted from pandemic-related interruptions or lack of prior access to high-quality education. Recognizing that learning loss disproportionately affects students with disabilities, English language learners, and those from underserved backgrounds, our approach will prioritize early identification of students who may need additional support. We will also implement Montessori-aligned developmental screenings for speech, fine motor, and cognitive skills, ensuring students who need Individualized Education Programs (IEPs) or specialized interventions are identified early and provided with the appropriate support.

Additionally, our school will integrate equity-based assessment tools, ensuring that our measurement of learning loss is culturally responsive, accessible, and free from bias. This includes alternative assessment methods for neurodiverse learners, allowing children to demonstrate knowledge through movement, hands-on materials, and oral storytelling rather than only written work, when applicable. Students who are already identified as requiring an IEP will be assessed in line with their IEP goals. WUNYCS is committed to equity, inclusion, and proactively supporting English language learners. Within the first 15 days of enrollment or transfer into our school, all K-6 students will take the NYS Identification Test for English Language Learners (NYSITELL) to determine eligibility for English Language Learner services. To ensure continued progress in English language proficiency, students in bilingual/ESL programs will be assessed annually using the New York State English as a Second Language Test (NYSESLAT), which evaluates reading, writing, listening, and speaking skills during the designated testing window. Our commitment to meeting the diverse needs of all learners ensures that every child receives the necessary language support to thrive academically and socially.

To bridge identified learning gaps, we will use Montessori's built-in scaffolding approach, allowing students to repeat and revisit work in an effort to gain proficiency in foundational skills at their own pace. Multi-age classrooms will serve as an additional supportive structure, enabling older students to reinforce their own learning while mentoring younger peers, further strengthening both academic and social-emotional recovery.

By maintaining a Montessori-based assessment framework that emphasizes observation, developmental appropriateness, and individualized learning, we will identify and address gaps in student learning while ensuring that every child, including those with disabilities, receives the resources and support needed to succeed. At WUNYCS, we know that traditional paper-based written tests do not align with the hands-on, exploration driven approach in authentic Montessori classrooms. However, while students demonstrate understanding through manipulatives, practical application, and observation-based mastery, there are times as they age and grow wherein concrete materials may be removed to introduce more abstract concepts. We also want to ensure we are assessing the whole child- that is- including executive functioning as well as social-emotional skills throughout the year.

We want to be mindful of not over assessing students, and carefully selected the following assessment agenda on the next page in order to ensure we are supporting teacher leaders in gaining further understanding about their students without adding stress to children's lives in the form of too many assessments. In addition, we carefully selected assessments that both compliment the Montessori classroom as well as align to NYS Common Core standards.

Domain	**Assessment Focus**	**Source**	**Purpose**	**Grade**	**Frequency**
ELA	Montessori Language Standards	Montessori Language Curriculum	Assess work process and proficiency as predictors of NYS CCS alignment.	Pre-k - 6th grade	Recorded daily
ELA	Benchmark Literacy Assessment	DIBELS	phonemic awareness, phonics, fluency, and comprehension.	Pre-k - 6th grade	Three times annually
ELA	NYS ELA Standards	NYS Common Core	Assess NYS Standards proficiency	3-6th	Once annually
Whole-Child Development	Development: -Adaptive -Personal-Social -Communication -Motor Skills -Cognitive	BDI-3	Identification of potential delays/need for evaluation	Pre-k - 6th grade	Twice annually

English learner fluency	NYS Identification Test for English Language Learners (NYSITELL)	NYSISTELL	Identify students who are multilingual/ identification of English Language Learners	K - 6th grade	Upon enrollment or transfer (within 15 days)
Fluency in English	NYS English as a Second Language Test (NYSESLAT)	NYSESLAT	Assess progress in developing English language proficiency	K - 6th grade	Once annually to all ELL's
Math	Montessori Mathematics Standards	Montessori Mathematics Curriculum	Assess work process and proficiency, predictor of proficiency as aligned with NYS CCS	Pre-k - 6th grade	Recorded daily
Math	NYS mathematics standards	NWEA MAP	Leading indicator of growth and proficiency for NYS assessments	K - 6th grade	Twice annually
Math	NY State mathematics standards	NYS Common Core	Assess NYS Standards proficiency	3-5th	Once annually
Science	Montessori Practical Life and Sensorial work	Montessori curriculum	Assess work process and proficiency	Pre-k - 5th	Recorded daily
Executive Functioning	Montessori Practical Life and Social & Emotional Development work	Montessori curriculum	Assess work process and proficiency	Pre-k - 6th	Recorded daily
Social-Emotional	Montessori Social/ Emotional work	Montessori curriculum	Assess work process and proficiency	Pre-k - 6th	Recorded daily

Observation is a cornerstone of the Montessori approach, allowing teachers to assess student progress and guide instruction based on real-time engagement. While Dr. Montessori utilized the technology available in her time, advancements in information technology now offer opportunities to enhance and streamline assessment practices. Traditionally, Montessori educators have relied on manual journals to document observations, which can be time-consuming. Today, technology provides a way to maintain the integrity of Montessori's observational methods while increasing efficiency and accessibility for teacher leaders. All

Wildflower Schools believe in embracing innovative tools to support authentic Montessori instruction. From the school's launch, Teacher Leaders will be able to utilize Transparent Classroom, a digital platform specifically designed for Montessori educators to record, track, and assess student progress. By using tablets to document observations in real time, teachers can instantly integrate data into a comprehensive online system, allowing for seamless tracking of individual and classroom progress. This approach ensures that ongoing assessment remains rigorous, high-quality, and easily accessible, empowering educators to make informed, data-driven decisions while staying true to the Montessori philosophy.

The main goal of external assessments is to track student progress and readiness for standardized state exams. If teacher leaders determine that the selected assessments do not provide valid or reliable indicators, or if state assessments undergo changes, we will remain flexible and re-evaluate our assessment choices annually to ensure they align with the most accurate and up-to-date information available.

At Wildflower schools, Teacher Leaders have full autonomy in decision-making. Executive directors work as a shared partner in determining valid and reliable assessments throughout this decision making process. This independence is reflected in our approach to interim assessments, where Teacher Leaders have the flexibility to determine the most effective ways to measure student progress while ensuring alignment with both authentic Montessori education and state standards. Teacher leaders will also have the autonomy to decide if additional assessments may be needed and which tools will best serve their students. The executive director may also provide support in identifying valid and reliable assessments, ensuring that educators have the resources necessary to make informed, student-centered choices while maintaining Montessori integrity.

As Teacher Leaders identify state standards that could be supported by other Montessori materials or other interventions, they will be responsible either for adapting or supplementing Montessori materials, doing so in ways consistent with child-directed principles of Montessori learning. Transparent Classroom will be a shared resource for documenting both the standards analysis and the ways Teacher Leaders are adapting learning materials and guidance across the New York schools to incorporate state standards. We will actively collaborate with one of our 'sibling schools', Wildflower New York Charter School (WNYCS), throughout our first several years to deepen our understanding of best practices and ensure alignment with New York State Common Core standards. As part of the Wildflower network, we are committed to a culture of shared learning and resource exchange, which will further strengthen our instructional approach and implementation.

Transparency with Data

A core belief of Wildflower Schools is transparency. We will work to ensure that families, the executive director, as well as any other stakeholders (for example, those providing services to students with disabilities/ELL's) remain informed about student progress and have access to data through Transparent classroom. Teacher Leaders will have continuous access to assessment data through Transparent Classroom, allowing them to track student growth and

tailor instruction accordingly. Families will be regularly updated on student progress through progress reports and family conferences, ensuring open communication about their child's learning journey.

The Board of Trustees will establish an academic excellence committee, responsible for ongoing collaboration with Teacher Leaders and the executive director to uphold authentic Montessori principles while ensuring the school meets its public accountability requirements. Additionally, Teacher Leaders will present assessment data to the Board of Trustees, interpreting its significance and discussing any potential programmatic adjustments. Board of Trustees governance, financial management, and school improvement experts may be engaged as needed to provide guidance and support in maintaining the integrity and success of the school.

In Montessori classroom settings, students take responsibility for tracking their own learning by maintaining journals that document their work and progress. Alongside these student-kept records, Teacher Leaders will utilize Transparent Classroom to collect and analyze assessment data. To ensure individualized support, weekly teacher-student conferences are a core part of the Montessori classroom structure, allowing educators to provide feedback, set goals, and guide students in their learning journey.

At WUNYCS, we strive to create a seamless connection between home, school, and the community, ensuring that children experience consistent support and engagement in every environment. We view education as a partnership with families, valuing their insights, encouraging their involvement, and openly sharing our Montessori approach. Rather than seeing themselves as passive recipients of a school service, families at our school play an active role in supporting both the school and Teacher Leaders, fostering a collaborative and engaged learning community. Through this mutual investment in a child's development, we build a shared commitment to their growth, both academically and personally.

Teacher Leaders will maintain regular communication with families regarding student progress. This includes ongoing education for families about Montessori principles, ensuring they understand and can support their child's learning experience. A distinctive feature of WUNYCS is the dedicated time during arrival and dismissal when Teacher Leaders, students, and families can connect informally about the day's learning, skill development, and behavior. These daily touchpoints foster strong relationships, trust, and deeper family engagement with the Montessori method. Additionally, structured parent-teacher conferences will occur three times a year (beginning, middle, and end- trimester approach), providing a dedicated space to review academic, social-emotional, and behavioral progress.

To ensure families remain well-informed and engaged, Teacher Leaders will develop systems tailored to their school communities, ensuring transparency and accessibility of student progress updates. Regular family surveys will help assess engagement and satisfaction, reinforcing our commitment to a collaborative, student-centered educational experience.

c. Instructional Methods

Montessori pedagogy is built on the foundation of self-directed learning and independence, allowing children to choose their own work within a carefully prepared environment. Learning is driven by intrinsic motivation, where curiosity takes precedence over external rewards or grades. In our Ballston Spa Central School District elementary schools, students are extrinsically motivated through PBIS systems using token economies. Alfie Kohn, in his book *Punished by Rewards: The Trouble with Gold Stars, Incentive Plans, A's, Praise, and Other Bribes*, argues that extrinsic motivators, such as token economies, can undermine intrinsic motivation. He suggests that reward-based systems may lead individuals to focus on obtaining rewards rather than finding inherent satisfaction in the activity itself, potentially diminishing genuine interest and creativity[43]. An authentic Montessori approach encourages students to take ownership of their education, fostering a deep sense of responsibility and self-motivation.

Rather than serving as traditional instructors, Montessori teachers act as guides, observing and facilitating lessons at the most appropriate moment for each child. Instruction is individualized based on developmental readiness, ensuring that students receive new material when they are best prepared to absorb and apply it. This personalized approach nurtures confidence and mastery, allowing children to learn at their own pace rather than adhering to a rigid curriculum schedule. In our co-taught model, two educators work seamlessly together to share responsibility for the learning environment, enhance the depth and accuracy of observational data, ultimately improving student support and instructional decisions.

With two adults in every classroom, educators can divide their focus across different areas, ensuring that each child receives meaningful attention without disrupting the flow of independent learning. One teacher may facilitate a small-group lesson, while the other quietly observes students engaging with materials, tracking how they approach problem-solving, self-correction, and collaboration. This structure between a Teacher Leader and teacher's assistant allows for real-time data collection, leading to more informed, individualized instruction based on authentic student engagement rather than standardized testing alone.

Additionally, co-teaching in Montessori reduces bias and increases accuracy in assessment. Multiple teachers observing the same student from different perspectives create a more comprehensive understanding of a child's learning patterns, social-emotional development, and areas requiring additional support. This is particularly beneficial for students with disabilities, as it ensures that subtle learning differences and progress markers are captured and addressed. With stronger collaborative observation, teachers can adjust lessons, interventions, and material offerings in ways that are responsive to student needs while maintaining Montessori's child-led, exploratory approach.

[43] Kohn, A. (1993). *Punished by rewards: The trouble with gold stars, incentive plans, A's, praise, and other bribes.* Houghton Mifflin.

Classroom Management

By leveraging the strengths of co-taught classrooms, Montessori schools enhance the quality of observational data, leading to a more inclusive, adaptive, and effective learning experience for all students. Classroom management in a co-taught inclusive Montessori setting is rooted in structure, collaboration, and respect for the child's independence. With two educators present, co-teachers fluidly rotate between roles—one leading a small group lesson while the other observes, supports students individually, or documents progress. This approach ensures that all students receive responsive, individualized guidance without disrupting the natural flow of the classroom.

Independence is encouraged through clear expectations, gentle redirection, and self-regulation strategies rather than rigid discipline. Teachers use nonverbal cues, peer leadership, and proactive interventions to support focus and emotional regulation. In an inclusive setting, co-teachers ensure that all students have equitable access to the learning environment by providing adaptations such as alternative seating, visual schedules, and hands-on materials tailored to different learning needs. The presence of multiple educators allows for differentiation without singling out students, reinforcing a truly inclusive atmosphere where all children can thrive.

Social learning and conflict resolution are woven into daily interactions, with co-teachers modeling and guiding peer mediation and fostering a culture of respect and collaboration. By observing student dynamics and proactively addressing challenges, teachers create a calm, community-driven environment where children learn to navigate their emotions and relationships. The co-teaching model enhances classroom management by ensuring consistent, individualized support, allowing students to develop independence, confidence, and a strong sense of belonging within the Montessori framework.

Pedagogy Overview

A core principle of Wildflower Schools is an emphasis on beauty, reflecting Montessori's belief that a carefully prepared environment nurtures focus, independence, and a love of learning. Unlike many traditional classrooms, physical Montessori spaces are intentionally designed to be calm, inviting, and orderly, allowing children to explore and engage with their surroundings freely. Natural light, soft colors, and carefully arranged materials create a peaceful atmosphere, while wooden trays, woven baskets, and glass bowls replace plastic, instilling respect for materials and the environment. Plants, flowers, and nature-inspired artwork bring warmth and connection to the natural world, reinforcing the Montessori principle of caring for one's space. Children actively maintain the beauty of their classroom, fostering pride, responsibility, and a sense of belonging. At Wildflower Schools, the prepared environment is more than just a classroom—it is a beautiful, purposeful space that supports self-directed learning, exploration, and deep engagement with the world.

A hallmark of Montessori education is its emphasis on hands-on, concrete learning before abstraction. Specially designed, self-correcting materials help children develop deep

conceptual understanding through sensory experiences. For instance, golden beads introduce mathematical place value in a tangible way before students transition to abstract number operations. This gradual progression ensures that learning is meaningful and fully internalized.

Multi-age classrooms are another key feature of Montessori pedagogy, reflecting real-world social structures where students of varying ages work together. Younger children learn from older peers, while older students reinforce their own understanding by teaching concepts they have mastered. This dynamic fosters collaboration, mentorship, and a sense of community within the classroom.

Montessori also embraces freedom within limits, allowing students to choose their work while maintaining clear expectations that promote focus, responsibility, and self-discipline. This structure cultivates executive function skills, including time management and decision-making, preparing children for lifelong success.

Assessment in Montessori settings is observation-based and highly individualized. Instead of relying solely on standardized testing, teachers track student progress through engagement with materials, application of knowledge, and demonstration of proficiency. Students are encouraged to show their understanding not just through written work, but through hands-on learning and even by teaching their peers.

What makes Montessori pedagogy truly unique is its trust in children as active learners. Unlike traditional education, which often emphasizes rote memorization and direct instruction, Montessori prioritizes long, uninterrupted work periods that allow for deep concentration and meaningful engagement. It equally values social-emotional learning alongside academic achievement, helping students develop essential life skills in critical thinking, problem-solving, and independence. Through this approach, Montessori education nurtures confident, capable learners who are prepared to navigate an ever-changing world.

Research Based Teaching and Learning

Research indicates that faithful implementation of the Montessori philosophy and method is essential for achieving positive student outcomes. A study comparing social and academic skills among students in three types of programs—high-fidelity Montessori, modified Montessori with conventional elements, and traditional schooling—found significant differences over time. While there was no initial advantage in diagnostic tests at the start of the school year, students in authentic, high-fidelity Montessori programs showed significantly greater gains in executive function, reading, math, vocabulary, and social problem-solving compared to those in modified Montessori or traditional programs[44]. These findings suggest that strict adherence to Montessori principles leads to stronger academic and social growth than programs that dilute the method with conventional practices.

[44] Angeline Lillard, “Preschool children's development in classic Montessori, supplemented Montessori, and conventional programs,” Journal of School Psychology June 2012: 379-401.

The article *Children with Disabilities Attending Montessori Programs in the United States* by Long, Ferranti, and Westerman (2022) explores the experiences of students with disabilities in Montessori schools across the U.S. The study examines the perceptions of Montessori educators regarding inclusion, their preparedness to support students with disabilities, and the alignment between Montessori pedagogy and special education best practices.

The researchers found that Montessori educators generally hold positive attitudes toward inclusion and believe that the Montessori environment naturally supports diverse learners. Key elements of Montessori education, such as individualized learning, hands-on materials, multi-age classrooms, and an emphasis on independence, align well with the needs of students with disabilities. The study highlights how self-paced learning and sensorial materials can benefit children with a range of disabilities, including those with learning differences, ADHD, and autism[45].

Pinyon Montessori operates within the Wildflower Network and similarly to our model, is committed to liberatory education, expanding access to authentic Montessori programs. Chip Reichanadter: Elementary Guide and Board of Trustees Chair for Pinyon Montessori highlights that the school's sliding-scale tuition model fosters socioeconomic diversity, breaking down barriers for historically marginalized families, including immigrants and undocumented individuals. Their approach ensures inclusivity for all families. In the article "Pinyon Montessori Wants To Provide A School For Anyone and Everyone," Chip Reichanadter says- which emphasizes the school's commitment to accessibility and equity: "Families pay what they can to our school, so it's accessible, which is different from most Montessori schools. Families fall into a tier based on their income and their household size."

All Wildflower Schools are committed to intentionally cultivating diverse communities of both families and educators, ensuring that everyone is welcomed equitably. These classrooms serve as a model for inclusive learning environments, where harmony and diversity coexist. The goal is for students to develop an appreciation for diversity, as well as the collaborative and conflict resolution skills necessary to navigate an increasingly interconnected world. This aligns closely with our schools commitment to equity, inclusion, and belonging in all aspects of our school community. By embracing each child's unique identity, we empower them to engage meaningfully, act with compassion, and contribute to a more inclusive world.

Research supports the positive impact of diverse learning environments on student growth. Similar effects have been observed in diverse workplaces, where employees exhibit higher levels of creativity and analytical rigor[46]. Wildflower Schools recognize that learning in a diverse setting is fundamental to preparing students for a pluralistic society, but also acknowledge that addressing historical injustices requires the explicit teaching of justice and equity.

[45] Long, T., Ferranti, N., & Westerman, C. (2022). Children with disabilities attending Montessori programs in the United States. *Journal of Montessori Research, 8*(2), 16–32.
[46] Phillips, K. W. (2014). *How diversity makes us smarter*. *Scientific American, 311*(4), 42-47.

A tuition-free public Montessori micro-school designed for students with special needs and disabilities aligns naturally with Montessori instructional methods, which emphasize individualized, hands-on learning. Montessori's use of self-correcting materials and concrete experiences supports students in grasping concepts at their own pace, making it especially effective for those who benefit from alternative learning approaches. The flexibility of the curriculum allows for accommodations without isolating students, creating an inclusive classroom where all children learn alongside their peers.

A micro-school setting enhances this approach, offering small class sizes in a co-taught setting, personalized instruction, and strong teacher-student relationships. Montessori's mixed-age classrooms promote peer mentoring, collaboration, and social-emotional growth, reinforcing a supportive and inclusive learning environment. With built-in movement, self-regulation strategies, and teacher-guided observation rather than rigid assessments, this model ensures that students with disabilities receive tailored support while still benefiting from the independence and exploration central to Montessori education.

d. Course or Subject Overview

Our school will implement the Montessori curriculum, materials, and instructional methods as outlined above. The school will adhere exclusively to the Montessori framework, meaning no additional courses or subject offerings outside of this methodology will be included. While we do plan to create partnerships with our community to engage in physical activity, the arts, trips to the library- these partnerships are in addition to the Montessori curriculum and not a specific curricular program. An overview of the subject within each grade band is provided here:

In a Montessori primary classroom, children are naturally drawn to learning through hands-on exploration in a carefully prepared environment. At this stage, language development and sensory learning are deeply connected, so materials like textured sandpaper letters and the movable alphabet help build foundational writing skills. Similarly, a child's sensitivity to order supports early numeracy, with wooden rods and golden beads introducing number concepts before transitioning to place value, addition, and multiplication through structured bead work. Montessori's absorbent mind philosophy ensures learning happens naturally, allowing children to grasp abstract concepts through concrete experiences. The curriculum covers Practical Life, Sensorial, Geography/Science, Language, and Mathematics, aligning with Common Core State Standards (CCSS) while honoring each child's developmental stage and intrinsic motivation to learn.

In a Montessori lower elementary classroom, learning is structured around Language Arts, Math, and Cultural Studies, with a focus on hands-on exploration and independent discovery. Language Arts is woven into daily activities, with students developing literacy through reading real literature, research, creative writing, and comprehension exercises. They build foundational skills in phonics, vocabulary, and grammar, engaging in literature groups, writing projects, and research activities to deepen their understanding.

Math instruction in the Montessori setting is highly tactile, utilizing materials like golden beads, stamp games, and checker board to help students grasp numerical concepts before transitioning to abstract problem-solving. They explore operations, fractions, decimals, measurement, and graphing through real-world applications. Cultural Studies introduces broad concepts such as history, geography, and science through The Great Lessons, which help students develop an understanding of time, evolution, and civilizations. Hands-on materials, research projects, and timelines make learning more concrete and interconnected.

In a Montessori upper elementary classroom, students build on these foundations with more advanced studies in language, mathematics, and cultural inquiry. They analyze sentence structure, word origins, and literary themes while participating in research projects, poetry analysis, and oral presentations. Mathematics expands to include algebraic thinking, exponents, percentages, and geometric theorems, continuing the Montessori practice of using manipulatives to bridge the gap between hands-on learning and abstract reasoning. In Cultural Studies, students revisit The Great Lessons with greater depth, exploring topics such as ancient civilizations, biology, geology, and U.S. history. The Montessori approach encourages self-paced learning, fostering critical thinking, independence, and a deep connection to the world.

e. Promotion and Graduation Policy

Our promotion policy aligns with our mission, where every child has access to the tools, resources, and support they need to thrive-through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Shared with families at the start of the year, our policy on student promotion will be viewed from a holistic approach- not solely academic growth. Teacher leaders will be mindful of social and emotional as well as cognitive development. Teacher Leaders will make a recommendation for each child's promotion, based upon many factors that include but are not limited to observational data, early literacy skills, Montessori and other formative and standardized assessments.

Teacher Leaders will be responsible for evaluating each child's readiness to advance to the next age group, ensuring they have demonstrated proficiency in language, math, and social-emotional development. Students with disabilities will be evaluated in compliance with their individualized education plans and annual goals. Most students are expected to master the Montessori curriculum within the three-year cycle, progressing naturally through hands-on learning.

For students at risk of retention, Teacher Leaders will identify concerns before the mid-year family conference, proactively informing families and collaborating to create a personalized improvement plan to support the child's continued growth.

WUNYCS is a proposed pre-k-6th grade program and therefore does not have High School requirements/course descriptions, as they are not applicable.

f. Programmatic Audits

The practice of self-study is central to the Montessori method, and as part of this approach, Teacher Leaders will conduct an annual programmatic audit at the end of each school year. With the support of the executive director, this audit will assess the academic, governance, operational, and financial health of WUNYCS, aligning with renewal benchmarks set by SUNY. The evaluation will focus on progress toward the School's Accountability Plan goals, feedback from the School's authorizer, and overall readiness for renewal. Based on the findings, Teacher Leaders will outline actionable steps to further align the school with its mission and accountability standards. This plan will be presented to the Board of Trustees, which will monitor progress through monthly updates and discussions.

Simultaneously, the Board of Trustees of Trustees will conduct an annual self-evaluation, generating an internal report with an action plan if changes are needed. If the audit identifies a need for a charter revision, WUNYCS will work in partnership with the SUNY Charter Schools Institute to secure approval. The programmatic audit will incorporate insights from ongoing academic and school culture data reviews, financial audits, governance assessments, and strategic planning cycles to shape the school's goals and key performance indicators for the following year.

Schedule of events:

September – Launch & Initial Data Collection

- Baseline Assessments & Classroom Observations Begin
    - Montessori observation protocols implemented for student progress tracking (TL's)
    - Initial academic and social-emotional learning (SEL) assessments conducted (TL's)
- School-Wide Culture & Climate Assessment
    - Surveys and feedback collected from students, families, and staff (TL with support of Executive Director)

October – First Data Checkpoint

- First Data Day (Every 6 Weeks)
    - Teacher Leaders review early academic progress and SEL trends
    - Adjustments made to support students who need interventions (TL's)
- Finance & Operations Checkpoint
    - Board of Trustees reviews early-year financial data and operational efficiency

November – Montessori Fidelity Review

- Montessori Implementation Walkthrough (possibility of outside consultant)
    - Classroom observations to ensure fidelity to Montessori materials and instruction

- First Family-Teacher Conferences (Beginning of year)
    - Share student progress and discuss individualized learning plans (TL's) or individualized education plans where applicable (TL's with support of Executive director)

December – Mid-Year Review & Strategy Planning

- Mid-Year School Effectiveness Review
    - Academic performance, classroom engagement, and SEL data reviewed (TL's with support of executive director)
    - Teacher Leaders refine strategies to support students at risk of falling behind (TL's and any special education support staff for example those providing direct services such as OT, PT, Speech, etc as necessary to be included)
- Board of Trustees Committee Updates (Finance, Academic, Governance)
    - Mid-year review of school-wide goals, budget, and governance practices

January – Second Data Checkpoint & Intervention Plans

- Second Data Day (Every 6 Weeks)
    - Identify students needing additional academic or SEL support (TL's)
    - Implement individual or small-group interventions (TL's)

February – Governance & Compliance Audit

- Mid-Year Board of Trustees Self-Assessment
    - Trustees review governance effectiveness and alignment with school mission
- Operations & Financial Audit Preparation
    - Review financial health and compliance with SUNY renewal benchmarks
- Second Family-teacher conferences
    - Share student progress and discuss individualized learning plans (TL's) or individualized education plans where applicable (TL's with support of Executive director) Flag any retention concerns.

March – Montessori Program Evaluation & School Walkthrough

- Annual Montessori Fidelity Walkthrough (possibility of outside consultant)
    - Assess classroom alignment with Montessori standards
- Community Engagement Review
    - Evaluate family involvement, student well-being, and school culture

April – Third Data Checkpoint & Strategic Adjustments

- Third Data Day (Every 6 Weeks)
    - Assess progress toward academic, SEL, and Montessori learning goals (TL's)
    - Adjust strategies for students not meeting benchmarks (TL's and any special education support staff for example those providing direct services such as OT,

PT, Speech, etc as necessary to be included)
- Board of Trustees Governance Review & Renewal Progress Check
    - Evaluate alignment with renewal requirements

May – End-of-Year Academic & SEL Assessment

- Final Student Assessments & Observations
    - Review progress in core Montessori curriculum areas (TL's)
    - Identify students needing additional support before summer (TL's)
- Final Family-Teacher Conferences (EOY)
    - Summarize student growth and transition plans (TL's with support of Executive director)

June – Year-End Programmatic Audit

- Comprehensive Data Review & School Effectiveness Report
    - Synthesize all collected data into an end-of-year dashBoard of Trustees (TL's with support of Executive director)
    - Present findings to the Board of Trustees of Trustees (TL's with support of Executive director)
- Board of Trustees Self-Evaluation & Strategic Planning for Next Year
    - Trustees assess governance and determine future priorities
- Staff Reflection & Summer Goal Setting
    - Teacher Leaders reflect on classroom successes and areas for growth
    - Executive director reflect on overall program successes and personal areas for growth

Each stage of WUNYCS's evaluation process will be supported by a customized data dashBoard of Trustees, tracking academic progress, school culture, financial health, and governance effectiveness. At the start of the school year, the dashBoard of Trustees will be finalized with key performance targets, allowing for real-time data comparisons. Student performance data will be disaggregated by subgroups, including students with disabilities, English Language Learners, and economically disadvantaged students, ensuring all learners' needs are continuously assessed. Teacher Leaders and Board of Trustees members will receive training on interpreting and utilizing this data, with refinements made throughout the year.

Aligned with the annual programmatic audit calendar, the financial audit will follow GAAP standards and be conducted by an external auditor, while a governance audit will assess leadership effectiveness with support from external consultants. Findings from these audits, along with ongoing academic and operational assessments, will be synthesized into a comprehensive end-of-year report, outlining school performance, challenges, and recommendations. These findings will be presented in multiple formats, ensuring transparency among the Board of Trustees, Teacher Leaders, Executive director, and any other staff staff members.

The programmatic audit will also form the basis of the annual report to the SUNY Charter Schools Institute and NYSED, ensuring compliance with Education Law §2857(2). This report will provide a comprehensive overview of the school's academic, financial, and operational performance, including student achievement data, budget allocations, student services, and progress on the Accountability Plan. This process ensures WUNYCS remains aligned with its charter goals while maintaining high standards for student success and institutional excellence.

SUNY Charter Schools Institute
The State University of New York

Accountability Plan Template
SUNY Authorized Charter Schools

For schools enrolling students in grades Kindergarten - 8

This Accountability Plan template for schools enrolling students in Kindergarten – 8th grades outlines to the required Accountability Plan goals and measures in place since 2013 and revised in 2018 to incorporate the state's ESSA accountability system.

Sections highlighted in yellow indicate where to insert information to complete the Accountability Plan. Some yellow highlighted sections provide space for the inclusion of additional academic or organizational goals and measures. It is not required that schools include additional goals. For further discussion, or for a detailed explanation of the goals and measures included in this template and required of all SUNY authorized charter schools, refer to the *Guidelines for Creating an Accountability Plan*, revised July, 2019.

Wildflower Upstate New York Charter School

Accountability Plan
for the Accountability Period 2026-TO 2031

ACADEMIC GOALS

GOAL I: ENGLISH LANGUAGE ARTS

Goal: Wildflower Upstate New York Charter School students will meet grade level expectations in English Language Arts.

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the state's English language arts exam for grades 3-8.

- Each year, the school's aggregate Performance Index[1] ("PI") on the state English language arts exam will meet that year's state Measure of Interim Progress ("MIP") set forth in the state's ESSA accountability system.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state English language arts exam will be greater than that of students in the same tested grades in the local school district.

- Each year, the school will exceed its predicted level of performance on the state English language arts exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for the enrollment of economically disadvantaged students among all public schools in New York State.

Growth Measure

[1] The method for calculating a school's Performance Index is detailed in the state's Revised State Template for the Consolidated State Plan, p 47. The state's Measures of Interim Progress are also found in the Consolidated State Plan, pp 206-210. The revised State Template for the Consolidated State Plan is found here: www.p12.nysed.gov/accountability/essa/documents/nys-essa-plan-final-1-16-2018.pdf

DRAFT

- Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in English language arts for all tested students in 4th – 8th grades will be above the target of 50.

GOAL II: MATHEMATICS

Goal: Wildflower Upstate New York Charter students will meet grade level expectations in mathematics.

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the New York State mathematics exam for grades 3-8.
- Each year, the school's aggregate PI on the state mathematics exam will meet that year's state MIP set forth in the state's ESSA accountability system.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state mathematics exam will be greater than that of students in the same tested grades in the local school district.
- Each year, the school will exceed its predicted level of performance on the state mathematics exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for the enrollment of economically disadvantaged students among all public schools in New York State.

Growth Measure

- Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in mathematics for all tested students in 4th – 8th grades will be above the target of 50.

DRAFT

GOAL III: SCIENCE

Goal: Wildflower Upstate New York Charter School students will meet grade level expectations in science.

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the New York State science exam.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state science exam will be greater than that of students in the same tested grades in the local school district.

GOAL IV: ESSA

Goal: The school will remain in good standing according to the state's ESSA accountability system.

Absolute Measure

- Under the state's ESSA accountability system, the school is in good standing: the state has not identified the school as being in need of comprehensive or targeted assistance.

GOAL V: OPTIONAL ACADEMIC GOAL(S)

Goal: Wildflower Upstate New York Charter School students with disabilities will make progress towards with IEP goals

- Each year, at least 80% of students enrolled with IEP's will either make progress towards or meet their individualized education plan goals within one academic year.

ORGANIZATIONAL AND OTHER NON-ACADEMIC GOALS

GOAL VI: OPTIONAL NON-ACADEMIC STUDENT GOAL(S)

Goal: Wildflower Upstate New York Charter School students will attend school regularly

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- Each year, the school will have an average daily student attendance rate of at least 95%

GOAL VIII: OPTIONAL ORGANIZATIONAL GOAL(S)

Goal: Wildflower Upstate New York Charter School students participate in the full Montessori grade band with which they've enrolled.

Each year, 90% of all students enrolled during the course of the year return the following September.

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R-07ac - Calendar and Schedules

a. School Calendar

WUNYCS will operate on a trimester schedule, with key academic periods at the beginning, middle, and end of the year. These trimesters reflect the periods in which we will hold family conferences throughout the calendar year (beginning, middle, and end). The first day of school will be September 8, marking the start of a phased-in transition period where students attend half-day sessions, either in the morning or afternoon. This approach is designed to help students—particularly those who have not previously attended school or experienced a Montessori prepared environment—become acclimated to the structure and routines of a Montessori classroom in a supportive, gradual manner. The first full day of school for all students will take place on Friday, September 11, 2026.

The academic year will conclude on June 28, 2026, aligning with Ballston Spa Central School District (BSCSD) to ensure consistency for families with children enrolled in both district and charter schools. WUNYCS will follow a 182-day academic calendar, providing approximately 1,092 hours of instruction based on a 7 hour school day (of which a 1 hour lunch/recess would not count towards instructional minutes). Montessori pedagogy includes two work cycles each of which are three hours in length, thus meeting requirements for elementary students in NY state. We will utilize BSCSD's 2026-2027 school calendar and Teacher Leaders in cooperation with the executive director will build our calendar off of theirs, ensuring emergency release days, holidays, conference days, etc are aligned for ease of families with children in both the local district schools and ours.

Key dates:

- September 7, 2026: Labor Day
- September 8-10, 2026: Phase in days (Students start with 2 half days either in AM or PM with the first full day September 11, 2026).
- September 11, 2026: First Day of Classes
- September 25, 2026: Staff Development Day for BSCSD/Professional Development Day for WUNYCS (No School for Students)
- October 12, 2026: Indigenous Peoples' Day (No School)
- October 23, 2026: Superintendent Conference Day BSCSD/Family Conferences for WUNYCS (No School for students)
- November 12, 2026: Emergency Release Day aligned with BSCSD
- November 11, 2026: Veterans Day (No School)
- November 25-27, 2026: Thanksgiving Recess
- December 23, 2026 - January 3, 2027: December Recess
- January 4, 2027: Classes Resume
- January 18, 2027: Martin Luther King Jr. Day (No School)
- January 26-28, 2027: Regents Testing Days for BSCSD, Full days for WUNYCS
- January 29: Regents Testing Days for BSCSD/Family Conferences for WUNYCS (No School for students)

- February 15-19, 2027: February Recess
- March 26 - April 2, 2027: April Recess
- April 9: Family Conferences for WUNYCS (No School for students)
- May 31, 2027: Memorial Day (No School)
- June 14-18, 2027: Regents Testing Days for BSHS, Full day for WUNYCS
- June 19, 2027: Juneteenth (No School)
- June 23-26, 2027: Regents Testing Days for BSHS, Full day for WUNYCS
- June 28, 2027: Last day of school

WUNYCS's Teacher Leaders are each empowered to develop and offer wraparound care before and after school and/or summer time/summer school programming based on the needs of their students and families. In our first year in operation, as we are a primary program, we will not offer summer programming. In future years, especially as we have students in older grades, we may offer and encourage summer school programming as a means to remediate learning in students who present need. Such programs will be developed after seeking advice from families and the Board of Trustees. Wildflower schools in other states offer summer enrichment programs, and WUNYCS will have the benefit of learning best practices from the broader ecosystem of Wildflower schools.

b. Sample Student Schedule

Primary Classroom (age 3-5):

A typical day in a Primary Montessori classroom is thoughtfully structured to balance independence, exploration, and guided learning, ensuring that each child receives the individualized support they need while developing a love for learning.

The day begins with a gentle arrival between 8:15-8:30 am, as students transition into the classroom. Children are greeted warmly by their teachers upon entry. Families and teacher leaders may engage in a brief exchange regarding the morning and what to expect for the day if any new exciting things to share may arise. Students work independently with the support from their families, other students, or occasionally teacher leaders to hang up their belongings and settle into the peaceful, prepared environment. After the majority of students have arrived, a short morning gathering may include a song, a story, or a mindfulness exercise to ground the group and set the tone for the day. At this point, a new work may be introduced to the group at appropriate times as well. Once everyone is settled, the morning work period begins.

Following this, students move into the uninterrupted work period, a hallmark of the Montessori method. This spans a significant portion of the morning- a three hour work period, allowing children to choose activities that align with their developmental needs and interests. Some may work with practical life materials—pouring, sorting, or preparing food—while others engage in sensorial experiences such as tracing sandpaper letters or building with geometric solids. Math lessons might involve golden bead work to understand place value, while language development activities include moveable alphabets for word-building. Throughout this period,

teacher leaders observe, guide, and present new lessons based on each child's progress. One on one or small group lessons may occur with teacher leaders, as a means to perform diagnostic or formative assessments of students previous understanding of lessons. During this time both core academic as well as remedial efforts are occurring. In an effort to remain inclusive by nature of our school design, the morning work cycle will also involve dedicated time to progress notes dedicated to students IEP goal tracking as their IEP outlines. Students may also receive services in the classroom during the morning or afternoon work cycle, pending they do not require privacy for said service, to create awareness and empathy around everyone's abilities and various needs in our space.

As the morning unfolds, pending the school location aligns for this practice- students may engage in outdoor play, reinforcing their gross motor development, collaboration, and connection to nature. Around 11:30, students are reminded of transition times by teacher leaders, and the classroom then regathers for lunch time. Independence is encouraged in authentic Montessori classrooms, as students set tables, serve themselves, and clean up their spaces, fostering responsibility and self-sufficiency. Students have the choice of sitting wherever they want and cleaning up whenever they feel they've finished. There are no strict time limits and students have the choice of going back to work as they finish eating, although they are gently encouraged to finish up as the lunch period ends, as roughly 30 minutes is set aside for lunch time.

After lunch, the afternoon continues with rest or quiet time, where younger children nap and older children engage in independent reading, puzzles, or quiet creative activities. In a mixed age classroom, empathy is fostered through older students' ability to recognize that younger students may still require naps. The work cycle resumes, offering additional time for exploration, small-group lessons, or hands-on projects. This may include art, science, or cultural studies, expanding students' understanding of the world through storytelling, music, and experiments. Again, teacher leaders are observing and taking notes on student progress. They may interject and/or pull students aside for individualized practice, assessment, or small group remediation at this time. This is also a time wherein older students may receive more targeted support aligned with New York State standards, since some younger students may still be resting and older students can have uninterrupted more quiet time with a teacher leader.

The day concludes with community time, where students gather to reflect on their experiences, share insights, or celebrate achievements. A brief closing activity, such as a group song or gratitude circle, helps transition students into the end of the day. The end of the day is approximately 3:30pm. As children prepare for dismissal, tidying their materials and saying goodbye, they are ready to carry their learning and discoveries into their homes and beyond. Wildflower Schools blur the lines between home and school, so part of dismissal would also include brief exchanges as children are picked up to share stories of how each individual student's day went.

Elementary classroom (Lower Elementary (1-3rd grade)/Upper Elementary (3rd-6th grade)):

A typical day in an Elementary Montessori classroom is designed to foster independence, curiosity, and collaboration while providing structured yet flexible opportunities for academic and social growth. The multi-age environment allows children to learn at their own pace while engaging with peers in meaningful ways.

The day begins with a calm and welcoming arrival as students enter the classroom, greet their teachers and peers, and settle into the prepared environment. After putting away their belongings, they take a moment for quiet reflection, journal writing, or reading while everyone arrives. A short morning gathering follows, where students come together to discuss the day's schedule, share thoughts, and set intentions. This meeting may include a lesson on grace and courtesy, a cultural story that may be relevant to an upcoming time of year, or a discussion of current events relevant to their studies.

Students then transition into the uninterrupted morning work cycle, lasting three hours. This is the heart of the Montessori experience, where children engage in self-directed learning, choosing activities from various areas of the classroom, including language, mathematics, cultural studies, and science. Some may work independently, while others collaborate in small groups. A child might explore fractions using Montessori fraction circles, write a research report on biomes, or practice sentence analysis with grammar symbols. Teacher leaders move through the room, taking observational notes, and giving individualized lessons based on each student's needs and progress, guiding them toward deeper understanding. During this time, teacher leaders may also utilize the work period to pull individual students in order to introduce new lessons one on one, remediate former lessons as needed, or work towards students IEP goals.

Outdoor Exploration & Lunch

After the morning work period, pending the location allows it, students transition to outdoor play, an essential component of Montessori education. They engage in free movement, games, and social interactions, helping develop gross motor skills and build friendships. Afterwards, lunch is a community experience, where students practice independence by setting up, serving themselves, and cleaning up. This time encourages social bonding, polite conversation, and responsibility for their environment.

Afternoon Learning & Exploration

The afternoon work period is often a time for project-based learning, cultural studies, and science investigations. Students might gather for a group lesson, or continue morning work either individually or in small groups. Often in this age group, students may be working toward student-led research and projects. Art, music, and movement are also woven into the afternoon, providing students with creative expression opportunities. Practical life activities, such as gardening or cooking, are also choices students may partake in, reinforcing real-world skills and independence.

Closing the Day

As the day winds down, students participate in classroom contributions, ensuring their space is clean and ready for the next day. They may reflect on their work, share discoveries, or discuss upcoming projects. A closing circle brings the group together for a final story, song, or gratitude practice before dismissal. Each day in a Lower/Upper Elementary Montessori classroom is a dynamic balance of structured lessons, self-directed exploration, and meaningful social engagement, fostering independence, curiosity, and a lifelong love of learning.

Total instructional minutes in a typical week (aside from lunch/recess)
7 hour school day across 5 day school week 6 hours dedicated to instructional minutes (dependent on whether or not primary age students still nap/rest, this number fluctuates for 3-4 year olds)
Total weekly instructional minutes: 1,800

Sample student schedule in a typical week (schedule may vary based on average age)

Time	**Activity**
8:15-8:30	Arrival/Morning meeting
8:30-11:30	Morning work cycle
11:30-12	Recess outside, location/weather permitting
12-12:30	Lunch/clean-up
12:30-3:15	Age dependent: Nap (some primary students)/Afternoon work period (primary/elementary)
3:15-3:30	Classroom contributions (clean up) and closing meeting
3:30	Dismissal

c. Sample Teacher Schedule

Teacher Leaders serve as both educators and administrators, balancing their teaching responsibilities with school management duties. Their daily schedule reflects this dual role, with time allocated for both instructional and leadership tasks. The example schedule below provides a general framework, though specific times may vary based on site design and classroom level. Additionally, WUNYCS will utilize a co-taught model with one Montessori credentialed teacher and an assistant, thus two schedules are provided

(Montessorian-teacher leader 1, Teacher's Assistant- teacher leader 2). Our teacher leaders' work day begins at 7:45am and ends at 3:45pm.

Note on Terminology and Roles in the Classroom

In this section, we refer to both educators in the classroom as *Teacher Leaders*. While one of these roles is budgeted as a traditional assistant position, we intentionally use shared language to reflect our belief that both individuals play an equally vital role in the learning environment. We hope that this framing encourages mutual respect, shared ownership, and the possibility for the educator in the assistant role to see a future path toward becoming a Teacher Leader, as understood within the Wildflower Foundation framework (credentialed Montessori Teacher, and/or Certified NYS teacher).

At WUNYCS, we recognize the importance of a well-supported teaching team. Each classroom will have a dedicated teacher's assistant to provide essential support throughout the day. This model ensures that educators can take necessary breaks, maintain a balanced workload, and engage in collaborative planning to enhance instruction. By fostering a co-teaching environment, our assistants help uphold the integrity of our Montessori approach while contributing to a dynamic and responsive learning experience for all students. Some of the following schedules may fluctuate depending upon the teacher assistant role as determined with the Montessori teacher and executive director.

Time	**Teacher Leader 1 (Montessorian)**	**Teacher Leader 2 (Teacher's Assistant)**
7:45	Teachers arrival	Teachers arrival
7:45-8:15	Ensure environment prepared, check in with one another on prior day/upcoming day	Ensure environment prepared, check in with one another on prior day/upcoming day
8:15-8:30	Arrival Greet students and families at entry Take Attendance	Arrival Greet students in classroom Lead morning meeting once majority of students arrive
8:30-11:30	Morning work cycle Guide students, observations, individualized lessons	Morning work cycle Guide students, observations, individualized lessons
11:30-12	Recess outside, location/weather permitting	Lunch break
12-12:30	Lunch break	Lunch/clean-up with students

12:30-3:15	Planning period/administrative tasks/Observe afternoon work period/Individualized lessons	Age dependent: Nap (some primary students)/Afternoon work period (primary/elementary)/Observe/Offer guidance during work period
3:15-3:30	Planning period/administrative tasks	Prepare students for dismissal: Lead closing meeting
3:30	Dismissal: greet families at entry	Dismissal: begin preparing the classroom environment for tomorrow
3:30-3:45	Afternoon check in/co-planning for next day, ensure classroom environment prepared for following day	Afternoon check in/co-planning for next day, ensure classroom environment prepared for following day

As seen in the table, a Teacher Leader's day begins with self-awareness and mindfulness before students arrive. Taking time to check in as co-teachers before children arrive—allows them to approach the day with clarity. By understanding their own values, strengths, and areas for growth, they can foster meaningful connections with students, supporting both their emotional and academic development. Teacher leaders work as a united team so the 30 minute period before students arrive each day as well as the final 15 minutes before they close out the day must be held sacred to prepare for the upcoming day.

Before the students enter, the Teacher Leader prepares the classroom environment to promote independence, self-regulation, and mutual respect. This will have likely been done prior to leaving as well, but part of the 30 minute check in involves any last steps to prepare the environment. As long as the environment is prepared, they may discuss the day's lesson plans and any student observations that need attention. As students arrive, each child is warmly greeted by one of the Teacher Leaders at the door, forging relationships with both the student and their families, setting a positive tone for the day. While this is happening, the second Teacher Leader is greeting students within the classroom, inviting them to prepare for the day by putting away their belongings from home and joining for morning meetings. The class then gathers for a community meeting, where students may participate in a range of events. They may hear a story, learn about a new work through a group lesson, sing a song, or discuss upcoming events. Perhaps it's a special day where a student is participating in their birthday walk, a Montessori classroom tradition where a student and their family members are invited to participate in a birthday celebration.

After this, students begin their first morning work cycle. During the uninterrupted work period, students choose activities that align with their interests and developmental needs. The Teacher Leaders will both observe, provide individual or small group lessons, and ensure productive engagement. Later, you may hear the sound of chimes-signalling transition to recess

is about to begin. The transition to recess/lunch is modeled with calmness and purpose, reinforcing expected behaviors. Teachers may work to relieve each other for their personal lunch break during this next hour of the day. After recess and lunch concludes. The afternoon work period includes further lessons, observations, and administrative tasks. Throughout the day, both formal and informal observations guide instructional decisions, helping to create an environment tailored to each child's growth. It is during the afternoon work cycle that one of the two teachers may take a longer break to complete administrative tasks, prepare upcoming lessons, review student work samples for their portfolios, or even develop work aligned to students IEP goals. Teacher Leaders will work together to determine whether this rotation is a daily/weekly rotation, dependent upon student and teacher needs. It will ultimately be up to the Teacher Leaders to determine the finalized daily schedule which will ultimately depend on student needs in the classroom. In Montessori classrooms, learning is child-led rather than teacher-directed, which allows students to follow their natural interests and developmental rhythms. As a result, they are not bound to a rigid, minute-by-minute schedule. Instead, they act as guides—observing, supporting, and facilitating individualized learning experiences based on each child's readiness and curiosity. While the table provides general guidelines for periods of the day, Montessori classrooms offer flexible structure and foster deeper engagement, sustained concentration, and greater autonomy, while still ensuring that academic standards and developmental milestones are thoughtfully addressed.

As the day ends, students and Teacher Leaders work together to restore the classroom. While one teacher begins to prepare the environment for the following day/encourages classroom contributions (class clean up) the second Teacher Leader reflects, communicates with families at the doorway for pick up/dismissal, and prepares for the next day. Regular professional development and planning time are integrated into the schedule to ensure ongoing growth and collaboration among educators. Once the children are dismissed, Teacher Leaders do a 'check-out' before leaving for the day, to ensure the environment is prepared for tomorrow and discuss any pertinent/necessary notes from observations throughout the day.

Teacher Leaders may utilize time during the 12:30-3:30 afternoon work period to co-observe students, analyze ongoing assessments, compare findings, or prepare upcoming lessons. Co-planning is an essential part of a co-taught model. In a Montessori setting, the role of co-teachers is essential to fostering a collaborative, student-centered learning environment. By working together, co-teachers can provide individualized instruction, seamlessly support student needs, and model respectful collaboration for their students. This partnership allows for deeper observation, ongoing assessment, and the flexibility to adapt lessons to each child's unique learning journey. The co-teaching model also ensures that the classroom remains a dynamic and well-prepared space, where students receive consistent guidance and encouragement. At WUNYCS, we believe that co-teaching is not just beneficial—it is fundamental to creating a nurturing, inclusive, and effective Montessori learning experience.

The two adults in the space will work together within a co-teaching framework, supporting one another in real time and drawing on each other's strengths. This collaborative approach is foundational to creating a classroom culture rooted in mutual respect, shared

decision-making, and continuous learning, so that all students receive the necessary support they need to thrive.

R-08ad - Specific Populations

a. Struggling Students

Montessori teachers undergo extensive training to deeply understand child development, including both typical and atypical growth patterns. Additionally, WUNYCS plans to hire both a Montessori teacher and teachers assistant in each classroom.. Montessori classrooms naturally emphasize individualized learning, and the addition of a second adult in each prepared environment lends itself to more individualized attention. Both teacher leaders in this scenario are trained observers. They regularly document student progress to assess learning needs and provide individualized support. Through careful daily observations, they track students' strengths, challenges, and overall learning trajectories, adjusting instruction as needed.

Teacher Leaders use these observations to tailor lessons, combining Montessori curriculum with students' demonstrated needs. After a lesson, they monitor students' independent practice and provide additional guidance if necessary. At WUNYCS, the term "struggling student" is defined by a child who repeatedly faces challenges with a skill despite various instructional approaches and adaptations. In such cases, the Teacher Leaders collaborate with each other to determine appropriate interventions and additional support strategies.

WUNYCS will implement the Multi-Tiered System of Supports (MTSS) framework alongside the Response to Intervention (RTI) process as a proactive approach to identifying, monitoring, and supporting student progress both academically and emotionally throughout the school year. This framework will be integrated with the Montessori Child Study Protocol[47]. While MTSS provides a structured, evidence-based system to address the diverse needs of all students, the Child Study Protocol serves as a guide for implementing MTSS effectively. This includes organizing Child Study Team (CST) meetings, identifying specific skill gaps affecting a child's academic or social-emotional growth, developing targeted interventions, monitoring progress through observation and data collection, and reassessing effectiveness over a set period. Through this combined approach, WUNYCS ensures continuous, individualized support for student success. This tiered approach helps to determine which students may be identified as "struggling" and forge a plan to mitigate potential barriers to learning.

Within the MTSS model, WUNYCS will utilize a Response to Intervention (RtI) model to ensure early identification and support for students with academic and/or behavioral needs. This multi-tiered approach begins with high-quality general education instruction. Students who

[47] American Montessori Society. (n.d.). *Child study: A Montessori-based approach to tiered systems of support*. Retrieved March 31, 2025, from https://learn.amshq.org/products/child-study-a-montessori-based-approach-to-tiered-systems-of-support

require additional support receive targeted interventions, delivered by Teacher Leaders, special educators, and specialists dependent upon Teacher Leaders findings. Progress is closely monitored, and instructional decisions are guided by student response data, ensuring a well-integrated system of instruction and support tailored to each child's unique learning journey. Children may move through a series of tiers based upon their individual needs. For example, in tier one, Teacher Leaders may meet and discuss the following: Who is showing signs of difficulty? What obstacles are in the way of healthy development? What modifications can be made to remove obstacles? How will we monitor progress? The answers to these questions allow Teacher Leaders to determine which tier students may fall into moving forward in the RtI process, which is broken into three tiers.

Tier 1: Universal Support

Around 80% of students thrive in the general classroom environment, where their academic and behavioral needs are met through the Montessori curriculum. This approach integrates standards-based learning with differentiated instruction in a co-teaching model. As students engage in both group and independent follow-up work, teachers personalize instruction to match individual learning styles and educational needs. Students who are observed to be 'struggling,' may be moved to Tier 2 for additional targeted support.

Tier 2: Targeted Support

This tier serves approximately 5-15% of students who require more focused interventions to support their academic and behavioral progress. These students receive targeted strategies recommended by the Child Study Team (CST)- which may consist of further support outside of the two Teacher Leaders in the class. This may require assistance from the executive direction, as Courtney Murphy (lead applicant) is certified to teach students with disabilities in NY state, as well as potential Board member expertise (as one of our board members is certified to teach students with disabilities, and another is ENL certified, able to determine if there is a language barrier in place). As needed, teacher leaders may discuss with the executive director if outside consultants are required.

In tier two, plans are made to accommodate and modify potential assignments, and determine if these accommodations and modifications assist in the student reaching proficiency in a standard/skill. This may include modified assignments, copies of teachers' set of notes, or frequent individual check-ins for understanding. If a student does not show adequate progress with Tier 2 interventions, a more intensive support plan is developed to meet their needs.

Tier 3: Intensive Support

About 5% of students require the most intensive level of intervention due to significant academic challenges. These students receive individualized, highly structured support to help them reach their learning goals. Once sufficient progress is made, they may transition back to Tier 2 support. If students continue to struggle despite intensive interventions, they are referred to the special education team for further evaluation to assess potential learning disabilities, mental health concerns, trauma, or changes in their home environment.

Throughout this entire process, WUNYCS will remain in consistent communication with

students' families. This includes proactively discussing movement through the RtI system, so families are well aware in advance of any potential needs for their child, and a collaborative approach may be made between home and school. Additionally, if at any point in an RTI process families feel as though their child may need an evaluation to determine eligibility for special education services, IDEA allows parents to request a formal evaluation occur. RtI will not deny or delay any evaluation requested by the family.

Our program at WUNYCS is deeply rooted in Montessori principles, fostering a student-centered, inclusive environment where every child experiences a sense of belonging. The school is dedicated to providing a continuum of services in the least restrictive environment, ensuring that inclusion is a natural and necessary component of the learning experience for both students with and without additional support needs. The microschool model and multi-age classroom structure create a dynamic and adaptable learning environment. Small group and individualized instruction allow each student to work at their own pace, with Teacher Leaders continually adjusting instruction based on progress monitoring and Montessori observation protocols. This flexible approach prevents students from being placed in rigid ability groups and instead fosters fluid movement between learning activities. For instance, a student excelling in reading may join older peers for literacy activities, while receiving additional support in math with younger students, ensuring personalized instruction tailored to each child's mastery level. This structure nurtures a community of learners where students support one another and engage in developmentally appropriate, self-paced learning guided by their Teacher Leaders.

Within the Wildflower microschool model and the Montessori classroom environment, students experience differentiated learning tailored to their unique needs. This approach affirms diverse learning styles, ensuring each child progresses at their own pace. Small groups and individualized instruction allow Teacher Leaders to adapt lessons to each student's level of mastery. Once a student demonstrates readiness to move forward, the teacher shifts focus to another student or group, maintaining a personalized learning experience. Instruction is informed by Montessori observation protocols, assessments, and progress monitoring tools. As needed, Teacher Leaders may administer other benchmark assessments or screeners throughout the year as outlined in our curriculum and assessment proposal. Through these resources and personnel, we ensure to assist “struggling students,” and ensure all students receive necessary supports to thrive.

Furthermore, the microschool model and multi-age classroom structure create a dynamic, student-centered learning environment where both teachers and students engage in continuous, flexible learning. A student excelling in reading, for instance, may join older peers for literacy activities, while receiving additional math support with younger students. This fluid grouping strategy prevents rigid ability-based tracking, ensuring students are consistently placed in learning experiences that match their developmental progress. Through this approach, students benefit from a more responsive, individualized educational experience, where they are supported in their strengths and guided in areas where they need further development.

Our choice in utilizing Montessori curriculum aligns with our mission of supporting all students, including those deemed 'struggling' as defined previously. With a child-centered individualized approach to teaching and learning, WUNYCS enables teachers to identify and address student learning gaps effectively. Montessori materials also offer flexibility, allowing for reinforcement and repetition through various hands-on methods. Many materials are self-correcting, meaning students can independently recognize and correct their errors. Teacher Leaders closely observe this process, encouraging self-correction and adaptation as students work through activities.

New York State's Multi-Tiered System of Supports (MTSS)[48] framework is designed to provide a comprehensive, evidence-based approach to meet the diverse needs of all students. The essential components of this framework include:

1.High-Quality Instruction: Delivering rigorous, standards-based instruction that is culturally and linguistically responsive, ensuring equitable access to learning for every student.
Co-teachers who are strong with their delivery of Montessori curriculum which aligns to NYS standards are the first aspect of the MTSS framework. A strong teacher who is well versed in their general education curriculum is often an overlooked step regarding MTSS.

2. Screening: Conducting universal screenings multiple times a year to identify students who may be at risk for academic, social-emotional, or behavioral challenges, allowing for early intervention. WUNYCS will utilize BDI-3 and DIBELS for these purposes, able to screen early and throughout the year to deduce progress.

3. Progress Monitoring: Regularly assessing student performance to evaluate the effectiveness of instruction and interventions, ensuring that support strategies are responsive to each student's needs. The Montessori pedagogy lends itself to this daily scientific observation practice. Montessori credentialed staff as well as early childhood education teachers engage in this practice regularly.

4. Data-Based Decision Making: Utilizing data from assessments and observations to inform instructional decisions, allocate resources, and adjust interventions to enhance student outcomes. Teacher Leaders will meet to discuss student progress and movement throughout the fluid RtI framework, determining which tier students may currently be in.

5. Multi-Level Prevention System: Implementing a continuum of support that includes:

- **Tier 1**: Universal interventions for all students. In our inclusive classroom model,

[48] New York State Education Department. (n.d.). *Multi-Tiered System of Supports (MTSS)*. Retrieved March 31, 2025, from https://www.nysed.gov/innovation-school-reform/multi-tiered-system-supports-mtss

WUNYCS will work to ensure students' English language acquisition is part of the discussion when evaluating during Tier 1.

- **Tier 2**: Targeted interventions for students requiring additional support.
- **Tier 3**: Intensive, individualized interventions for students with significant needs.

6. Family, School, and Community Partnering: Engaging families and community members as active partners in the educational process to support student learning and well-being. As mentioned previously, families will be well aware of their rights within regards to IDEA, and requesting further evaluations for a potential need for special education. They will also be aware of ongoing assessment data and scores to keep to our commitment of blurring the lines between home and school. Families and Teacher leaders will form a united front in supporting children of WUNYCS.

7. Culturally Responsive-Sustaining Education: Creating inclusive learning environments that respect and affirm diverse cultural backgrounds, promoting equity and belonging for all students. Our inclusive model ensures all students at WUNYCS receive the support they need to thrive and feel a sense of belonging in our school and community.

By integrating these components, New York State's MTSS framework aims to support the academic, behavioral, and social-emotional development of every student, ensuring they have the resources and opportunities to succeed. At WUNYCS, we are committed to evaluating the effectiveness of our Montessori program to ensure we are meeting the diverse needs of our students, as our mission and vision is an inclusive model. Our assessment approach is deeply rooted in Montessori principles, emphasizing observation, individualized learning progress, and a whole-child approach to development. To ensure the effectiveness of instruction and meet student needs, Teacher Leaders continuously assess student progress through observation and informal mastery checks. This includes one-on-one interactions, reviewing completed work, engaging students in explaining their reasoning, or guiding them through an activity again while offering direct support. The Montessori learning environment is designed to be supportive, fostering student confidence and prioritizing critical thinking and deep understanding. As needed, Teacher Leaders may utilize support from the executive director, Board, and or other outside consultants when and if they believe a student may require an evaluation for special education services. It is through extensive data collection that these choices may be made.

Teacher Leaders engage in ongoing observation and documentation, carefully tracking student growth through Montessori-aligned tools such as Transparent Classroom. Instead of relying solely on traditional assessments, we will use student portfolios, work samples, and rubrics that measure academic progress, social-emotional growth, and executive functioning. By closely monitoring how students engage with hands-on materials, collaborate with peers, and

develop independence, we gain valuable insight into their learning trajectory. Teacher Leaders will collaborate with each other to assess the efficacy of their data tracking, and student work samples aligned with state standards- to determine mastery.

For students requiring additional support, we implement a structured Child Study Protocol within the Multi-Tiered System of Support (MTSS), ensuring early identification and intervention. Regular team meetings allow educators to discuss student progress, refine instructional strategies, and ensure that all students receive the appropriate level of guidance. Additionally, we actively incorporate family engagement through parent-teacher conferences and surveys, valuing their input in shaping a well-rounded educational experience. Lastly, we will involve support from the executive director as well as the Board, consulting with the academic excellence committee as necessary to develop appropriate next steps in supporting "struggling" students.

To maintain program fidelity, we conduct annual programmatic reviews, aligning our instructional practices with Montessori accreditation standards while incorporating data-driven decision-making. Through ongoing professional development, peer collaboration, and community feedback, we ensure that WUNYCS remains a high-quality, inclusive Montessori learning environment that nurtures every child's potential.

b. Students with Disabilities

WUNYCS will abide by all of the special education assurances as mandated by SUNY Charter Schools Institute. A brief overview is provided here for reference:

WUNYCS is committed to fully complying with all federal and state laws regarding the education of students with disabilities. The school will adhere to the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act, and Title II of the Americans with Disabilities Act (ADA). These laws ensure that all qualifying students receive a free and appropriate public education (FAPE), are appropriately evaluated, have access to an Individualized Education Program (IEP), and are educated in the least restrictive environment (LRE). The school will also support parental involvement in IEP development and provide access to procedures for resolving disputes about the provision of FAPE.

To ensure the effective implementation of special education services, WUNYCS will employ a certified special education coordinator responsible for liaising with local Committees on Special Education (CSEs). This individual will verify which students have IEPs, ensure the delivery of services as outlined in the IEPs, and maintain compliance with all applicable regulations. The coordinator may assume additional administrative responsibilities as long as they do not interfere with special education compliance. The school will also make regular and special education teachers available for CSE meetings and ensure these educators have access to students' IEPs. Parents of students with disabilities will be kept informed about their children's progress toward IEP goals as frequently as parents of general education students.

In accordance with FERPA and IDEA, WUNYCS will maintain secure student records and safeguard student privacy. The school will not act as its own CSE or conduct evaluations or due process hearings—these functions will remain under the jurisdiction of the student's district of residence. The school will also comply with the Child Find mandate, ensuring that students who may require special education services are identified and referred appropriately. Lastly, school personnel will participate in any required training and technical assistance offered by SUNY or the New York State Education Department to ensure high-quality service and compliance with all regulations.

Under Education Law § 2856(1), the Ballston Spa Central School district will serve as the Local Educational Agency (LEA) and is responsible for applying for federal IDEA funds for special education services provided to resident students enrolled in our school (WUNYCS). The district must sub-allocate IDEA funds (Sections 611 and 619) to the charter school in proportion to the level of services rendered (Education Law § 4410-b(4); Commissioner's Regulations § 119.1(b)(9) and (d)). Additionally, per Education Law § 2853(4), charter school students must receive special education services as outlined in their Individualized Education Program (IEP), as determined by the Committee on Special Education (CSE) or subcommittee of the school district of residence. For IDEA purposes, WUNYCS is considered part of the Ballston Spa Central School District and must ensure compliance with federal and state special education mandates.

Relationship between CSE and WUNYCS

Under Education Law § 2853(4)(a), Ballston Spa CSD will serve as the Local Educational Agency (LEA) under IDEA and as such is responsible for the evaluation, identification, placement, and IEP development for WUNYCS's students through its Committee on Special Education (CSE). Education Law §§ 2853(4) and 2851(2)(s) require charter schools to implement IEPs in full compliance with all federal laws and regulations governing students with disabilities.

Our mission and vision at WUNYCS promote inclusion, and as such we will form a positive relationship with our home district and abide by all special education assurances found in Appendix B of this RFP. It is by doing so that we service our students and their families at the level of support they are legally entitled to. Wildflower Teacher Leaders with the support of the Executive Director (a certified special education teacher in New York state) will play a vital role in the development of Individualized Education Programs (IEPs) for our students. To ensure appropriate services and compliance with Education Law, our staff will actively participate in Committee on Special Education (CSE) meetings related to Wildflower students. If and when a student is enrolled who requires co-teaching or push-in services, we will hire a special education teacher who would play a role in writing the IEP as well. Not all students with IEP's have this programming, so our executive director will support early on. The micro-school model lends itself well to ongoing collaboration between teacher leaders, support staff, and the executive director, to ensure all students receive their mandated services.

For students who are enrolled but have not yet begun attending WUNYCS, coordination between our school and BSCSD will ensure that a representative of our school (Teacher Leader) is present at the CSE meeting. Again, if a student has co-teaching services, this representative

would be the special education teacher. Parents and the district retain the right to invite charter school staff as individuals with knowledge or expertise regarding the student's needs. Once a student is actively attending Wildflower, a designated general education teacher will serve as the regular education teacher member of the CSE. If all special education services are provided directly by Wildflower or through contractual agreements, a special education provider from the school will serve as the special education teacher member of the CSE. In cases where both the district and Wildflower share responsibility for special education services, the district will assign the most appropriate provider for this role. Wildflower is committed to full cooperation with the district throughout this process, ensuring that staff actively participate in CSE meetings. This collaborative effort is crucial in making sure students with disabilities receive the appropriate services and support as outlined in their IEPs to foster their academic success.

Child Find and RTI

If and when students move through various tiers within our MTSS framework, they may in fact reach tier 3 requiring significant support. If at any point it is suspected that a child may require further evaluation, for example, if challenges persist despite intensive support, the special education teacher initiates a formal referral to the Committee on Special Education (CSE) for evaluation and potential special education eligibility determination.

At WUNYCS, the referral process for special education evaluations follows established legal guidelines to ensure compliance with Child Find requirements. Based on classroom observations and assessment data, the Montessori and special education teachers will collaborate to submit a written request for an initial evaluation to the Committee on Special Education (CSE) Chairperson. This request will clearly identify the student's challenges within the classroom setting, document Tier 1 and Tier 2 interventions and supports that have already been implemented, and detail the extent of parental involvement prior to the referral.

WUNYCS will also support and guide parents who wish to initiate a referral for their child's CSE evaluation. Parents will be provided with procedural safeguards and a sample letter outlining the necessary components for submitting a referral request. If a parent requests assistance, the school will draft the referral on their behalf and secure their signature to ensure proper submission.

WUNYCS affirms its commitment to Child Find and will fully comply with all legal obligations to identify, evaluate, and support students with disabilities in accordance with state and federal regulations. When a student is identified as having a disability, WUNYCS will collaborate with the CSE to ensure full compliance with all applicable laws and regulations regarding the provision of special education services. This includes conducting regular IEP reviews to monitor student progress toward their established goals.

If a review indicates that the IEP no longer aligns with the student's needs, a teacher leader or executive director will coordinate with the CSE to reassess, modify, or update the plan to provide the most effective support. Any findings, recommendations, or changes in

intervention strategies will be communicated clearly to the student's family, ensuring transparency and collaboration in the decision-making process.

If a student does not qualify for special education services under the Individuals with Disabilities Education Act (IDEA), they may still be eligible for support under Section 504 of the Rehabilitation Act of 1973. WUNYCS will ensure that students with disabilities who do not meet IDEA criteria receive appropriate educational services through a Section 504 plan. The school will provide a Free Appropriate Public Education (FAPE), which includes regular or special education and necessary aids and services designed to meet the student's individual needs. These supports will ensure students with disabilities have equal access to education, comparable to their non-disabled peers.

Resources and Personnel

WUNYCS is committed to providing a fully inclusive, child-centered Montessori learning environment that supports the diverse needs of all students, including those with disabilities. The school will implement a co-teaching model in each classroom, where two adults in each space work together to deliver individualized instruction that aligns with both Montessori pedagogy and New York State learning standards.

To ensure compliance with special education laws and best practices, the Executive Director, a certified special education teacher, will provide administrative oversight, assist with compliance-related tasks, and work closely with the Committee on Special Education (CSE) to ensure students receive services in accordance with their Individualized Education Programs (IEPs). If applicable, an early childhood special education teacher will provide any services related to direct teaching through the students IEP (examples including consultant teaching, co-teaching, etc). This proactive model lends itself to natural differentiation, real-time interventions, and a responsive learning environment tailored to each student's needs. A co-teaching approach ensures that all students, including those with disabilities, receive individualized support while remaining fully integrated into the classroom community.

Depending upon services students require, the addition of a special education teacher may be necessary. If so, they will provide targeted interventions based on each student's Individualized Education Program (IEP). These services will be delivered through a push-in model, where the special education teacher supports students directly within the classroom setting. Only when absolutely necessary would the special education teacher utilize a pull-out model, where students receive specialized instruction in a separate setting when needed. Our goal is to provide services directly in the Montessori classroom, which fosters empathy from others and creates a harmonious environment where all students get individual attention, and especially those with IEP services receive them. By combining Montessori's hands-on, student-centered approach with evidence-based special education strategies, WUNYCS will ensure that every child has access to the tools, resources, and individualized instruction necessary for success.

WUNYCS is committed to providing a comprehensive network of direct and related

services to ensure all students receive the support they need to thrive. The school will partner with Ballston Spa Central School District as necessary for any services related to other IEP related services outside of teaching such as: working with licensed specialists to offer Speech-Language Therapy, Occupational Therapy (OT), Physical Therapy (PT), Counseling, Social-Emotional Support, and Behavioral Interventions. These services will be seamlessly integrated into the school environment to support student development while maintaining the principles of Montessori education.

To enhance instructional alignment and student progress monitoring, co-teaching teams will have dedicated planning time to collaborate, adapt lesson plans, and analyze student data. These may occur during the afternoon work cycle as a teacher assistant and substitute cover the class, and occur monthly at minimum. Final schedules of when co-planning will occur will be at the discretion of the Teacher Leaders, and the executive director may perform substitute duties as necessary to allow for this co-planning to occur. Co-planning, especially as it relates to students with disabilities, is a crucial time for educators to collaborate and work diligently to produce positive outcomes for their students. The Executive Director will strongly encourage that co-planning meetings occur at least once a month, if not more frequently.

Additionally, staff will engage in ongoing professional development focused on the following for a well rounded approach to supporting children holistically:

- Montessori methodology
- Differentiation
- Multi-Tiered Systems of Support (MTSS)
- trauma-informed practices
- culturally relevant pedagogy
- conscious discipline
- special education strategies/compliance.

These trainings will ensure that educators are well-equipped to meet the diverse needs of students.

The Montessori curriculum's multi-sensory, hands-on approach naturally supports varied learning styles, and assistive technology and adaptive materials will be available to enhance accessibility for all students. Wildflower will partner with Inclusive Saratoga (a non-profit dedicated to ensuring spaces allow all people with disabilities to fully participate) for a walkthrough of our classroom spaces to ensure we not only meet ADA compliance regulations, but that our materials in a typical Montessori setting are especially adaptable to meet the needs of students with disabilities. Conversations with Inclusive Saratoga have already begun, and they have offered us a letter of support.

Remote/Virtual Instruction

In the event that remote learning becomes necessary, WUNYCS will ensure that students entitled to related services continue to receive them through virtual platforms, teletherapy, and

individualized learning plans. Licensed specialists, including speech-language pathologists, occupational therapists, physical therapists, school psychologists, and behavioral specialists, will provide services remotely via secure video conferencing platforms, ensuring continuity of care and compliance with students' IEP requirements. The executive director as well as teacher leaders will collaborate with families to ensure they have access to devices which allow them to receive support virtually, as well as remain in communication to ensure these services are provided in alignment with the number of minutes per the students IEP.

If a student has special education services such as consultant teaching on their IEP, special education teachers will adapt the Montessori methodology for remote instruction, utilizing virtual small-group lessons, individualized check-ins, and home-based hands-on activities that align with student learning needs- to be delivered or picked up in a safe manner for at home use. Families will receive guidance, instructional materials, and technology support to help implement Montessori-inspired learning at home.

To maintain collaboration and progress monitoring, co-teaching teams will schedule regular check-ins with families, track student progress through digital platforms, and adjust learning plans as needed. Additionally, the school will provide training and support for parents to help them facilitate remote learning and ensure that students receive their legally entitled services, even in a virtual setting.

Inclusive Services/Settings

At WUNYCS, all required special education and related services will be provided on-site within the classroom setting whenever possible, ensuring students receive support in the least restrictive environment while maintaining full access to the Montessori curriculum. At WUNYCS, ensuring that students receive the necessary special education and related services not only supports their individual development but also fosters a culture of empathy and inclusion that aligns with our Montessori vision.

By integrating push-in support services within the classroom, students learn in a diverse, inclusive environment where they witness and engage with peers of varying abilities, fostering understanding, patience, and collaboration. The multi-age structure and individualized learning model naturally encourage peer mentorship, allowing students to support and learn from one another, reinforcing the values of community, respect, and equity. When students see that their peers receive support tailored to their needs—whether through speech therapy, occupational therapy, or differentiated instruction—they develop a deep appreciation for individual learning differences and recognize the importance of accessibility for all learners. This experience shapes compassionate, socially responsible individuals, which is central to our commitment to educational equity and holistic child development.

Our inclusive model will allow for seamless integration of push-in support services such as speech therapy, occupational therapy, and behavioral interventions within the learning environment. This approach prioritizes inclusion and natural differentiation while minimizing disruptions to student learning. In cases where the classroom space does not adequately

accommodate a particular service—such as physical therapy (PT) for example, which may require specialized equipment or additional space for movement-based interventions—services may be delivered in a dedicated separate space within the school. All related services will be delivered on-site at WUNYCS, either by BSCSD-employed specialists or through third-party providers, ensuring that students receive consistent, high-quality support within the school environment. We are committed to working closely with the Committee on Special Education (CSE) and families to ensure that all students receive their mandated services in a manner that best supports their individual needs.

If a student requires a 504 Plan, they will receive the accommodations outlined in their plan to maintain equal access to education. These supports may include extended test time, preferential seating during lessons, assistive technology, modified assignments, physical adaptations, behavioral interventions, counseling, or health-related services. Implementation of a 504 plan is, just like an IEP, a collaborative effort. Teacher leaders will integrate accommodations into instruction and hold each other accountable to compliance. The executive director will also hold teacher leaders accountable to compliance and documentation, as well as data collection efforts. Parents will be supported and learn the ways in which they can and should advocate for their child and monitor effectiveness, and if required, related service providers will deliver specialized support. At WUNYCS, 504 Plans are regularly reviewed to adjust for evolving student needs, ensuring they receive the support necessary to thrive alongside their peers.

Research Based Effectiveness

WUNYCS intentionally chose Montessori pedagogy as its model for our school because of its unique individualized attention for all students. As outlined further in the R-06af - Curriculum and Instruction section of this RFP, it is evident that Montessori curriculum not only aligns with NYS standards, but the pedagogy lends itself well to supporting individualized learning, especially those with disabilities. Dr. Maria Montessori's educational philosophy, initially developed through her work with children facing cognitive challenges, still supports diverse learners 100 years later. Additionally, MTSS is a research based approach that relies on data collection to improve student outcomes, much like Montessori educators do as both a preventative measure and response to intervention.

Coordination Between Staff

At WUNYCS, coordination between general education teachers, special education teachers, and service providers is built into daily and weekly routines to ensure seamless support for all students. Each service provider working at our school location will be provided with a tour of both the classroom as well as classroom materials, especially if they are unfamiliar with Montessori curriculum, to determine ways in which services may be rendered directly in the classroom setting. There is time built into the daily schedule, and a later monthly

schedule of specific meetings dedicated to struggling students and or those with IEP's will be determined by the Teacher Leaders. Monthly planning meetings enable co-teachers and service providers—such as speech, occupational, and physical therapists—to align interventions with classroom learning. Regular check-ins, shared documentation, and progress monitoring ensure services remain in sync with students' Individualized Education Programs (IEPs). Additionally, strong family engagement fosters consistency between home and school, reinforcing student progress. This collaborative approach creates an inclusive, student-centered environment where every child can thrive.

Monitoring Achievement

At WUNYCS, monitoring the achievement and progress of students with disabilities is an ongoing, data-driven process embedded within the Montessori framework. Teacher Leaders conduct continuous observation and formative assessments to track student growth in academic, social-emotional, and developmental areas. Progress is documented using Montessori progress monitoring tools, aligned with state standards and individualized learning goals. Student performance is reviewed in weekly co-teacher planning meetings, ensuring targeted interventions remain effective and aligned with each student's needs. Teacher leaders may choose to utilize Transparent Classroom- a digital tool to further improve the efficiency of these observational notes.

In addition to these in-class assessments, formal progress monitoring is conducted to evaluate students' progress toward their Individualized Education Program (IEP) goals. When applicable, any hired special education teachers collaborate with general education teachers (Montessorians) and related service providers to collect data on student performance, adjust instructional strategies, and provide additional support as needed. IEP goal tracking will be monitored through computer based systems in compliance with the Ballston Spa Central School district (for example through Frontline, or similar programs). General education teachers will also be aware of all IEP goals with access to these goals digitally so that they too may support in the collection and ongoing assessment of students proficiency.

Our student progress reports, which document student achievement, will be shared with families each trimester to foster transparency and collaboration. These will be provided both digitally in email and paper based at family conferences for their records. Families of students with IEPS will receive updates on their students progress towards IEP goals at the same time these progress reports are distributed to all students. Additionally, annual IEP reviews, along with parent-teacher conferences, ensure that goals and services remain appropriate and responsive to student needs.

Ongoing Professional Development

WUNYCS will utilize various resources to equip teachers with the skills needed to support students with disabilities. Wildflower Schools will offer direct access to specialized training, including a program in Texas focused on special education. Additionally, educators will have access to a video library featuring training on Montessori strategies and related

topics. We will collaborate with sibling schools in the Wildflower Network to diversify our training, especially programming available virtually which may be turn-keyed at our micro-school to staff and others interested (service providers, families).

We will utilize the following resources in our development of our teacher leaders, in partnership with Wildflower Schools at large:

New York State Education Department (NYSED) Initiatives[49]:

- Office of Special Education: NYSED's Office of Special Education provides up-to-date policies, guidance, technical assistance, and professional development to promote positive outcomes for students with disabilities.

- Behavioral Supports and Interventions: NYSED offers resources to promote healthy learning environments through positive behavioral supports, ensuring students have access to safe spaces conducive to learning.

NYS Response to Intervention Technical Assistance Center (NYS RtI-TAC):

- Professional Development Resources: The NYS RtI-TAC provides guidance documents, self-assessment tools, and training materials to assist educators in implementing effective RTI models.

NYS United Teachers (NYSUT) Resources:

- Fact Sheets and Updates: NYSUT publishes materials on RTI processes, behavioral interventions, and updates to regulations, aiding educators in staying informed about best practices.[50]

NY-RISE Initiative:

- Special Education Support: This initiative offers virtual and in-person professional development sessions tailored for charter school educators, focusing on legally compliant and effective programming for students with diverse learning needs. [51]

By engaging with these resources, educators in New York State can enhance their skills in

[49] New York State Education Department. (n.d.). *Special Education*. Retrieved March 27, 2025, from https://www.nysed.gov/special-education

[50] New York State United Teachers. (2012, April). *Fact sheet 12-17: Response to intervention (RTI)*. Retrieved March 27, 2025, from https://www.nysut.org/resources/all-listing/2012/april/fact-sheet-12-17--response-to-intervention--rti

[51] New York State Education Department. (n.d.). *Serving students with disabilities in charter schools*. Retrieved March 27, 2025, from https://www.nysed.gov/charter-schools/serving-students-disabilities

supporting students with disabilities, effectively implement RTI strategies, and develop comprehensive BIPs to promote positive behavioral outcomes. Each of these programs are provided through the New York State Education Department and to ensure they are utilized effectively educators will collaborate through meetings with families and service providers, sharing progress reports to assess the impact of interventions and refine strategies. As necessary, they may also consult with the Board (of which there will be an academic excellence committee) and/or executive director as she is a certified teacher for students with disabilities in NY. When necessary, we will utilize outside consultants when and if we are finding a student's needs aren't yet met (they are not showing progress towards IEP goals).

c. English Language Learners

As part of the enrollment process, parents or guardians must complete a Home Language Questionnaire (HLQ) to identify students whose primary or home language is not English. If a student's first language or the primary language spoken at home is not English, a Teacher Leader will administer the New York State Identification Test for English Language Learners (NYSITELL) within ten days of the student's start date to assess their English proficiency and determine whether the student is an English Language Learner (ELL) or Multilingual Learner (MLL) and requires language support services.

Purpose and Use:

- Administered once upon a student's initial enrollment if the Home Language Questionnaire (HLQ) indicates a language other than English is spoken at home.
- Evaluates a student's proficiency in listening, speaking, reading, and writing in English.
- Determines the student's eligibility for English as a New Language (ENL) services and their proficiency level, which guides the level of support they will receive.
- Results help schools develop an individualized plan for instruction aligned with New York State regulations.

Administration:

- Given within ten days of enrollment for students who arrive at the start of the school year.
- For students enrolling mid-year, it must be administered within 15 days of enrollment.
- Replaced by the New York State English as a Second Language Achievement Test (NYSESLAT) in subsequent years, which monitors continued progress in English proficiency.

Approach, Resources, and Personnel

Based on the results of the assessment, students are categorized as Entering, Emerging, Transitioning, Expanding, or Commanding, which dictates the level of English as a New

Language (ENL) services they will receive. The NYSITELL ensures that MLLs receive the appropriate level of English language support to help them succeed academically while acquiring English proficiency. The school ensures that English Language Learners (ELLs) are appropriately supported and not misidentified as students with special education needs through ongoing monitoring and a collaborative approach. Teachers, including ENL specialists and general education teachers, actively observe students in the classroom, assessing whether challenges stem from language acquisition or potential learning disabilities. They implement culturally and linguistically responsive instructional strategies before considering any special education referrals. Additionally, one of our board members is a former ENL teacher who has taught in Sudan, Egypt, as well as the US. As needed, we may consult with her for her expertise. Additionally, as necessary, we may consult with other specialists if/when we are struggling to determine whether or not a student is struggling linguistically or because there is a possibility there may be a disability, or both.

Nationally, ELL's constitute a substantial portion of the special education population. In the 2020–2021 school year, 12% of students with disabilities served under IDEA were ELLs[52]. This underscores the importance of accurately distinguishing between challenges related to language acquisition and those stemming from disabilities to ensure appropriate support and services for all students. If an ELL student demonstrates academic or behavioral difficulties, the school follows a Multi-Tiered Systems of Support (MTSS) and Response to Intervention (RTI) framework. This ensures that targeted interventions are applied first, preventing premature referrals to special education when challenges may be due to language development rather than a disability. When assessments are necessary, the school prioritizes culturally and linguistically appropriate evaluations by conducting tests in the student's home language whenever possible. This approach ensures that assessments accurately reflect the student's learning abilities rather than being impacted by language barriers.

Currently, Ballston Spa Central Schools Districts enrollment of ELL/MLL students is fairly low, fluctuating between 0%-2%.[53] In the event a student enrolls at WUNYCS and is identified as an ELL/MLL, they will receive all necessary support to thrive in our inclusive school environment. English Language Learners (ELLs) receive specialized instruction through Integrated ENL, where an ENL-certified teacher collaborates with a general education teacher, or Standalone ENL, where students receive direct language instruction from an ENL teacher. The amount of instructional time required depends on the student's English proficiency level, as mandated by CR Part 154 (Commissioners' Regulations Part 154).

Each year, students take the New York State English as a Second Language Achievement Test (NYSESLAT) to assess their language development and determine if they continue to qualify for ENL services. Once a student reaches the Commanding proficiency level, they receive two

[52] U.S. Department of Education, Office for Civil Rights. (2021). *2020–21 Civil Rights Data Collection: Students with disabilities snapshot*. Retrieved from https://www.ed.gov/sites/ed/files/about/offices/list/ocr/docs/crdc-student-disabilities-snapshot.pdf

[53] New York State Education Department. (2024). *Enrollment data for Ballston Spa Central School District (BSCSD)*. Retrieved [March 27, 2025], from https://data.nysed.gov/enrollment.php?instid=800000038604

years of Transitional Support Services to ensure their continued academic progress. By adhering to New York State Education Department (NYSED) guidelines, our school will provide equitable, linguistically appropriate instruction that supports both the academic and social-emotional needs of ELL students.

Commissioner's Regulations Part 154 (CR Part 154) establishes guidelines for identifying, serving, and supporting English Language Learners (ELLs) and Multilingual Learners (MLLs) in New York State. These regulations ensure equitable access to education by requiring appropriate language instruction, academic support, and assessment accommodations. To determine eligibility for ELL/MLL services, schools must administer the New York State Identification Test for English Language Learners (NYSITELL). Parents are notified of their child's status and must provide consent for services. Once identified, students receive language instruction through Integrated English as a New Language (ENL), where an ENL-certified teacher co-teaches with a general education teacher, or Standalone ENL, where students receive direct instruction from an ENL teacher. The amount of required ENL instructional time is based on a student's English proficiency level as determined by the New York State English as a Second Language Achievement Test (NYSESLAT). Whenever legally necessary, we will employ an ENL teacher to meet these requirements and support our ELL's/MLL's.

Students are reassessed annually using the NYSESLAT to monitor progress. Once a student reaches the Commanding level of proficiency, they receive two years of Transitional Support Services to aid in their continued academic success. In districts with significant ELL/MLL populations, Bilingual Education Programs must be offered in addition to ENL services. Schools are also required to provide translated documents and interpretation services to ensure that families have access to critical information regarding their child's education[54].

Appropriateness Of A Montessori Approach

Aside from New York State's guidance regarding ELL/MLL supports, Montessori pedagogy lends itself to supporting multi-linguistic students as well. The Montessori approach provides an ideal environment for English Language Learners (ELLs) by fostering a language-rich, hands-on, and individualized learning experience that naturally supports language acquisition and academic growth. In a Montessori classroom, students engage with multi-sensory materials that allow them to explore concepts through touch, movement, and visual engagement, reducing reliance on verbal instruction. This hands-on approach enables ELLs to develop language skills organically and at their own pace, minimizing stress while maximizing comprehension. The mixed-age classroom model further enhances language development, as younger students learn from older, more fluent peers who serve as natural language models. Through collaborative group work and peer interactions, ELLs gain consistent exposure to academic and social language in meaningful contexts.

[54] New York State Education Department. (n.d.). *Regulations concerning English language learners and multilingual learners*. Retrieved March 27, 2025, from https://www.nysed.gov/bilingual-ed/regulations-concerning-english-language-learners-and-multilingual-learners

Montessori educators provide individualized instruction, ensuring that each child's language and academic needs are met through differentiated lessons. Language development is seamlessly embedded into daily activities, such as storytelling, practical life exercises, and phonics-based literacy instruction using materials like sandpaper letters and movable alphabets. These methods promote oral language skills, vocabulary expansion, and literacy development in both English and the child's home language.

Additionally, freedom of movement and choice in the Montessori environment reduces anxiety around learning a new language. Students can engage in conversations, ask questions, and take risks in communication without fear of failure, fostering confidence and self-expression. The emphasis on respect for diverse cultures and backgrounds also ensures that ELL students feel valued, included, and supported in their learning journey. This directly aligns with our mission and vision at WUNYCS in regards to inclusion and building a sense of belonging. Research has demonstrated that Montessori education aligns with best practices for ELL instruction, including scaffolding, hands-on learning, and differentiated instruction. By creating an environment that meets students where they are, Montessori education empowers ELLs to develop English proficiency naturally while building confidence, independence, and a lifelong love of learning.

Professional Development

New York State's CR Part 154 ensures that educators are well-equipped to support English Language Learners (ELLs) and Multilingual Learners (MLLs) through targeted professional development and strong accountability measures. These regulations are designed to provide equitable access to education while preventing misidentification of ELLs as students with disabilities. To meet these requirements, general education teachers working with ELLs must dedicate 15% of their annual professional development hours to instructional strategies that support language acquisition, differentiation, and culturally responsive teaching. English as a New Language (ENL) and Bilingual Education teachers are required to allocate 50% of their professional development to topics such as language acquisition theories, research-based interventions, and assessment practices, including training on the New York State English as a Second Language Achievement Test (NYSESLAT). This ongoing training ensures that educators across all content areas are prepared to effectively support ELLs in both language development and academic success. WUNYCS will meet these guidelines in the event we have any ELL's in our classrooms.

In addition to professional development, schools are held accountable for ELL progress through annual state data reporting and compliance reviews. Schools must report ELL enrollment, proficiency levels, instructional services provided, and student progress in both language acquisition and core academic areas. Compliance reviews and site audits are conducted to ensure schools meet instructional time requirements and provide adequate ELL services. Schools failing to comply may be required to implement a Corrective Action Plan (CAP) to address deficiencies. A key aspect of CR Part 154 is ensuring that ELLs are not misidentified as students with disabilities due to language barriers. Schools must conduct culturally and

linguistically appropriate evaluations before referring an ELL for special education services. Multi-Tiered Systems of Support (MTSS) and Response to Intervention (RTI) strategies must be implemented first to determine if challenges stem from language acquisition rather than a learning disability. Whenever possible, assessments should be conducted in the student's home language to ensure an accurate evaluation of their abilities. Again, WUNYCS will meet all requirements as it relates to ELL's in the event we have any who enroll.

By enforcing these regulations, we will ensure that ELLs receive specialized instruction tailored to their language development needs while maintaining equitable access to high-quality education.

Progress Monitoring

WUNYCS will ensure that English Language Learners (ELLs) and Multilingual Learners (MLLs) receive continuous progress monitoring through state-mandated assessments, classroom-based evaluations, and individualized support plans in alignment with CR Part 154.

Annual Assessments & Exit Criteria

ELLs are assessed annually using the New York State English as a Second Language Achievement Test (NYSESLAT) to determine their English language proficiency. Students are scored across four language domains: listening, speaking, reading, and writing. To exit ELL status, a student must achieve a Commanding (proficient) score on the NYSESLAT. Upon reaching proficiency, students receive two years of Transitional Support Services to ensure continued academic success.

Ongoing Classroom-Based Monitoring

Beyond state assessments, teacher leaders will regularly assess ELL progress using classroom performance, formative assessments, and teacher observations. This includes:

- Progress tracking in core subjects with attention to both content knowledge and language development.
- Differentiated instruction and scaffolding to support individual learning needs.
- Regular review of instructional strategies to adapt to student progress and challenges.

Compliance & Data Reporting
WUNYCS will report:

- The number of enrolled ELLs.
- Their proficiency levels (based on NYSESLAT and NYSITELL).
- The instructional services they receive (Integrated ENL, Standalone ENL, or Bilingual Education).
- Their academic progress and language acquisition outcomes.

By implementing data-driven monitoring, individualized support, and compliance with

state regulations, WUNYCS will ensure that ELLs successfully develop English proficiency while achieving academic success.

Communication with Families

Part of our vision at WUNYCS is to model and emphasize equity in all aspects of our school community. With this in mind, we must ensure access to all necessary materials provided by the school to parents/families of ELL's in their home language. To ensure parents of English Language Learners (ELLs) can fully engage with their child's education, the school will provide all essential materials in a language they understand through multiple strategies:

- Translated Documents: Key documents, including enrollment forms, school policies, Individualized Learning Plans (ILPs), report cards, and notices regarding ELL services, will be translated as necessary to the families home language. Any information going home regarding upcoming events or informational flyers regarding school will also be translated (school picture day, invitations to school gatherings, etc to name a few).

- Interpretation Services: The school will provide interpretation services for parent-teacher conferences, meetings, and special education services (if applicable), ensuring parents can actively participate in their child's academic journey.

- Bilingual Staff & Community Partnerships: Whenever possible, we may rely on any bilingual staff or trained interpreters to assist with parent communication. The school will also collaborate with local community organizations that support multilingual families to ensure seamless access to information.

- Accessible Digital & Printed Resources: The school website will feature translated materials, and print copies of important documents in multiple languages will be readily available in our classrooms.

If and when we have after-school and/or other extra-curricular programming, we will also be sure to communicate this in advance to families in their home language. These programs will be made available and accessible to our ELL's. By implementing these measures, WUNYCS ensures that language is never a barrier to parent engagement, fostering a strong home-school partnership that supports student success. WUNYCS is committed to monitoring and improving ELL instruction through data-driven assessments, classroom observations, professional development, and family engagement. The school will ensure multilingual learners receive high-quality language support and equitable access to academic content.

Evaluating Efficacy

Teachers will conduct ongoing classroom assessments, benchmark testing, and annual NYSESLAT evaluations to track language proficiency and academic growth. Each ELL student will have an Individualized Learning Plan (ILP) outlining specific goals and instructional strategies.

The executive director will perform regular instructional walkthroughs to assess ELL teaching strategies as a partner to teacher leaders. Executive directors in Wildflower Schools are not coaches for teacher leaders, but do provide support as needed in relation to compliance related measures. Teacher leaders will also regularly engage in co-planning and check-ins to refine their approach. Teachers will complete 15% of their annual professional development on ELL best practices, including differentiation and culturally responsive instruction. Wildflower will actively involve families by hosting multilingual parent events, conducting surveys, and holding regular conferences to assess program effectiveness and address community needs.

At least one planning meeting monthly will occur between Teacher Leaders/ENL teacher(s) to analyze student progress and adjust instruction accordingly. Students will exit ELL services only after meeting state-defined proficiency levels, with continued monitoring for two years. An annual program review will ensure compliance with CR Part 154 and guide improvements to ELL support services. Through this comprehensive approach, WUNYCS will ensure multilingual learners thrive academically while gaining full English proficiency.

d. Gifted and Advanced Students

WUNYCS is committed to identifying and supporting gifted and talented students through a holistic, observation-based approach that aligns with the Montessori philosophy. Teacher Leaders will carefully monitor student progress, engagement, and mastery of concepts, recognizing those who demonstrate advanced abilities beyond their age or grade level. The self-paced, multi-age classroom environment naturally allows students to work at varying levels, making it easier to identify those who excel and require additional challenge. The identification process will be based on a combination of classroom observations, student work samples, and performance assessments. Teacher Leaders will gather qualitative and quantitative data, including teacher observations, project-based evaluations, and, when appropriate, standardized assessments. Parent and student input will also be considered, ensuring a well-rounded perspective on the child's learning strengths and interests.

For students who enter WUNYCS with an existing gifted designation, their Advanced Learning Plan (ALP) will be maintained and adapted in collaboration with Teacher Leaders and families. If a student is newly identified as gifted while enrolled, an ALP will be developed to provide tailored learning experiences that align with their strengths and interests. To ensure equitable identification, special attention will be given to multilingual learners and historically underrepresented students who may not have been previously recognized for gifted services. Culturally and linguistically responsive assessment strategies will be used to fairly evaluate students' learning potential. By embedding gifted identification within the Montessori model, WUNYCS will create an inclusive, student-centered environment where all children have the opportunity to excel, explore advanced learning opportunities, and reach their full potential.

Montessori Pedagogy for Gifted and Talented Students

The Montessori approach naturally aligns with the needs of gifted and talented (GT) students due to its emphasis on individualized learning, self-paced progression, and access to advanced materials. Unlike traditional education models that often follow a rigid grade-level curriculum, Montessori classrooms allow students to explore subjects at their own pace, ensuring continuous academic challenge and intellectual stimulation. In a Montessori setting, GT students are not restricted by standard grade-level expectations. Instead, they have access to a range of materials and lessons that extend beyond their chronological age, allowing them to work on more advanced concepts when ready. Multi-age classrooms further support this approach by fostering peer-to-peer learning, where students can both mentor others and learn from older peers, reinforcing their knowledge while developing leadership skills.

Montessori's hands-on, inquiry-based learning model encourages deep exploration of topics, which benefits GT students who thrive on complex problem-solving and independent research. Teacher Leaders closely observe and assess students, identifying those who demonstrate rapid mastery of concepts and providing appropriate extensions to keep them engaged. This may include independent projects, accelerated learning opportunities, or additional challenges tailored to the student's strengths and interests. Furthermore, the Montessori philosophy nurtures creativity, critical thinking, and intrinsic motivation—key attributes of many GT students. By allowing them to take ownership of their learning journey, make choices about their work, and engage in interdisciplinary projects, Montessori education supports not only academic excellence but also social-emotional growth, ensuring that GT students remain challenged, inspired, and engaged in their educational experience.

Under Part 117 of the Regulations of the Commissioner of Education, school districts are mandated to establish procedures for the diagnostic screening of every new entrant from pre-kindergarten through grade 12. This screening aims to identify students who may be gifted, have disabilities, or are English Language Learners (ELLs). Specifically, a "possibly gifted" student is one who, based on diagnostic screening, appears to meet the state's definition of gifted and talented.

While specific strategies can vary by district, BSCSD has a gifted and talented program in their elementary schools. As such, we will collaborate with the district on best practices, as they have an established program for GT (gifted/talented) students. Common methods employed to identify gifted and talented students in New York State.[55] include:

1. Diagnostic Screenings: As part of the initial enrollment process, schools conduct screenings to assess various aspects of a student's abilities, helping to identify those who may be gifted
2. Teacher Observations and Nominations: Educators utilize checklists, inventories, and nomination forms to provide insights into students' exceptional abilities. These tools

[55] New York State Education Department. (2024). *Enrollment data for Ballston Spa Central School District (BSCSD)*. Retrieved March 27, 2025, from https://data.nysed.gov/enrollment.php?instid=800000038604

help in recognizing traits such as advanced learning pace, creativity, and problem-solving skills.

3. Standardized Assessments: Some districts may use standardized tests to evaluate students' academic achievements and cognitive abilities, aiding in the identification of giftedness.
4. Performance-Based Assessments: Evaluations of student work, such as portfolios, projects, and performances, provide qualitative data on a student's advanced capabilities.
5. Parent and Peer Nominations: Input from parents and peers can offer additional perspectives on a student's abilities, contributing to a more comprehensive identification process.

Professional Development:

To effectively identify and support gifted students, educators are encouraged to pursue professional development that include[56]s:

- Understanding the characteristics of gifted learners.
- Learning about various identification tools and methods.
- Designing appropriate curricula for gifted students.
- Collaborating with families and communities to provide individualized instruction.

By implementing these strategies within the state's regulatory framework, New York aims to ensure that gifted and talented students are accurately identified and provided with educational opportunities that foster their development.

[56] New York State Education Department. (2024). *General and program-specific requirements for gifted education extensions*. Retrieved March 27, 2025, from https://www.nysed.gov/college-university-evaluation/general-and-program-specific-requirements-gifted-education-extensions

R-09ad-Instructional Leadership

a. Instructional Leadership Roles

At WUNYCS, Teacher Leaders serve as both instructional leaders and administrators, ensuring that the school's vision for high-quality, inclusive Montessori education is effectively implemented. Unlike traditional models where leadership is centralized, Wildflower's approach empowers Teacher Leaders with shared decision-making, professional autonomy, and direct responsibility for both classroom instruction and school operations.

Roles and Responsibilities of Teacher Leaders

Teacher Leaders are the primary instructional leaders, responsible for overseeing and supporting all staff within their school site. This includes Montessori-certified teachers, special education teachers, teacher assistants, and any specialists providing direct instruction. Their responsibilities include:

- Instructional Leadership & Curriculum Implementation:
    - Ensuring Montessori pedagogy and state standards are seamlessly integrated.
    - Overseeing differentiated instruction to meet the needs of all students, including multilingual learners and students with disabilities.
    - Supporting educators in implementing best practices aligned with Montessori methodology and Multi-Tiered Systems of Support (MTSS).
- Teacher Development & Support:
    - Providing ongoing coaching, mentoring, and professional development.
    - Conducting classroom observations and offering feedback to each other and other instructional staff (teachers assistants, ENL teacher, etc).
    - Organizing co-planning time for staff to collaborate on lesson delivery and student progress.
- Data-Driven Decision Making & Student Progress Monitoring:
    - Reviewing student work, observational records, and assessment data to inform instructional practices.
    - Leading Child Study Team meetings to address individual student needs and ensure appropriate interventions.

- Collaboration with Support Staff & Service Providers:
    - Coordinating with ENL instructors and related service providers (e.g., speech therapists, occupational therapists) to ensure all students receive appropriate support.
    - Ensuring compliance with IEPs and 504 Plans while maintaining a fully inclusive learning environment.

- Family & Community Engagement:
    - Maintaining open communication with families about student progress.
    - Facilitating parent-teacher conferences and community discussions on school initiatives.
    - Upholding Wildflower's commitment to a school culture of belonging and shared accountability.

Structure of Instructional Leadership Support

Each Wildflower school operates as a small, teacher-led microschool with distributed leadership. This model ensures that instructional staff are directly supported by Teacher Leaders rather than a top-down administrative structure.

- Teacher Leaders support:
    - Other Teacher Leaders in their charter (primary, lower elementary, upper elementary teachers)
    - Teacher Assistants
    - ENL Teachers
    - Related Service Providers

- Shared Accountability Model:
    - Teacher Leaders collaborate with one another across the Wildflower network for professional learning and operational guidance.
    - They are accountable to their peers, students, families, and the Board of trustees rather than a single principal figure as in most traditional schools.

By centering Teacher Leaders in the instructional leadership model, WUNYCS fosters a school environment where educators have the autonomy, support, and resources necessary to cultivate a responsive, high-quality Montessori education that meets the needs of all students. In addition to the teacher leaders, WUNYCS will have an executive director who plays a charter-wide leadership role. They will be tasked with establishing systems and communication channels that empower Teacher Leaders and staff to effectively serve students, families, and

communities. While ensuring each school maintains autonomy and flexibility, the Executive Director oversees key operational functions that support the success of all sites.

The Executive Director serves as the direct liaison between the Board of trustees and school staff, with primary responsibilities that include:

- Strategic growth and development
- Managing back-office operations
- Facilitating peer reflection and professional learning for Teacher Leaders
- Ensuring compliance as it relates to special education services, ELL mandates, GT students, etc.
- Overseeing charter-wide performance metrics and ensuring accountability to external stakeholders such as CSI and CDE

Additionally, the Executive Director collaborates closely with Teacher Leaders to align site-level initiatives with the overall charter vision, ensuring that each school's activities are synthesized and effectively communicated to public education stakeholders. Acting as the first point of contact for the Board of trustees, CSI, and other regulatory agencies, the Executive Director plays a crucial role in maintaining compliance and advancing the mission of WUNYCS. Further information regarding our leadership structure can be found in R-11ab - School Management and Leadership of this RFP.

A Teacher Leader at WUNYCS is a Montessori educator with an entrepreneurial mindset, a dedication to inclusive educational practices, and a commitment to continuous growth as an educator, co-teacher, and leader. Teacher Leaders take on dual roles as both general education instructors and academic leaders, balancing instructional responsibilities with administrative duties to ensure the success of their school site.

Teacher Leaders exemplify Wildflower's core principles and values, including:

- A commitment to authentic Montessori education
- Entrepreneurial leadership
- Dedication to serving diverse communities
- Generosity of spirit
- A strong work ethic
- A passion for lifelong learning and growth

The process of identifying and selecting instructional leaders at WUNYCS is deeply aligned with our mission and vision, prioritizing individuals who embody Montessori principles, demonstrate a commitment to equity and inclusion, and possess the skills necessary to foster a child-centered, empowering learning environment.

Our instructional leadership model centers on *Teacher Leaders*, who serve as both

educators and administrators, ensuring that decision-making remains close to the students and their needs. The selection of Teacher Leaders follows a structured process that includes self-reflection, community engagement, and rigorous preparation through Wildflower Schools "*School Startup Journey"*- which is a developmental pathway that ensures leaders are equipped to guide a Montessori microschool effectively.

Potential Teacher Leaders begin their journey by engaging in an *exploration phase*, assessing their alignment with WUNYCS's vision, their readiness for leadership, and their capacity to implement high-quality Montessori education. They are supported throughout this phase by existing Montessori educators and stakeholders, ensuring they receive mentorship and guidance in refining their vision for the school.

As candidates advance, they move into *planning and preparation*, where they develop a comprehensive strategy for implementing Montessori pedagogy in a way that ensures inclusivity, equity, and student success. This phase includes training in culturally responsive teaching, Montessori instructional strategies, and equity-focused leadership practices. Candidates also engage in an advice and feedback process with peers, Montessori practitioners, and the school's governing board to ensure alignment with the school's educational philosophy.

Once instructional leaders have successfully completed their *School Startup Journey* and demonstrated the ability to create a Montessori learning environment that prioritizes belonging, hands-on learning, and individualized support, they transition into *Teacher Leader* roles within WUNYCS. The Board of Trustees oversees the final selection process, ensuring that appointed Teacher Leaders not only have Montessori credentials, but also have the vision and entrepreneurial spirit to co-lead a microschool that truly embodies our mission.

Through this process, we ensure that our instructional leaders are not just experienced educators, but dedicated advocates for equity, inclusion, and student-centered learning. By selecting leaders who are deeply invested in our commitment to belonging and empowerment, we create a school environment where all students can thrive, explore, and develop a lifelong love of learning.

Tracking Effectiveness

Teacher Leaders at WUNYCS will continuously track program effectiveness and student progress using Transparent Classroom. This platform allows for daily monitoring of academic performance, helping educators identify students who may be at risk or belong to specific subgroups, such as students with disabilities, English Language Learners, and those receiving free or reduced lunch. Regular analysis of this data enables Teacher Leaders to provide targeted support and ensure all students receive the resources they need to succeed. Further information regarding data collection can be found in section R-06af - Curriculum and Instruction of this RFP.

b. Teacher Support and Supervision

Wildflower Schools are part of a teal organization that believes in self-governing. As

such, WUNYCS classrooms will operate within self-governing groups, known as “pods,” to facilitate collaboration, share responsibilities, and optimize resources. Based on the experience of existing Wildflower schools, pods function most effectively with five to six classrooms before naturally dividing into separate groups. During its initial five-year charter term, WUNYCS will function as a single pod, known as the Leadership Committee. This committee will use self-management strategies to identify collaborative opportunities, delegate responsibilities, and ensure each task is assigned to a designated leader. One key function of the Leadership Committee will be coordinating support systems for Teacher Leaders.

Unlike traditional schools that rely on specialized administrative roles (ie. principal, assistant principal, director of operations), Wildflower schools empower teachers to manage operations using a combination of software tools and personalized coaching. WUNYCS will receive comprehensive support from Wildflower Schools. Resources available to WUNYCS include:

- A school startup toolkit with budget templates, site development guides, and marketing support.
- Transparent Classroom, a centralized platform for record-keeping, enrollment tracking, parent communication, and student progress monitoring.
- A financial management system that streamlines budgeting, bookkeeping, and accounting.
- Access to a network of Wildflower Teacher Leaders for mentorship, peer support, and shared accountability.

As part of their preparation to launch a school, WUNYCS Teacher Leaders will participate in hands-on training at established Wildflower schools. This immersive experience will involve shadowing experienced Teacher Leaders, participating in faculty meetings, and learning best practices for both teaching and school leadership. This training will also provide opportunities to build relationships with mentors, deepen their understanding of the Wildflower model, and refine their vision for their own school.

The Executive Director plays a key role in supporting the overall operations and strategic growth of WUNYCS but does not directly coach Teacher Leaders. Instead, Teacher Leaders operate with a self-governing model, providing peer support and collaborating to guide each other’s development. The Executive Director primarily focuses on building systems and communication structures that enable Teacher Leaders and staff to work effectively in service of students, families, and the broader community while preserving each site’s autonomy and flexibility.

Additionally, the Executive Director serves as the primary liaison between the Board of trustees and charter-wide staff, ensuring alignment between site-level activities and overall charter goals. While not involved in the direct coaching/observations of Teacher Leaders, the Executive Director ensures that performance goals and compliance measures are met and provides an additional layer of support as needed. If and when needed, the Executive Director

may step in to support Teacher Leaders at their request- as mentioned previously especially as it pertains to our inclusive school model and special education supports. This is further reflective in the narratives and organizational charts of R-11ab - School Management and Leadership of this RFP.

c. Professional Development

WUNYCS provides ongoing, self-directed professional development through monthly meetings, opt-in training workshops, and peer collaboration. Teacher Leaders participate in multi-day training before the school year, structured learning days for assessment analysis, and site visits to high-performing Wildflower schools. The Wildflower School Certification Process and coaching from The Wildflower Foundation further support growth in Montessori practices, operations, and leadership.

One day is currently designated specifically in our school calendar (September 25 in year one) to professional development, at the start of each year so that Teacher Leaders may determine appropriate professional development opportunities they may be interested in and/or align with the demographics of that year's students at the start of the year together. Teacher leaders will have autonomy over choosing professional development past this date that aligns with the students as well as meets requirements of NYS (for example, required percentages of PD related to ELL's for example). As necessary, substitute teachers and/or the executive director will cover for staff when they are seeking to attend professional development sessions in other locations that may not be virtually provided. A full professional development timeline will be drafted by Teacher Leaders prior to the start of the school year so that we may address any further professional development days prior to posting and sharing our official school calendar with families.

We believe in the importance of ongoing professional development and teachers staying up to date in their practice. With exact dates determined by Teacher Leaders, we will set aside specific dates allotted for professional development prior to the first day of school for a strong start. We will also ensure one day per Teacher Leader to visit another high performing Wildflower School and two visits annually from a Teacher Leader of a high performing Wildflower School (which is part of the annual Wildflower School Certification Process). On the days Wildflower Teacher Leaders from other schools visit our school, teachers will have the day after the observation as a professional development day in order to discuss and plan for action based on observational feedback. Exact dates will be coordinated with Wildflower Schools Teacher Leaders and our Executive Director and Teacher Leaders.

As part of its affiliation with The Wildflower Foundation, WUNYCS will participate in an annual certification process. This review involves Teacher Leaders from Wildflower schools across the country visiting local sites to conduct a thorough evaluation. They will collect evidence and provide feedback focused on the school's alignment with Key Design Elements, as well as its curriculum and instructional approaches outlined in the RFP. Teacher Leaders will use this process to reflect on the school's progress in fulfilling its mission, upholding Wildflower's values, and addressing the specific needs of our students and

community. This peer-led evaluation serves as an opportunity for continuous learning, collaboration, and improvement, allowing Teacher Leaders to gain insights from other schools, seek advice, and celebrate successes.

At WUNYCS, professional development is teacher-driven and coordinated by the Leadership Committee (ie. 'pod' which will consist of each set of Teacher Leaders across grade bands in years 1-5). Teacher Leaders take the lead in identifying and facilitating training sessions based on individual and collective needs rooted in our community. Professional development topics are determined through ongoing reflection, peer collaboration, and student data analysis, ensuring alignment with Montessori best practices, equity-focused instruction, and student achievement. Additional coaching and training are provided by The Wildflower Foundation, which offers support in Montessori implementation, school operations, and leadership development. As our specific mission and vision aligns to inclusion, we will utilize NYSED and other locally provided professional development for students with disabilities.

WUNYCS's professional development plans are designed to align with the school's mission of creating an inclusive, child-centered Montessori learning environment. Training sessions focus on Montessori methodology, equity-driven practices, and differentiated instruction to support diverse learners-specifically students with disabilities. Teacher Leaders engage in peer-led professional development, coaching from The Wildflower Foundation, and external training opportunities to ensure instruction remains responsive to student needs. By prioritizing culturally responsive teaching, social-emotional development, and specialized strategies for supporting target populations, professional development directly reinforces the school's key design elements and commitment to equity, personalized learning, and student empowerment. Additionally, in order for all students and families to feel a sense of belonging, teachers will receive professional development in both restorative justice practices and conscious discipline- fostering a social/emotional learning environment that thrives on respect for everyone.

The professional development program at WUNYCS is designed to meet the diverse needs of all educators, ensuring continuous growth and support. For novice teachers and those new to the school, professional development will include mentorship, ongoing Montessori training, and structured onboarding to familiarize them with the school's self-directed model. The early childhood special education teacher will participate in Montessori training to align on pedagogy. Highly effective teachers will have opportunities to deepen their expertise through advanced Montessori training, leadership development, and participation in peer coaching. Both teacher leaders will be teaching students with disabilities and possibly English Language Learners (ELLs), so they both will receive specialized training in differentiated instruction, inclusive practices, and culturally and linguistically responsive teaching. Professional development will be tailored to meet the needs of all subject areas, ensuring that every educator has the tools and strategies necessary to effectively support their students. The program will be ongoing, collaborative, and reflective, empowering teachers to continuously refine their practice in alignment with the school's mission and student-centered approach. WUNYCS supports teacher leaders in seeking professional development that aligns with their expertise and is of service to our

students.

Additionally, WUNYCS will receive ongoing support from The Wildflower Schools Foundation (TWF) to ensure that Teacher Leaders have access to continuous coaching in three key areas: campus-level operations and finance, Montessori instructional excellence, and personal growth and leadership development. TWF coaches develop resources and training tailored to the needs of Teacher Leaders, including support for novice educators, those new to TWF or Montessori, and experienced teachers seeking further development. To enhance leadership and operational skills, TWF offers professional workshops covering topics such as accounting, branding and marketing, website management, board governance, school fundraising, and organizational efficiency. Additionally, in alignment with TWF's commitment to holistic development, wellness practices such as meditation are incorporated into professional development.

For Teacher Leaders who have not yet earned their Montessori certification (for example, a special education teacher or teachers assistant) and are interested in becoming Montessori certified, TWF provides full financial support for training, including tuition coverage. By investing in their development, we aim to build a strong internal pipeline of Montessori-trained educators, which not only supports our long-term growth strategy but also promotes teacher retention and deepens alignment with our instructional model. This approach reflects our belief in cultivating leadership from within and ensuring that our educators are empowered to grow alongside the school. Teacher Leaders are responsible for sharing their learning with colleagues through professional development sessions within WUNYCS. TWF also provides assessment tools, research-based training, and instructional support to help Teacher Leaders effectively monitor student learning and make data-driven adjustments to their teaching. Through TWF's national knowledge-sharing system, Teacher Leaders have access to peer collaboration and best practices from across the network, fostering continuous learning and improvement in both academic and socio-emotional development.

One of Wildflower's 9 principles is a decentralized network. The TWF network's national knowledge management system facilitates the peer-to-peer exchange of ideas and practices across all Wildflower Schools and campuses. Wildflower schools aim to be a viable option for children and families everywhere. As the network expands, it fosters a growing community of learners and educators who collaborate while benefiting from shared resources and economic efficiencies. However, maintaining each Teacher Leader's autonomy remains a priority, and Wildflower intentionally limits centralized administration and authority. Each school operates as an independent entity, making its own decisions while having access to network-wide resources when beneficial. At the same time, schools recognize their accountability to neighboring Wildflower schools and the broader community, contributing to the success of both current and future schools. Additionally, Wildflower is committed to transparency by publicly sharing materials, software, and insights whenever possible, ensuring that all schools—whether part of the network or not—can benefit from its knowledge and resources. By relying on a network of schools with a belief in sharing best practices, WUNYCS teacher leaders join a growing network of professionals seeking to stay up to date in their profession.

Assessing Effectiveness

WUNYCS will assess the effectiveness of its professional development program through a combination of teacher self-assessments, peer feedback, student outcomes, and ongoing reflection. Teacher Leaders will regularly evaluate their learning through self-reflection journals and discussions during staff meetings, allowing them to share insights on the impact of their professional development experiences. Additionally, peer feedback will be gathered through structured observations and collaborative discussions within the Leadership Committee to determine whether professional development initiatives are effectively enhancing instructional practices.

Student achievement and engagement will serve as a critical measure of success, with teachers analyzing student progress data to determine whether professional learning opportunities are translating into improved outcomes within the classroom. Surveys and feedback from Teacher Leaders will help identify areas of strength and opportunities for growth in the program. The Leadership Committee will use this data to refine and adapt future professional development offerings, ensuring they remain responsive to the evolving needs of educators and students. By embedding professional development evaluation into the school's culture of continuous improvement, WUNYCS will ensure that learning opportunities are meaningful, relevant, and aligned with the school's mission and goals.

d. Teacher Evaluation and Accountability

The evaluation and accountability system for teachers at WUNYCS is designed to align with the school's mission of authentic Montessori principles to promote equity and inclusion in our community. The system was chosen to reflect Wildflower's belief that educators are intrinsically motivated professionals who should be empowered to assess their own performance through structured reflection, peer feedback, and shared decision-making. This system also integrates national best practices from The Wildflower Schools Foundation (TWF).

At WUNYCS, the teacher evaluation system is more than just an accountability measure—it is a reflection of the school's larger commitment to self-management, autonomy, and community-driven education. Rooted in Wildflower's decentralized leadership model, the evaluation framework was carefully chosen to empower Teacher Leaders with the tools they need for continuous growth while ensuring they remain accountable to themselves, their students, and the broader school community.

Our process, designed to reflect the self-management principles of The TWF system, will be developed and approved by the Board. This process will focus on both functional and pedagogical performance and will include:

- **Biannual Self-Evaluation:** Staff will conduct self-assessments twice a year—once at the end of the calendar year and again in late spring. Alternatively, they may adjust their review schedule using the advice process.
- **Comprehensive Input:** Evaluations will incorporate classroom performance data,

benchmarks, and feedback from colleagues, families, and community partners to ensure a well-rounded assessment.

- **Annual Retention Decision:** During the spring review, staff members will determine whether they will continue in their role for the following year.
- **Review Committee Oversight:** A committee made up of one Teacher Leader from each classroom (at year 5 full build out) will examine self-evaluations, considering data, feedback, and how individuals have acted on advice received. If discrepancies arise, the committee may initiate the conflict resolution process.
- **Board Oversight:** The Board will review retention decisions and has the authority to invoke the conflict resolution process if it believes an evaluation outcome needs to be reconsidered.

This system draws on key frameworks that shape WUNYCS's approach to teacher evaluation. The TWF School Start-Up Journey provides structured, peer-driven assessments and ongoing mentorship, ensuring that teachers receive support as they develop professionally. Also, stakeholder involvement is woven into every aspect of the evaluation process, ensuring that instructional effectiveness is assessed not just from an administrative perspective but through the voices of those most impacted—students, families, and fellow educators. By integrating these frameworks, WUNYCS has built an evaluation system that aligns with our educational vision of all families and students feeling a sense of belonging with our school.

Beyond evaluation, the system is designed to support ongoing professional development rather than serve as a punitive measure. Teachers receive coaching in areas such as school operations, instructional excellence, and leadership growth, ensuring they have the resources needed to improve and thrive. Moreover, decision-making remains a collaborative process. Whether through structured reviews, conflict resolution mechanisms, or stakeholder input, transparency and shared accountability are at the core of how evaluations are conducted. The teacher evaluation system consists of several key components that ensure a fair, transparent, and effective process. Self-reflection and peer review play a crucial role, with Teacher Leaders completing a Summative Self-Reflection each year. This reflection incorporates feedback from students, peers, and families, offering a well-rounded perspective on teacher performance. A Review Committee, composed of fellow Teacher Leaders, then assesses these reflections, providing guidance and ensuring accountability. The evaluation process also includes structured evaluation windows twice a year, at the end of the calendar year and in late spring. During these windows, Teacher Leaders analyze classroom data, student achievement benchmarks, and qualitative feedback to determine whether they should continue in their role for the next academic year. The Board will review these evaluations, offering feedback and guidance to support continuous improvement.

For cases where underperformance is identified, Wildflower New York will utilize TWF's built-in conflict resolution and accountability mechanisms. Teacher Leaders receiving critical feedback engage in a structured Conflict Resolution Process with the support of the executive director, providing them with a clear pathway for growth and improvement. However, should performance concerns persist, the Board retains the authority to intervene, ensuring that the

highest standards of student achievement and instructional effectiveness are maintained. Ultimately, Wildflower NY's teacher evaluation system is a natural extension of its mission. By combining self-evaluation, peer input, stakeholder involvement, and structured reflection, the system nurtures a culture where educators are continuously growing while remaining accountable for student success. It ensures that every teacher, just like every student, is supported in their journey toward excellence.

R-10a - Culture and Discipline

a. School Culture

WUNYCSs's Approach to School Culture and Its Rationale

WUNYCS's school culture is intentionally designed to cultivate independence, self-regulation, and a deep sense of community responsibility among students, teachers, and families. Rooted in Montessori philosophy and the Wildflower network's self-management principles, the school environment prioritizes holistic child development, fostering both academic excellence and social-emotional growth. The approach is centered on trust, autonomy, and collective responsibility, ensuring that students are not only engaged in rigorous academics but also actively contributing to a respectful and inclusive learning environment. At the root of our mission is inclusivity and belonging, and it is with these in mind that we approach school culture.

Core Elements of the School Culture

1. Montessori Foundations: Fostering Independence and Self-Discipline

WUNYCS follows the Montessori approach, in which every aspect of the classroom environment is designed to promote self-regulation and decision-making. Students are encouraged to move freely, make choices, and take responsibility for their learning. Classroom norms, such as returning materials to their proper place and helping peers, reinforce agency, accountability, and communal respect.

Rather than relying on external discipline or extrinsic rewards, the school emphasizes intrinsic motivation—teaching students to understand the impact of their actions on themselves and their peers. This aligns with Maria Montessori's belief that "discipline must come through liberty," ensuring that students internalize respect and self-control rather than merely conforming to authority.

2. Small, Community-Driven Microschools: Personalization and Equity

Wildflower schools are intentionally small, teacher-led microschools, allowing for deep relationships between students, Teacher Leaders, and families. Montessori's mixed age grade bands allow for relationships to build across a three year span. This model fosters a close-knit, inclusive community where every student is known, supported, and valued.

WUNYCS is committed to diversity, equity, and cultural responsiveness, ensuring that learning environments reflect and honor students' lived experiences. Our inclusive model ensures all students and their families, especially those with disabilities, feel that the school is an extension of home- supportive of all their students' needs. The school actively engages families and community members, making them partners in the educational process. From

home visits and community meetings to family education nights, the school builds authentic relationships that bridge home and school.

4. Prepared Environments and Student-Led Learning: Encouraging Exploration and Engagement

The school culture is shaped by Montessori's prepared environment, where students take ownership of their learning through hands-on, inquiry-based exploration. Unlike traditional schools that rely on rigid behavioral expectations and passive learning models, WUNYCS provides:

- Multi-age classrooms, where students learn at their own pace while mentoring and supporting one another.
- Hands-on Montessori materials, fostering deep cognitive engagement and real-world application.
- Personalized work plans, allowing students to take ownership over their progress and goals.

This approach rejects rote memorization and compliance-based instruction in favor of critical thinking, creativity, and problem-solving. The classroom design and instructional model support the development of confident, self-directed learners who are intrinsically motivated to explore and grow. The prepared environment lends itself to a focused and respectful classroom setting.

WUNYCS's school culture is deliberately structured to create an environment where children feel safe, supported, and empowered. This approach is rooted in:

- Research on small school models, which shows that personalized, relationship-driven environments lead to higher student engagement and well-being.
- Montessori pedagogy, which emphasizes independence, choice, and real-world learning experiences.
- The Wildflower network's decentralized leadership structure, ensuring that Teacher Leaders have the autonomy to shape a responsive and culturally relevant school environment.
- Evidence-based social-emotional learning practices, which demonstrate that self-regulation and positive discipline lead to better academic and behavioral outcomes.

By fostering autonomy, collaboration, and reflection, WUNYCS cultivates a thriving, student-centered learning community that prepares children not just for school, but for lifelong success.

Specific Programs/Methods:

1. Restorative Justice and Conscious Discipline: A Proactive Approach to Behavior

WUNYCS embraces restorative justice and Conscious Discipline to maintain a positive and respectful learning environment. Restorative justice is used to help students understand the impact of their actions, take responsibility, and repair any harm caused. This approach emphasizes relationship-building, conflict resolution, and meaningful accountability, rather than punitive discipline. A designated space in the classroom, the Peace Corner, may be utilized for conflict resolution between peers or self-requested and prompted breaks as needed for students throughout the day.

At WUNYCS, we are committed to creating an inclusive environment that supports the diverse needs of all learners, especially students with disabilities. Traditional token economy systems—where students earn rewards for compliance—often fall short in supporting long-term emotional growth or promoting genuine self-regulation. These approaches can unintentionally exclude or shame students who struggle with behavioral expectations, particularly those with neurodiverse learning profiles or trauma histories.

As such, in alignment with our commitment to equity and inclusion, we have chosen to implement Conscious Discipline, a trauma-informed, relationship-based approach that prioritizes connection, co-regulation, and emotional safety. Rather than focusing on external rewards, Conscious Discipline helps students develop internal skills for managing behavior and resolving conflict. We believe this approach better reflects our values, supports all students more authentically, and promotes a sense of belonging for those who have traditionally felt marginalized in school settings. Through this model, Teacher Leaders model composure, encouragement, and assertiveness, helping students navigate interpersonal challenges in a constructive way. These practices reinforce self-regulation and equip students with tools for collaboration, resilience, and emotional intelligence—critical skills for success in school and beyond.

2. Montessori Practical Life, Sensorial, Aesthetic, and Mindup Curriculum

Montessori curriculum plays a crucial role in helping elementary-aged students build self-awareness, independence, and emotional regulation, all of which are foundational for social-emotional development.

- Practical Life Activities: Through daily tasks such as pouring, cleaning, or food preparation, students develop concentration, patience, and responsibility, which fosters self-confidence and resilience. These activities also encourage collaboration and respect as students work together in a shared environment.
- Sensorial Development: Engaging with materials that refine the senses (touch, sight, hearing, taste, and smell) helps children become more attuned to their emotions and the emotions of others, promoting empathy and emotional intelligence.

- Aesthetic Appreciation: Exposure to beauty in art, music, and nature cultivates mindfulness and emotional expression, encouraging students to appreciate and respect different perspectives.
- Personal Development: Montessori's emphasis on grace and courtesy lessons helps students practice kindness, self-regulation, and conflict resolution, making them more socially aware and emotionally mature.

By integrating hands-on experiences with structured personal development, this curriculum equips students with the skills needed to navigate social interactions, build positive relationships, and develop self-discipline.

2. Montessori Peace Keepers Curriculum

The Peace Keepers Curriculum is designed to help children understand conflict resolution, emotional regulation, and community-building through intentional lessons and practices.

- Peace Table: Students are encouraged to bring conflicts to the "Peace Table," where they engage in guided conversations, active listening, and problem-solving to resolve disputes peacefully.
- Mindfulness and Breathing Techniques: The curriculum incorporates practices that help students calm their minds and bodies, allowing them to respond thoughtfully rather than react emotionally in difficult situations.
- Empathy and Perspective-Taking: Through role-playing and storytelling, students learn to consider others' feelings and viewpoints, fostering compassion and social awareness.
- Community Responsibility: The program reinforces that each student has a role in maintaining a peaceful, respectful, and inclusive classroom environment, strengthening their sense of belonging and social responsibility.

By embedding these practices into daily routines, the Peace Keepers Curriculum helps children develop strong conflict-resolution skills, emotional intelligence, and a sense of community accountability.

3. MindUp Program

MindUp is a research-based social-emotional learning (SEL) program that integrates neuroscience, mindfulness, and positive psychology to support students' emotional and cognitive well-being. Integrating a structured Social-Emotional Learning (SEL) curriculum into our Montessori micro-school designed for students with disabilities will enhance emotional regulation, social engagement, and executive functioning. While Montessori education naturally fosters independence and self-regulation, many students with disabilities, including those with autism, ADHD, or sensory processing differences, benefit from explicit instruction in managing emotions, navigating social interactions, and developing self-advocacy skills. SEL programs provide structured tools such as emotion check-ins, mindfulness exercises, and cooperative

learning activities, reinforcing Montessori's emphasis on respect for the child while offering additional scaffolding for those who need targeted support. This integration ensures students can develop self-awareness, conflict resolution skills, and the ability to self-regulate in a way that aligns with the Montessori philosophy of fostering autonomy and intrinsic motivation.

Additionally, incorporating SEL strengthens executive functioning, trauma-informed practices, and family partnerships, all of which are vital for students with disabilities. SEL instruction supports task initiation, impulse control, and organization, helping students engage meaningfully in Montessori's self-paced, hands-on learning environment. It also creates a predictable and emotionally safe classroom culture, which is especially beneficial for students with anxiety, sensory sensitivities, or past negative school experiences. Beyond the classroom, SEL provides families with shared language and strategies to reinforce at home, strengthening the collaborative relationship between educators and parents. By merging Montessori's individualized, student-centered approach with explicit SEL instruction, the school creates an inclusive, developmentally responsive environment where all students—regardless of ability—can thrive. MindUp focuses on:

- Brain-Focused Learning: Students learn about the brain's role in emotions and behavior, helping them understand how to regulate feelings like frustration, anxiety, or anger.
- Mindful Breathing and Reflection: Simple mindfulness exercises help students increase self-awareness, focus, and impulse control, leading to more thoughtful interactions with peers.
- Gratitude and Optimism: The curriculum includes practices such as gratitude journaling and positive thinking exercises, which boost emotional resilience and a growth mindset.
- Acts of Kindness and Compassion: MindUp encourages students to engage in prosocial behaviors, such as helping others, showing appreciation, and practicing kindness, which strengthens empathy and positive social connections.

By helping students understand and regulate their emotions, stay present in the moment, and develop a positive outlook, MindUp enhances their ability to navigate social challenges, build healthy relationships, and thrive in academic and personal settings.

Together, the Montessori Practical Life Curriculum, the Peace Keepers Curriculum, and MindUp create a comprehensive social-emotional learning framework that fosters:

- Self-awareness – Understanding emotions, thoughts, and actions
- Self-regulation – Developing patience, impulse control, and focus
- Empathy and perspective-taking – Understanding and valuing others' experiences
- Conflict resolution – Using communication and problem-solving to resolve disagreements
- Mindfulness and emotional resilience – Managing stress, staying present, and cultivating gratitude

By integrating these approaches, students develop the emotional intelligence, social

skills, and confidence needed to navigate their relationships, learning experiences, and future challenges with resilience and kindness. It is with the vision of a classroom that fosters belonging and support that we chose these SEL related curriculums.

Equity in Discipline Practice

At WUNYCS, equity is not just a goal—it is embedded in every aspect of the school's culture, from the way teachers interact with students to the programs that guide classroom dynamics and discipline. Grounded in Montessori principles, restorative justice, and social-emotional learning, the school's approach ensures that every child feels a deep sense of belonging, safety, and empowerment- in line with our vision. Teachers and staff receive intentional training and support to create an environment where all students thrive, regardless of background or ability.

One of the key ways Wildflower fosters equity is through the implementation of Restorative Justice (RJ) practices. Rather than relying on punitive discipline, RJ encourages students to understand the impact of their actions, take responsibility, and work to repair harm in a way that strengthens relationships. In practice, this means that students engage in peace circles, structured dialogues, and problem-solving discussions to resolve conflicts. Every classroom has a Peace Table or designated area of the room meant for Peace (Peace Corner, for example), a space where students can engage in guided conversations to work through disagreements with the help of a teacher or peer mentor. By integrating these restorative approaches into daily routines, students learn how to navigate social challenges, express emotions constructively, and foster a culture of accountability and respect.

Alongside Restorative Justice, Conscious Discipline (CD) is another key framework shaping the school's approach to behavior and emotional regulation. CD is based on the idea that adults must first develop their own self-awareness and emotional intelligence before they can effectively support children in doing the same. Teachers are trained in positive behavior management strategies that focus on building connections, reinforcing self-regulation, and setting firm yet compassionate boundaries. This approach replaces traditional discipline models with mindfulness practices, emotional check-ins, and conflict-resolution techniques that help students develop resilience and empathy. By equipping teachers with tools to redirect behavior in a supportive and developmentally appropriate manner, CD creates a classroom culture rooted in mutual respect rather than compliance and control.

To further ensure an inclusive and equitable environment, WUNYCS is in line with Wildflower Schools commitment to Culturally Responsive-Sustaining Education (CRSE) training for all teachers and staff. Recognizing that education is not one-size-fits-all, CRSE ensures that every student's identity, background, and lived experiences are honored and reflected in the curriculum and classroom practices. Teachers participate in ongoing professional development focused on identifying and dismantling biases, incorporating diverse perspectives into the curriculum, and fostering inclusive learning spaces. Families are also actively engaged in this process, with outreach efforts, community-building events, and open dialogues that ensure all voices are heard and valued.

Beyond behavior management and equity training, the structure of the classroom itself is designed to support social-emotional well-being and inclusivity. WUNYCS operates using a multi-age classroom model, where students stay with the same Teacher Leader for multiple years. This continuity allows teachers to develop deep relationships with students and their families, ensuring that every child receives individualized support and guidance. The sense of stability and familiarity helps reduce anxiety, foster emotional safety, and build trust, which is especially beneficial for students who may struggle with transitions or external challenges. Older students take on mentorship roles, modeling positive behavior and reinforcing classroom norms, creating a collaborative rather than competitive learning environment.

Together, these programs and approaches form the foundation of a school culture that prioritizes belonging, respect, and student agency. Restorative Justice ensures that students are held accountable in a way that strengthens relationships rather than alienates them. Conscious Discipline equips teachers with the skills to nurture emotional intelligence and positive behavior. Culturally Responsive Education ensures that all students see themselves reflected in their learning environment. And the multi-age classroom structure fosters long-term connections that allow students to feel seen, understood, and supported every step of the way. At WUNYCS, equity is not an add-on—it is a core value that shapes every interaction, decision, and structure within the school. By intentionally embedding these practices, the school creates a learning community where every student, teacher, and family feels empowered to grow, contribute, and thrive.

At WUNYCS, school culture is intentionally cultivated across all stakeholders—board members, staff, students, and families—through a shared commitment to Montessori principles, self-management, equity, and restorative practices. The school ensures that culture and expectations are not just communicated but actively lived through onboarding, professional development, community-building activities, and ongoing engagement.

Board Members Roles

Board members play a critical role in upholding and modeling the school's values through governance and decision-making. To ensure alignment with the school's mission, WUNYCS implements:

- Comprehensive Board Orientation: New board members undergo an in-depth onboarding process, which includes training in:
    - Montessori philosophy and self-management governance
    - Restorative justice and Conscious Discipline approaches
    - Inclusion, which aligns with our mission and vision
- School Immersion & Visits: Board members regularly visit classrooms, attend community meetings, and observe Montessori practices in action to experience the culture firsthand. We encourage visitors to our school which includes our board members.

- Ongoing Reflection & Training: The board engages in continued learning through structured professional development sessions, ensuring that governance decisions consistently align with Wildflower's core values.

- Active Community Involvement: Board members participate in family events, town halls, and student showcases to maintain strong connections with staff, students, and families.

Teacher Leaders, Executive Director, and Staff

At Wildflower, Teacher Leaders, the Executive Director, and staff are the primary stewards of school culture. Their role extends beyond academics to modeling self-management, fostering equity and inclusion, and supporting social-emotional development. To ensure alignment, the school provides:

- Pre-Year Onboarding & Training: Before the school year begins, staff engage in intensive professional development covering:

    - Montessori principles and classroom management
    - Restorative justice and conflict resolution strategies
    - Conscious Discipline for emotional regulation and behavior support
    - Culturally responsive teaching and ABAR training

- Ongoing Professional Development: Throughout the year, Teacher Leaders participate in:

    - Weekly check-ins and peer coaching to reinforce best practices
    - Community-building activities to foster collaboration and shared leadership
    - Equity-focused workshops to ensure continued commitment to inclusivity

- Teacher Self-Governance & Leadership: Staff operate under a self-management model, taking ownership of decision-making, problem-solving, and school-wide initiatives.

Instilling Culture and Expectations with Students

Students are active participants in shaping the school's culture, learning through direct experience how to be self-directed, responsible, and community-minded. To embed expectations, Wildflower schools implement:

- Montessori Ground Rules & Community Agreements: At the start of the school year, students help create a classroom constitution, setting shared norms that promote respect, responsibility, and collaboration.

- Daily Social-Emotional Practices:

    - Morning meetings set the tone for the day, allowing teachers to check in with students' emotional states.
    - Grace and Courtesy lessons explicitly teach social skills, emotional regulation, and conflict resolution.

- Restorative Justice in Action: Instead of punitive discipline, students engage in restorative conversations, peer mediation, and Peace Table discussions to resolve conflicts.

- Multi-Age Classroom Mentorship: Older students model positive behavior and reinforce expectations for younger peers, creating a culture of mentorship and accountability.

Instilling Culture and Expectations with Families

WUNYCS views families as essential partners in maintaining a strong school culture. Parents and caregivers are actively engaged through:

- Home Visits & Personal Connections: Before the school year starts, Teacher Leaders conduct home visits to build strong relationships with families, ensuring trust and open communication.

- Family Orientation & Ongoing Education: Families participate in workshops on:

    - Montessori education and how learning happens in a child-centered environment
    - Restorative justice and how conflict resolution works at school and at home
    - Conscious Discipline strategies for supporting emotional regulation

- Consistent Communication & Community Engagement:

    - Regular newsletters and updates keep families informed.
    - Monthly community events and family education nights allow parents to actively participate in school life.
    - Opportunities for volunteerism reinforce shared responsibility for the school community.

WUNYCS ensures that its culture and expectations are deeply ingrained in every aspect of the school community as a vision for our school involves a sense of belonging. Through structured onboarding, continuous training, student-centered engagement, and active family involvement, the school fosters a culture of belonging, accountability, and shared leadership. This approach ensures that all stakeholders—board members, staff, students, and families—not only understand the school's values but also actively contribute to shaping and sustaining them.

b. Discipline Policy (General Education)

> "...The child is not a blank slate; he is a spiritual being, inherently good and full of potential."- *Maria Montessori*

This quote reflects Maria Montessori's deep conviction that children are born with innate goodness, moral potential, and the capacity for peace, which education should nurture, not control or suppress. It is through this lens that we have crafted our discipline policies. At WUNYCS, discipline is not about punishment, it is about growth, accountability, and community-building. Rooted in Montessori philosophy, Restorative Justice, and Conscious Discipline, the school's approach prioritizes positive behavioral interventions, self-regulation, and repairing harm rather than punitive consequences.

Teacher Leaders work closely with students to foster self-discipline and emotional intelligence by helping them understand the impact of their actions on themselves and others. When conflicts arise, students are encouraged to problem-solve, engage in open dialogue, and take responsibility for repairing harm. Restorative Justice practices such as peace circles, conflict mediation, and reflective conversations are used to resolve disputes and rebuild relationships. Rather than removing students from the learning environment, WUNYCS employs inclusive discipline strategies that focus on teaching self-regulation and conflict resolution skills. Students are provided with tools to de-escalate emotions, reflect on their choices, and work collaboratively to find solutions. Teacher Leaders guide them through Grace and Courtesy lessons, social-emotional check-ins, and classroom agreements, ensuring that every student has a clear understanding of behavioral expectations.

The school avoids exclusionary discipline whenever possible, including suspension and expulsion, which are only considered as a last resort in cases where safety is at risk. Instead, the discipline policy centers on proactive support, interventions tailored to individual student needs, and a culture of mutual respect and accountability. If and when a child has posed a safety risk to our community, our discipline policy will consider alternate interventions such as removal from the classroom- but this is solely once other proactive measures/methods have been applied. By embedding trauma-sensitive and healing-centered engagement into its discipline model, WUNYCS ensures that every student—regardless of background or behavioral challenges—has the opportunity to learn, grow, and thrive in a safe, supportive, and empowering school community. Our mission is that all children in our school feel safe, seen, and supported. Our discipline framework embraces this mission.

We recognize that students may, at times, exhibit noncompliant or challenging behaviors, and it is our responsibility to respond in a supportive and developmentally appropriate manner. To ensure consistency and clarity, we have adapted a disciplinary framework from our sibling school, Wildflower New York Charter School in the Bronx. This shared approach allows us to align with best practices already in use within the Wildflower

network while providing a structured, transparent process for addressing behavioral incidents when they arise. The table is represented below:

'Level 1' infractions Noncompliant/Uncooperative Behaviors	*Range of possible guidance interventions*	*Range of possible disciplinary responses to be used in addition to guidance interventions*
1. Unexcused absence from school 2. Being late for school 3. Bringing items to or using items in school in violation of school policy 4. Behaving in a manner which disrupts the educational process (e.g., making excessive noise in a one-roomed shopfront, library, or hallway) 5. Engaging in verbally rude or disrespectful behavior 6. Posting or distributing material on school premises in violation of written school policy and/or school rules 7. Using school computers, fax machines, telephones or other electronic equipment or devices without appropriate permission	● Parent outreach ● Intervention by counseling staff ● Guidance conference(s) ● Restorative Approaches ● Positive Behavioral Interventions and Supports (PBIS) ● Individual/group counseling ● Peer mediation ● Mentoring program ● Conflict resolution ● Collaborative problem solving ● Development of individual behavior contract ● Short-term behavioral progress reports ● Community service (with parental consent) ● Referral to a Community-Based Organization (CBO) ● Functional Behavioral Assessment (FBA)/Behavioral Intervention Plan (BIP)	A. Admonishment by pedagogical school staff B. Student/teacher conference C. Reprimand by teacher leaders D. Parent conference E. In-school disciplinary action (e.g., formal restorative conference, detention, community separation) F. Removal from classroom by teacher (After a student is removed from any classroom by any teacher three times during a trimester, a suspension must be sought if the student engages in subsequent behavior that would otherwise result in a removal by a teacher.)

Level 2 infractions: Disorderly Behavior	*Range of possible guidance interventions*	*Range of possible disciplinary responses to be used in addition to guidance interventions*
8. Smoking and /or use of electronic cigarettes and/or possession of matches or lighters 9. Gambling 10. Using profane, obscene, vulgar, or lewd language, gestures, or behavior 11. Lying to, giving false information to, and/or misleading school personnel 12. Misusing property belonging to others 13. Engaging in or causing disruptive behavior on the school bus 14. Inappropriate use of electronic technology (e.g., unauthorized audio/video recording) 15. Leaving class or school premises without permission of supervising school personnel	● Parent outreach and Intervention by counseling staff/teacher leader ● Guidance conference(s) ● Restorative Approaches Positive Behavioral Interventions and Supports (PBIS) ● Individual/group counseling ● Peer mediation ● Mentoring program ● Conflict resolution ● Collaborative problem solving ● Development of individual behavior contract ● Short-term behavioral progress reports ● Community service (with parental consent) ● Referral to a Community-Based Organization (CBO) ● Referral to appropriate substance abuse counseling services ● Referral to counseling services for youth relationship abuse or sexual violence ● Referral to counseling services for bias-based bullying, intimidation, or harassment ● Functional Behavioral Assessment	A. Admonishment by pedagogical school staff B. Student/teacher leader conference C. Reprimand by teacher leader D. Parent conference E. In-school disciplinary action (e.g., formal restorative conference, detention, exclusion from extracurricular activities, community separation or communal lunchtime) F. Removal from classroom by teacher (After a student is removed from any classroom by any teacher three times during a semester, a suspension must be sought if the student engages in subsequent behavior that would otherwise result in a removal by a teacher.)

	(FBA)/Behavioral Intervention Plan (BIP)	

Level 3 infractions: Disruptive behavior	*Range of possible guidance interventions*	*Range of possible disciplinary responses to be used in addition to guidance interventions*
16. Defying or disobeying the lawful authority or directive of school personnel or school safety agents in a way that substantially disrupts the educational process and/or poses a danger to the school community (this behavior does not include Level 1 or 2, uncooperative/ noncompliant or disorderly behavior, such as using profane language, 11; or bringing prohibited items to school, 3) 17. Entering or attempting to enter a school building without authorization or through an unauthorized entrance 18. Using slurs based upon actual or perceived race, ethnicity, color, national origin, citizenship/ immigration status, weight, religion, gender, gender identity, gender expression, sexual orientation, or disability	● Parent outreach ● Intervention by counseling staff ● Guidance conference(s) ● Restorative Approaches ● Positive Behavioral Interventions and Supports (PBIS) ● Individual/group counseling ● Peer mediation ● Mentoring program ● Conflict resolution ● Collaborative problem solving ● Development of individual behavior contract ● Short-term behavioral progress reports ● Community service (with parental consent) ● Referral to a Community-Based Organization (CBO) ● Referral to appropriate substance abuse counseling services ● Referral to counseling services for youth relationship abuse or sexual violence ● Referral to counseling	A. Admonishment by pedagogical school staff B. Student/teacher leader conference C. Reprimand by teacher leader D. Parent conference E. In-school disciplinary action (e.g., formal restorative conference, detention, exclusion from extracurricular activities, community separation or communal lunchtime) F. Removal from classroom by teacher (After a student is removed from any classroom by any teacher three times during a semester, a suspension must be sought if the student engages in subsequent behavior that would otherwise result in a removal by a

19. Shoving, pushing, or engaging in a minor altercation or similar physical confrontational behavior towards students or school personnel (e.g., pushing past another person), or throwing an object (e.g., chalk) or spitting at another person (for more serious physically aggressive behavior, see 30) 20. Bringing unauthorized persons to school or allowing unauthorized visitors to enter school in violation of written school rules 21. Tampering with, changing or altering a record or document of a school by any method, including, but not limited to, computer access or other electronic means 22. ***Engaging in vandalism, or other intentional damage to school property or property belonging to staff, students or others 23. Knowingly possessing property belonging to another without authorization 24. Violating the school's Internet Use Policy (e.g., use of the school's	services for bias-based bullying, intimidation, or harassment ● Functional Behavioral Assessment (FBA)/Behavioral Intervention Plan (BIP) ● Supports for Students Transitioning from Suspension: WUNYCS must provide appropriate support services to students returning from suspension to maximize their ability to meet social and academic standards within the school community. Support services may include any of the range of guidance interventions or a combination of services as best meets the needs of the individual student.	teacher.)

system for non-educational purposes, security/privacy violations) 25. Engaging in scholastic dishonesty which includes but is not limited to: a. Cheating (e.g., copying from another's work; using material during an assessment which is not authorized by the person giving the assessment; collaborating with another student during the assessment without authorization; knowingly using, buying, selling, stealing, transporting, or soliciting, in whole or part, the contents of an unadministered assessment; substituting for another student or permitting another student to substitute for one's self to take an assessment; bribing another person to obtain an assessment that is to be administered; or securing copies of the assessment or answers to the assessment in advance of the assessment)b. Plagiarizing (appropriating another's work and using it as one's own for credit without the required citation and attribution, e.g., copying written		

work from the Internet, or any other source) c. Colluding (engaging in fraudulent collaboration with another person in preparing written work for credit) 26. Posting or distributing libelous material or literature (including posting such material on the Internet)		

Level 4 infractions: Aggressive/injurious/harmful behavior	*Range of possible guidance interventions*	*Range of possible disciplinary responses to be used in addition to guidance interventions*
27. Engaging in sexual conduct on school premises or at school-related functions 28. Making sexually suggestive comments, innuendos, propositions or similar remarks, or engaging in non-verbal or physical conduct of a sexual nature (e.g., touching, patting, pinching, lewd or indecent public behavior, or sending or posting sexually suggestive messages or images) 29. Posting, distributing, displaying, or sharing	● Parent outreach ● Intervention by counseling staff ● Guidance conference(s) ● Restorative Approaches ● Positive Behavioral Interventions and Supports (PBIS) ● Individual/group counseling ● Peer mediation ● Mentoring program ● Conflict resolution ● Collaborative problem solving ● Development of individual behavior contract ● Short-term behavioral progress reports ● Community service (with parental consent)	D. Parent conference E. In-school disciplinary action (e.g., formal restorative conference, detention, exclusion from extracurricular activities, community separation or communal lunchtime) F. Removal from classroom by teacher (After a student is removed from any classroom by any teacher three times during a trimester, a suspension must be sought if the student engages in subsequent behavior that would otherwise result in a removal by a teacher.) G. Short Term Suspension for

literature or material containing a threat of violence, injury or harm, or depicting violent actions against or obscene, vulgar or lewd pictures of students or staff, including posting such material on the Internet 30. Engaging in physically aggressive behavior other than minor alterations as described under 19, which creates a substantial risk of or results in minor injury 31. Engaging in an act of coercion or threatening or instigating violence, injury or harm to another or others 32. **Engaging in or causing disruptive behavior on the school bus which creates a substantial risk of or results in injury 33. Engaging in harassing, intimidating and/or bullying behavior, including using electronic communication to engage in such behavior (cyber-bullying); such behavior includes, but is not limited to: physical violence; stalking; verbal, written, or physical conduct that threatens another with harm; seeking to coerce or compel a student or staff member to do something; hazing; taunting; exclusion from peer	● Referral to a Community-Based Organization (CBO) ● Referral to appropriate substance abuse counseling services ● Referral to counseling services for youth relationship abuse or sexual violence ● Referral to counseling services for bias-based bullying, intimidation, or harassment ● Functional Behavioral Assessment (FBA)/Behavioral Intervention Plan (BIP) ● Supports for Students Transitioning from Suspension: WUNYCS must provide appropriate support services to students returning from suspension to maximize their ability to meet social and academic standards within the school community. Support services may include any of the range of guidance interventions or a combination of services as best meets the needs of the individual student	1-10 days H. Suspension that results in immediate reinstatement I. Long Term Suspension M. Expulsion

groups designed to humiliate or isolate; using derogatory language or making derogatory jokes or name calling to humiliate or harass. Engaging in harassing, intimidating and/or bullying behavior, including using electronic communication to engage in such behavior (cyber- bullying) based on an individual's actual or perceived race, weight, religion, religious practices, gender, gender identity, gender expression, sexual orientation, or disability; such behavior includes, but is not limited to: physical violence; stalking; verbal, written, or physical conduct that threatens another with harm; seeking to coerce or compel a student or staff member to do something; hazing; taunting; exclusion from peer groups designed to humiliate or isolate; using derogatory language or making derogatory jokes or name calling to humiliate or harass. 34. Possessing controlled substances or prescription medications without appropriate authorization, illegal drugs, synthetic hallucinogens, drug paraphernalia, and/or alcohol 35. Falsely activating a fire		

alarm or other disaster alarm 36. Making a bomb threat 37. Taking or attempting to take property belonging to another or belonging to the school without authorization, without using force or intimidating behavior. (D-J only) 38. Creating a substantial risk of serious injury by either recklessly engaging in behavior, and/ or using an object that appears capable of causing physical injury (e.g., lighter, belt buckle, umbrella, or laser pointer) (D-M) 39. Causing a serious injury by either recklessly engaging in behavior, and/or using an object that appears capable of causing physical injury (e.g., lighter, belt buckle, umbrella, or laser pointer) 40. Inciting/causing a riot (G-M only) 41. **Possessing or selling any weapon 42. Using controlled substances or prescription medication		

without appropriate authorization, or using illegal drugs, synthetic hallucinogens, and/or alcohol.		

Level 5 infractions: Aggressive/injurious/harmful behavior	*Range of possible guidance interventions*	*Range of possible disciplinary responses to be used in addition to guidance interventions*
43. Starting a fire 44. Threatening to use or using force to take or attempt to take property belonging to another 45. Using force against, or inflicting or attempting to inflict serious injury against school personnel 46. Using extreme force against or inflicting or attempting to inflict serious injury upon students or others 47. Planning, instigating, or participating with another or others, in an incident of group violence 48. *Engaging in threatening, dangerous or violent behavior that is gang-related	● Parent outreach ● Intervention by counseling staff ● Guidance conference(s) ● Restorative Approaches ● Positive Behavioral Interventions and Supports (PBIS) ● Individual/group counseling ● Peer mediation ● Mentoring program ● Conflict resolution ● Collaborative problem solving ● Development of individual behavior contract ● Short-term behavioral progress reports ● Community service (with parental consent) ● Referral to a Community-Based Organization (CBO) ● Referral to appropriate substance abuse counseling services ● Referral to counseling services for youth relationship abuse or	I. Long Term Suspension j. Expulsion

49. Engaging in physical sexual aggression/compelling or forcing another to engage in sexual activity 50. Selling or distributing illegal drugs or controlled substances and/or alcohol 51. Possessing or selling any weapon, other than a firearm 52. Using any weapon to threaten or to attempt to inflict injury upon school personnel, students, or others 53. **Using any weapon, other than a firearm, to threaten or to attempt to inflict injury upon school personnel, students, or others 54. **Using any weapon, other than a firearm, to inflict injury upon school personnel, students, or others 55. **Possessing or using a firearm	sexual violence ● Referral to counseling services for bias-based bullying, intimidation, or harassment ● Functional Behavioral Assessment (FBA)/Behavioral Intervention Plan (BIP) ● Supports for Students Transitioning from Suspension: WUNYCS must provide appropriate support services to students returning from suspension to maximize their ability to meet social and academic standards within the school community. Support services may include any of the range of guidance interventions or a combination of services as best meets the needs of the individual student	

This structured discipline policy ensures that restorative practices and guidance interventions are prioritized while still maintaining clear consequences for disruptive or dangerous behavior. WUNYCS's approach focuses on student growth, accountability, and safety, fostering an equitable school environment where students can learn from their actions and

contribute positively to their community.

WUNYCS ensures that all disciplinary actions are carried out fairly, transparently, and in accordance with New York State (NYS) education law and federal due process requirements. The school follows a structured process to address student behavior while prioritizing restorative approaches and behavioral interventions over punitive measures. However, when disciplinary action is necessary, the school adheres to a clear sequence of procedures to protect student rights and maintain a safe and supportive learning environment.

Due Process Procedures for General Education Students

1. Informal Conference for Short-Term Disciplinary Actions
    - If a student exhibits behavior that warrants a short-term disciplinary action—such as detention, in-school suspension, or temporary removal from the classroom—they will receive oral or written notice of the infraction.
    - The student is provided an opportunity to explain their version of events before a decision is made.
    - Parents/guardians will be notified of the disciplinary action, and if necessary, a meeting with school administrators and teacher leaders may be scheduled to discuss the incident and next steps.

2. Formal Disciplinary Hearings for Long-Term Suspensions or Expulsions
    - If a student faces a suspension longer than five days or expulsion, they are entitled to a formal hearing.
    - The school provides written notice to the student and their parents/guardians detailing:
        - The specific charges against the student.
        - The date, time, and location of the hearing.
        - The student's right to representation (by a legal or non-legal advocate).
        - The right to present evidence and call witnesses in their defense.
        - The right to cross-examine any witnesses presented against them.
    - A hearing officer (appointed by the school) oversees the hearing and issues a recommendation based on the presented evidence and testimony.

3. Appeals Process
    - Parents or guardians have the right to appeal disciplinary decisions to ensure

fairness and compliance with NYS education law.
    - The first level of appeal is a school-based review conducted by the Principal or School Leadership Team.
    - If the outcome is disputed, an appeal may be escalated to the Board of Trustees, which will review the case.
    - Further appeals can be submitted to the New York State Commissioner of Education, whose decision is final.

Individuals Responsible for Implementing and Overseeing Discipline

- Teacher Leaders – Manage classroom behavior, implement restorative justice strategies, and intervene in minor infractions.
- Executive Director – Oversees all disciplinary actions, ensures due process is followed, and facilitates communication with parents.
- Hearing Officer – Conducts formal disciplinary hearings and makes recommendations for long-term suspensions or expulsions.
- Board of Trustees – Reviews and makes final decisions on disciplinary appeals when/if necessary.

WUNYCS is committed to fair and legally compliant disciplinary practices that uphold student rights while maintaining a safe and structured learning environment. We prioritize restorative and corrective interventions but ensure that any necessary disciplinary actions follow clear due process guidelines, allowing students and families to participate in a transparent, accountable process.

WUNYCS ensures that students who are suspended or expelled continue to receive educational services in compliance with New York State Education Law (§ 3214(3)(e)). For short-term suspensions of 10 days or fewer, alternative instruction begins within two school days and is provided in a format that maintains continuity with the student's regular academic schedule. For long-term suspensions or expulsions, instruction is provided consistently through one-on-one tutoring, small-group instruction, online learning platforms, or other approved methods to ensure students remain on track academically.

Instruction will be delivered by certified substitute teachers and cover core subjects such as Math/ELA. Depending on the student's needs, instruction may take place in person, remotely, or in a hybrid format. The school ensures that educational materials, assignments, and assessments remain aligned with grade-level expectations so that students continue to make academic progress. To support reintegration, school personnel review the student's progress upon returning from suspension, identifying any necessary academic interventions to ensure a smooth transition. By providing timely and structured alternative instruction, WUNYCS upholds its commitment to equity and access, ensuring that disciplinary actions do not hinder a student's long-term academic success.

Gun-Free Schools Act

Under the federal Gun-Free Schools Act (GFSA) and New York State Education Law (§ 3214(3)(d)), WUNYCS will enforce strict disciplinary measures for students found in possession of a firearm on school grounds. The law requires a mandatory one-year suspension (minimum of 12 months) for any student who brings a firearm to school or is found in possession of one. However, the Executive Director (as our school will not have a Superintendent in our model) has the discretion to modify this penalty on a case-by-case basis, considering factors such as the student's age, intent, disciplinary history, and any disabilities.

WUNYCS complies with the GFSA and state regulations by immediately conducting a formal disciplinary hearing for any student in violation of this policy. During this process, the student and their guardians receive written notice of the charges, the right to a hearing, and the opportunity to present evidence or seek legal representation. Additionally, law enforcement is notified, as firearm possession on school grounds is also a criminal offense under New York State law.

If a student with an Individualized Education Program (IEP) or 504 Plan violates the policy, a Manifestation Determination Review (MDR) is conducted to assess whether the behavior was related to their disability. Regardless of the disciplinary outcome, students removed under the GFSA are entitled to alternative instruction to ensure continued educational progress. By strictly adhering to federal and state mandates, WUNYCS maintains a safe and legally compliant school environment.

The 14th Amendment to the U.S. Constitution guarantees that no state shall deprive any person of life, liberty, or property without due process of law. This protection extends to public school students facing suspension or expulsion, as established in Goss v. Lopez, 419 U.S. 565 (1975). The Supreme Court ruled that students have a property interest in their education, meaning they cannot be suspended without procedural due process.

Due Process for Short-Term Suspensions (10 Days or Fewer)

For suspensions of 10 days or fewer, the Supreme Court determined that minimal due process is required:

1. Notice – The school must inform the student of the charges against them, either orally or in writing.
2. Explanation of Evidence – The student must be provided with an explanation of the evidence against them.
3. Opportunity to Respond – The student must have an opportunity to present their side of the story before a decision is made.

- These steps can occur immediately following the misconduct and do not require a formal hearing.
- A prior hearing is not necessary in cases where the student’s presence poses a danger to

others or an immediate disruption to the learning environment. However, the hearing must still occur as soon as possible after the removal.
- Parental notification must be provided, though parental involvement in the hearing is not required.

Due Process for Long-Term Suspensions (More Than 10 Days) or Expulsions

For suspensions exceeding 10 days or expulsions, students are entitled to greater due process protections, including:

1. Formal Written Notice – The school must provide the student and their parents/guardians with written notice of the charges and the proposed disciplinary action.
2. Right to a Hearing – The student has the right to a formal hearing where they can present their defense before an impartial decision-maker.
3. Right to Legal Representation – The student may be represented by an attorney or advocate at the hearing.
4. Right to Present Evidence and Witnesses – The student may call witnesses, present evidence, and provide testimony in their defense.
5. Right to Cross-Examine Witnesses – If applicable, the student may challenge evidence and testimony presented against them.
6. Written Decision – After the hearing, the school must issue a written explanation of the decision and any disciplinary action taken.

- Parental involvement is required for hearings involving long-term suspensions or expulsions.
- Students and families have the right to appeal the decision to the Board of Education or another governing authority.

Key Takeaways from Goss v. Lopez

- Education is a property right protected under the 14th Amendment, meaning schools cannot suspend or expel students without due process.
- Short-term suspensions require informal but immediate notice, explanation, and an opportunity to respond.
- Long-term suspensions and expulsions require formal hearings, legal representation, and an opportunity to present evidence.
- The level of due process increases with the severity of the punishment.

WUNYCS follows these 14th Amendment protections to ensure that all students receive fair and legal disciplinary procedures. We will provide clear communication, hearings when necessary, and opportunities for student defense to uphold constitutional due process rights in

all disciplinary actions.

Behavior as Communication

We believe that all behavior is a form of communication and that what may appear as an 'uncooperative' or 'disruptive' behavior is often a sign of an unmet need. When a child's needs for connection, autonomy, or purposeful engagement are not met, it may manifest in challenging behaviors.

At WUNYCS, our mission is rooted in the belief that all students, regardless of background or ability, deserve the support they need to thrive. In alignment with this vision, we take a proactive, relational approach to discipline, working to understand the underlying causes of behaviors and address them through supportive, developmentally appropriate interventions. Just as teacher leaders are trained to observe academic progress, they will also observe intently regarding social emotional well being and regulation of our students. While we remain committed to fostering a nurturing and inclusive environment, we also recognize that behaviors may occur. In those instances, we will rely on a consequence ladder adapted from our sibling school, Wildflower New York Charter School in the Bronx, to ensure consistent and thoughtful responses across all classrooms.

R-10c - Special Education Policy

c. Discipline Policy – Students with Disabilities

Maria Montessori's method was born from her work with students with disabilities, and her inclusive, child-centered approach was revolutionary in demonstrating that with the right environment, all children can learn and thrive. It is through this lens that we have crafted our responses to this section.

WUNYCS follows a restorative, rather than punitive, approach to discipline for all students, including those with disabilities. The school ensures that disciplinary actions align with federal and state regulations, including the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973, while also maintaining a safe and inclusive learning environment for all students. Under the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act, all teachers and school personnel responsible for implementing a student's IEP must have timely access to the document and be informed of their specific responsibilities regarding accommodations, modifications, and services. Teacher Leaders are mandated to read the IEP of an enrolling student prior to administering services- as such, they will read them prior to the first day of school and sign off on them. We will also hold individual family check ins of all students with IEP's prior to the first day of school to go over any clarification not otherwise noted in the IEP, get to know the family and their goals/wishes for their children, and form the first touchpoint of an ongoing partnership. Teachers will be knowledgeable of students IEP's, 504 plans, and any Behavioral Intervention Plans prior to the first day of school, having read and signed off on any/all documents.

Due Process and Disciplinary Considerations

Students with disabilities are subject to the same behavioral expectations as their peers, but the school considers individualized needs and legal protections when determining consequences. Teacher leaders will be well aware of behaviors that may manifest as a result of a student's disability. WUNYCS is committed to ensuring that students with IEPs are not unfairly targeted or disciplined in the same manner as students without disabilities when their behaviors are in fact a manifestation of their disability. Prior to any consequences, educators must ensure the students IEP plan was in place, they were receiving appropriate supports and services, and if they had a BIP- was it being followed. In accordance with federal and state law, including the Individuals with Disabilities Education Act (IDEA), students with disabilities receive individualized behavioral supports and interventions tailored to their needs.

Our discipline policy is designed to align with the Individualized Education Program (IEP) process while maintaining a positive, student-centered approach that upholds the principles of both Montessori education and legally required supports for students with disabilities. For students with a Behavioral Intervention Plan (BIP) included in their IEP, we ensure that all classroom teachers and relevant staff are fully informed and trained on the specific supports, accommodations, and interventions outlined in the plan. This includes individualized de-escalation strategies, sensory supports, and reinforcement systems to proactively address

behavior before disciplinary measures are needed.

Implementation and Teacher Knowledge:

1. Teacher Training & Awareness: All teacher leaders and assistants will receive professional development in behavior intervention strategies, trauma-informed practices, and restorative approaches to discipline. Teachers will also have direct access to a student's BIP and will meet regularly to review updates and implementation strategies.

2. Montessori & Positive Behavioral Supports: Our Montessori micro-school setting naturally reduces behavioral challenges through multi-age classrooms, individualized pacing, and hands-on learning, but when interventions are required, teachers will follow the BIP strategies before any disciplinary actions are taken.

3. Collaboration & Consistency: Teachers, support staff, and families will engage in ongoing collaboration through regular check-ins and progress monitoring meetings to ensure that the BIP is being implemented effectively and to make necessary adjustments.

4. Restorative and Inclusive Discipline Approach: If behavioral challenges arise, we prioritize restorative practices, positive reinforcement, and structured problem-solving discussions over punitive measures. Suspensions or removals would only occur as a last resort, and in full compliance with IDEA (Individuals with Disabilities Education Act) and New York State regulations regarding the discipline of students with disabilities.

By ensuring that teachers are knowledgeable about BIPs and that disciplinary measures do not conflict with a student's individualized supports, we create an inclusive, developmentally appropriate environment where students with disabilities are fully supported in their behavioral and academic growth.

If a student with an Individualized Education Program (IEP) or 504 Plan exhibits the highest level of infraction of our discipline 'ladder' (level 5) disruptive or dangerous behavior, the school follows a structured due process procedure, including:

1. Manifestation Determination Review (MDR)

    - If a student faces suspension exceeding ten days, removal from a program, or expulsion, an MDR meeting is convened to determine:
        - Whether the behavior was a manifestation of the student's disability.
        - Whether the student was appropriately placed and receiving adequate services.
        - Whether a behavior intervention plan (BIP) was in place and followed.

    - If the behavior was not a manifestation of the student's disability, the student

may face the same disciplinary consequences as general education students, with continued access to educational services.
    - If the behavior was a manifestation of the student's disability, the IEP team reconvenes to reassess the student's supports, placement, and intervention strategies.

2. Alternative Educational Services During Removal

    - Regardless of the disciplinary action, WUNYCS ensures access to Free Appropriate Public Education (FAPE) during any suspension or expulsion.
    - Students will receive assignments, additional instructional support, and accommodations to allow them to progress in the general curriculum and meet IEP goals, even if placed in an interim alternative educational setting.

3. Key Considerations Before Assigning Consequences

    - Before making any disciplinary decision that removes a student with a disability for more than ten days, WUNYCS will consider:

        - The student's age.
        - The student's disciplinary history.
        - The seriousness of the violation.
        - Whether the behavior threatened school safety.
        - Whether a lesser intervention would be effective.

Implementation and Oversight

- Teacher Leaders are responsible for documenting and implementing discipline policies, ensuring all actions align with restorative justice principles.
- The Executive Director oversees data collection and reporting, ensuring discipline is applied equitably across all demographic groups.
- Discipline data is reviewed biannually at Teacher Leader meetings and annually at the Board of Trustees meeting to track trends and identify any disproportionate disciplinary actions.

WUNYCS is committed to equitable, legally compliant discipline practices that support students with disabilities while maintaining a safe and inclusive learning environment. Through restorative justice, targeted interventions, and structured due process, the school ensures that all students receive the support and accountability needed to succeed.

WUNYCS is committed to maintaining a safe, inclusive, and supportive learning environment for all students. In alignment with the New York Dignity for All Students Act (DASA), the school will immediately address any incidents of harassment, discrimination,

bullying, cyberbullying, taunting, or intimidation that hinder a student's ability to learn.

No student shall be subjected to harassment by school employees or peers on school grounds or during school functions. Additionally, WUNYCS reserves the right to discipline students for off-campus behavior if such actions: 1. Disrupt the educational process, 2. Endanger the health or safety of students, or 3. Pose a reasonable threat to the well-being of the school community. This includes written or verbal harassment that substantially interferes with school operations or is reasonably expected to cause disruption. WUNYCS will take appropriate disciplinary action in accordance with its Discipline Policy to ensure a respectful and equitable educational environment for all students, where all students feel a sense of belonging and safety.

We are intentional and explicit in our decision to implement Montessori pedagogy because of its well-established, research-based effectiveness in supporting students with disabilities. The features of a Montessori classroom create an inclusive, responsive environment where students of all abilities can develop confidence, independence, and a sense of belonging. Our commitment to this approach reflects our core belief that every child deserves access to an educational model designed to meet them where they are and help them thrive.

R-10d - Dress Code Policy

d. Dress Code Policy

WUNYCS Dress Code Policy

Purpose

The purpose of this dress code policy is to foster a respectful, inclusive, and community-oriented environment where students can express their individuality while maintaining a focus on learning and shared values. It is our vision that all students feel comfortable and respected in their attire, which helps to create a sense of belonging.

General Guidelines

Inclusivity and Expression

- Students may wear clothing that reflects their cultural, religious, and gender identities, including hijabs, turbans, yarmulkes, and other faith-based attire.
- Cultural and religious hairstyles and coverings are fully permitted.

Non-Discrimination

- The dress code applies equally to all students, regardless of race, gender, sexual orientation, or religion.
- The school does not enforce policies that disproportionately impact any specific group of students.

Safety and School-Appropriate Attire

- Clothing should be appropriate for a school setting and should not disrupt learning or contain offensive imagery or language.
- Footwear must be worn at all times for safety reasons, with closed-toe shoes recommended for certain activities.
- Upon entering the prepared environment, students will switch into 'indoor footwear.' Many Montessori activities involve floor work, such as working with rugs or manipulatives, so soft, flexible indoor shoes make it easier for children to move without discomfort or restriction. By integrating indoor shoes into the school routine, Montessori classrooms foster independence, cleanliness, comfort, and focus, all of which align with Montessori principles of respect for self, others, and the environment.

Clothing Fit and Coverage

- Students should wear clothing that fully covers undergarments and midriffs.

Accessories

- Accessories: Simple accessories are allowed, but hats and caps as well as hooded sweatshirts (hoods worn over head) are not permitted indoors unless worn for religious or medical reasons.

General Appearance Guidelines

- Fit: Clothing should be well-fitting, neither excessively tight nor overly loose, allowing for ease of movement and safety within the classroom.
- It is strongly encouraged that children avoid wearing commercialized clothing (ie. cartoon characters from popular television and film). Montessori education emphasizes open-ended creativity rather than pre-scripted narratives from media franchises. Instead of wearing a specific character and adopting their persona, children are encouraged to invent their own stories, identities, and imaginative play scenarios. Montessori philosophy promotes simplicity and intentionality, discouraging excessive consumerism. Branded character clothing is often a product of aggressive marketing targeted at children, shaping their preferences based on commercial interests rather than their own natural curiosity. By avoiding character-branded clothing, Montessori classrooms help children develop autonomy over their interests without media-driven influence.
- We recognize that families may already have a variety of clothing for their children, including items featuring commercialized characters. While we strongly encourage students to wear simple, non-branded attire in alignment with Montessori principles (promoting focus, creativity, and a sense of community) this guideline will not be strictly enforced, but encouraged. Our goal is to create a calm and inclusive learning environment, and we appreciate families' support in making clothing choices that minimize distractions while allowing for personal comfort and expression.

Transparency and Communication

- The dress code policy will be available on the school website and shared with families at the beginning of the school year.
- The school will provide regular updates and address any concerns regarding dress code enforcement.

Student Involvement

- The school welcomes student input on dress code policies to ensure that the guidelines reflect their needs and concerns.
- Regular feedback sessions will be held with students and parents to review and update the policy as needed.

Enforcement

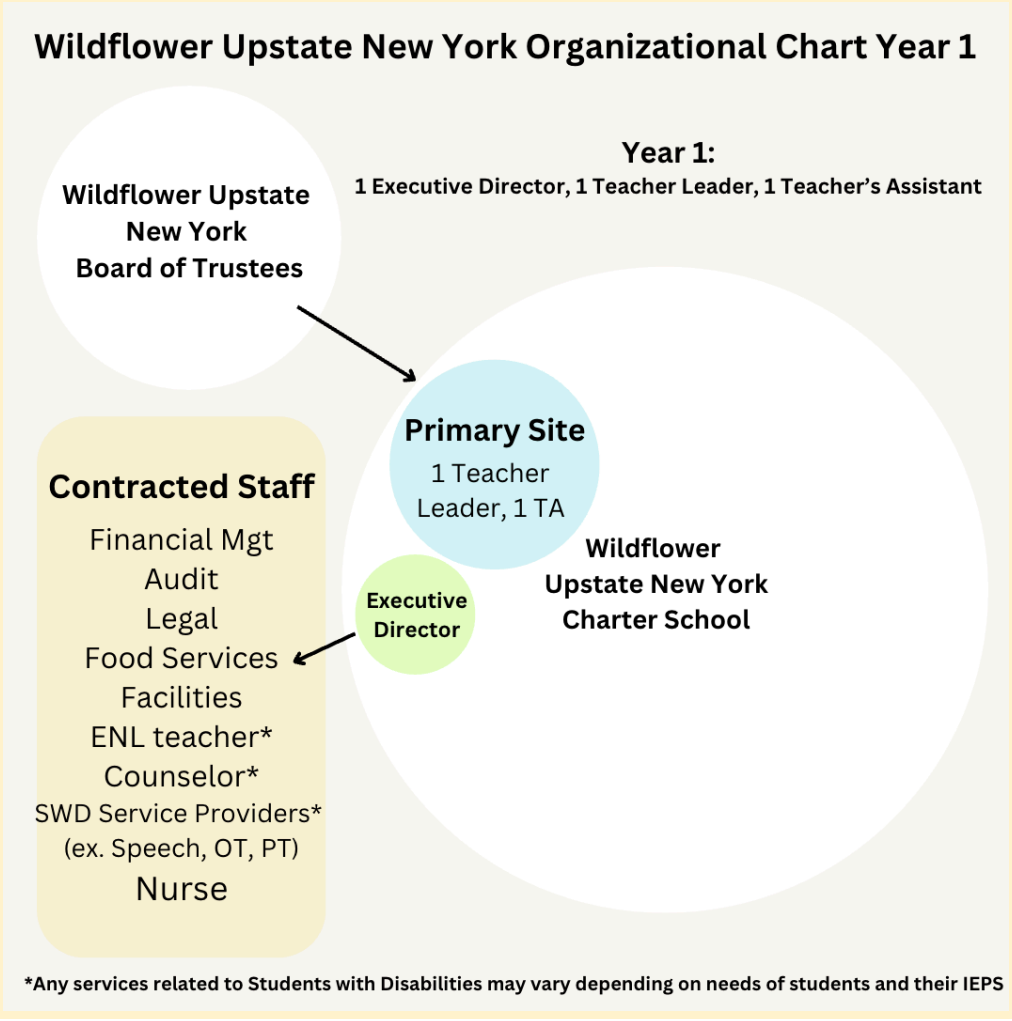
- Any reminders regarding dress code will be handled respectfully to maintain a positive school culture.
- Repeated or serious violations may result in a discussion with parents or guardians to find an appropriate resolution.

By following these guidelines, WUNYCS ensures a welcoming, inclusive, and professional learning environment, balancing individual expression with community values.

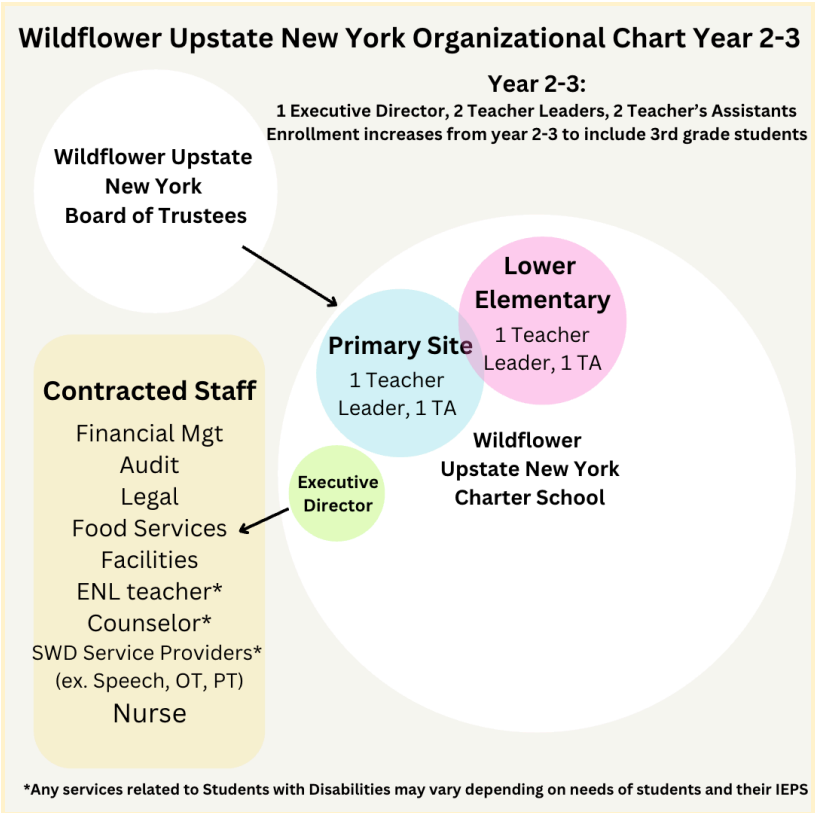
11. School Management and Leadership

a. Organizational Chart

We have included organizational charts that illustrate the school's projected growth from Year 1 through Year 7. While we recognize that SUNY CSI specifically requests charts for Years 1 and 5, we believe this expanded visual overview provides valuable context by depicting the school's year-by-year development through Year 5 and offering a forward-looking view of anticipated growth beyond that point. This comprehensive representation supports a clearer understanding of our long-term planning and operational scalability. Arrows in these charts signal direction of oversight. The name 'Wildflower,' signals partnership with Wildflower Schools Foundation.

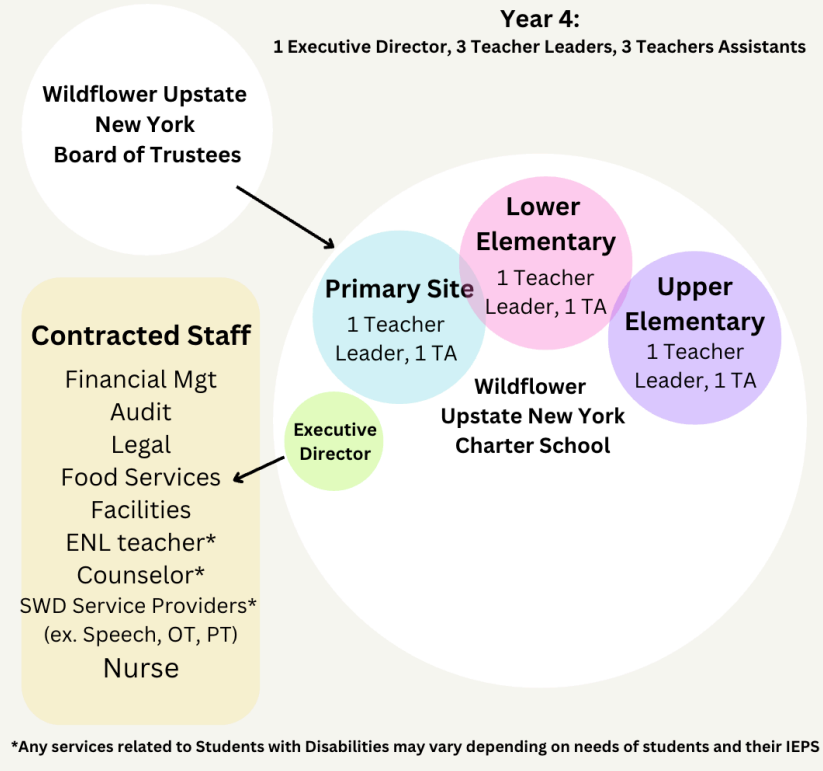


Wildflower Upstate New York Organizational Chart Year 2-3



*Any services related to Students with Disabilities may vary depending on needs of students and their IEPS

Wildflower Upstate New York Organizational Chart Year 4



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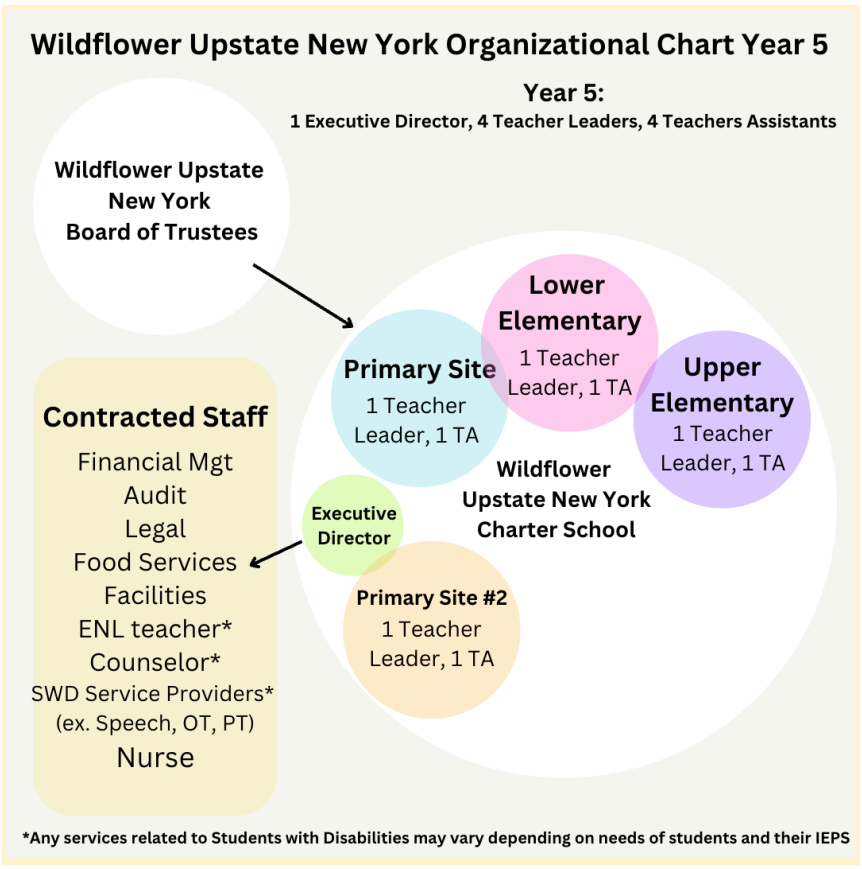
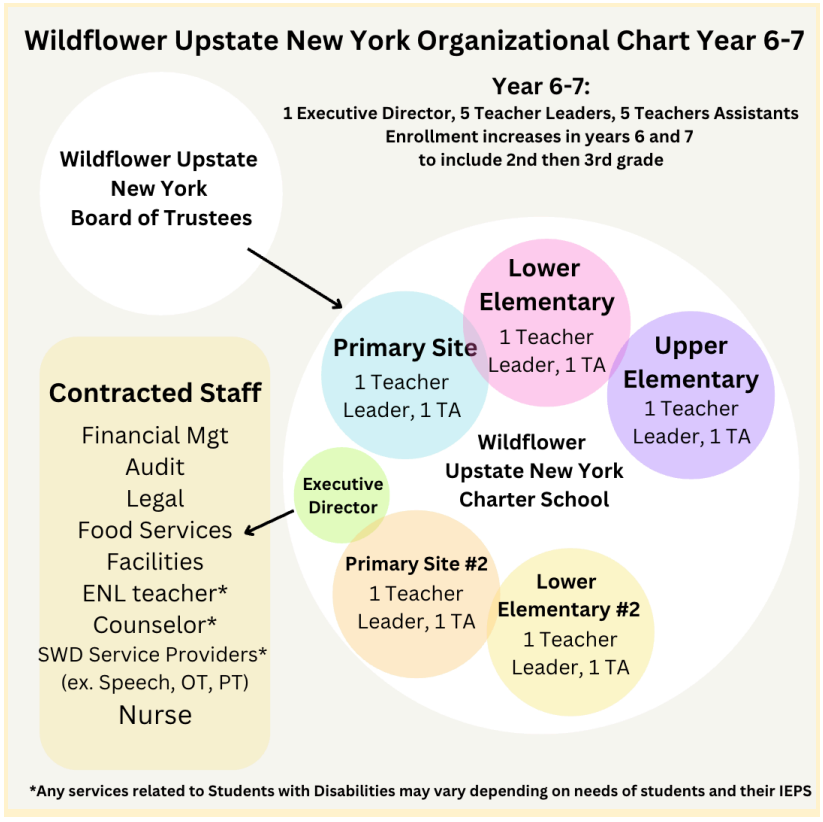

Wildflower Upstate New York Organizational Chart Year 5
Year 5:
1 Executive Director, 4 Teacher Leaders, 4 Teachers Assistants
Wildflower Upstate New York Board of Trustees
Lower Elementary
1 Teacher Leader, 1 TA
Primary Site
1 Teacher Leader, 1 TA
Upper Elementary
1 Teacher Leader, 1 TA
Wildflower Upstate New York Charter School
Executive Director
Primary Site #2
1 Teacher Leader, 1 TA
Contracted Staff
Financial Mgt
Audit
Legal
Food Services
Facilities
ENL teacher*
Counselor*
SWD Service Providers*
(ex. Speech, OT, PT)
Nurse
*Any services related to Students with Disabilities may vary depending on needs of students and their IEPS


Wildflower Upstate New York Organizational Chart Year 6-7
Year 6-7:
1 Executive Director, 5 Teacher Leaders, 5 Teachers Assistants
Enrollment increases in years 6 and 7
to include 2nd then 3rd grade
Wildflower Upstate New York Board of Trustees
Lower Elementary
1 Teacher Leader, 1 TA
Primary Site
1 Teacher Leader, 1 TA
Upper Elementary
1 Teacher Leader, 1 TA
Wildflower Upstate New York Charter School
Executive Director
Primary Site #2
1 Teacher Leader, 1 TA
Lower Elementary #2
1 Teacher Leader, 1 TA
Contracted Staff
Financial Mgt
Audit
Legal
Food Services
Facilities
ENL teacher*
Counselor*
SWD Service Providers*
(ex. Speech, OT, PT)
Nurse
*Any services related to Students with Disabilities may vary depending on needs of students and their IEPS

Our goals from year to year, as well as our growth beyond Year 5 will be guided by charter renewal coupled with the evolving needs and priorities of the community we serve. We have intentionally reserved space in these charts to reflect future expansion, while remaining committed to both community responsiveness and fiscal responsibility. Should we determine that a more accelerated growth trajectory better aligns with local demand or operational sustainability, we will engage in transparent dialogue with SUNY CSI and pursue any necessary material revision requests in accordance with authorizer expectations. We utilized our social media outreach to recruit with one classroom of just 16 students in mind, but received many questions for when/if we would accept older students. As such, we will be mindful of the community's interest in our growth model.

We will continue to grow intentionally within our micro-school model to ensure fiscal responsibility and minimize any potential financial impact on the Ballston Spa Central School District (BSCSD). This approach allows us to remain sustainable while meeting community needs, without placing undue strain on local resources.

b. School Leadership and Management Structure

WUNYCS's management practices and procedures are in line with Wildflower Schools distributed leadership practices. Schools are designed to prioritize Teacher Leader autonomy, strengthen community connections, and foster continuous organizational learning and improvement. Governance will be overseen by our Board that follows Wildflower School Foundation (TWF) processes to guide decision-making and ensure accountability.

The school will prioritize steady, intentional growth, launching with a single Primary classroom in its first year and expanding to a second Primary classroom by Year 5. At the core of our model are multi-age classrooms, which support a three-year developmental cycle and provide students with consistent, age-appropriate learning experiences tailored to their individual needs.

Decision-making at the school level will align with Authentic Montessori principles, particularly in the structure of its Primary classrooms. The school aims to integrate three- and four-year-olds into these classrooms with a separate pre-k program outside of this charter if approved. We will work with BSCSD in order to establish a pre-k program aligned with our communities needs and wants. This structured growth strategy, coupled with clear governance at the classroom, school, and board levels, will ensure that priorities are effectively set and key decisions support both academic excellence and the broader mission of the organization.

Like all Wildflower Schools, we will abide by a distributed leadership system that involves three subsections: the classroom-level structure and governance, the school-level structure and governance, and the board-level governance.

Classroom-level Structure and Governance

Each classroom will be led by a Teacher Leader and a Teacher's assistant. In alignment with the TWF model, Teacher Leaders will oversee all daily classroom operations, including instructional leadership, scheduling, outreach to parents, and building community partnerships that support the school's educational mission. Responsibilities will be divided using a structured "roles and responsibilities" process to ensure clarity and accountability in decision-making. A Teacher Leader at each site will manage all operational and instructional decisions. A Teacher Leader from each site will form a Leadership Committee with other sites as we expand, which oversees staff evaluations and works together for shared support in various aspects of school accountability and goal tracking.

Teacher Leaders have the flexibility to introduce additional roles at the classroom level as needed. For instance, if they determine that another staff member is necessary, they will be responsible for securing financial resources from their classroom budget and obtaining approval from the Board before proceeding with the hire. Additionally, when we receive a student who has teaching services on their IEP, Teacher Leaders will be legally mandated to hire a special education teacher.

School-level Structure and Governance

All classrooms will function as self-governing "pods" that collaborate to provide guidance, divide shared responsibilities, and optimize resource allocation. Based on experience with current TWF schools, pods generally operate most efficiently with 5 to 6 classrooms, at which point an additional pod is typically formed. During the first 5 years of the charter, Wildflower New York will operate with 4 classrooms which act as a single pod. As mentioned previously, one Teacher Leader from each classroom will make up what is known as the Leadership Committee. The Leadership Committee will take on responsibilities such as data analysis, scheduling classroom observations, and coordinating operations such as school schedules, transportation, any possible wrap-around care provided, etc. The Committee will employ self-management practices to determine priority initiatives, establish collaborative efforts, and designate leadership roles for specific activities.

Examples of Leadership Committee functions include:

1. Substitute Coordination: If the Committee identifies a need for a structured substitute teacher system, it will establish a Substitute Coordinator role. This individual will be responsible for maintaining a substitute list and managing the process for requesting substitute teachers. One Teacher Leader will be assigned to this role. Additional Committee members, such as a Teacher Leader designated the "Charter Site Coordinator" and or "Operations Coordinator", may contribute to fulfilling this responsibility. It will be the decision of the Leadership Committee to designate as needed various roles and coordinators to fulfill each role's responsibilities.

2. Transportation Management: A Transportation Manager role may be created to oversee

transportation policies and logistics. The person assigned to this role will be accountable for ensuring compliance with state transportation regulations and for developing clear communication channels to inform all school members about transportation solutions available for their campus. Additional roles will be determined by Teacher Leaders influenced by classroom roles and responsibilities and needs.

Board-Level Governance

The WUNYCS Board of Trustees will fulfill its oversight and governance responsibilities in accordance with its bylaws while incorporating self-management practices. To ensure accountability and effective governance, the Board will establish specific roles aligned with its statutory obligations and duty of care, assigning individual Board members to these roles as needed.

The Board will be structured into committees, starting with those mandated by its bylaws, followed by additional committees that reflect key areas of responsibility, such as finance, academic excellence, personnel, and community engagement.

A primary responsibility of the Board will be to act as a liaison between SUNY Charter Schools Institute (CSI) and WUNYCS, ensuring that the School's Leadership Committee fully understands and complies with all CSI requirements. The Board will also be responsible for communicating how these requirements are being met, facilitating a smooth transition between CSI guidelines and the school's operational framework.

Unique Governance and Management Processes

To effectively carry out its oversight responsibilities, the Leadership Committee will uphold the school's commitment to Wildflowers philosophy of 'radical transparency', ensuring that all Board of Trustees members have full access to key school data, including performance metrics, reporting systems, defined roles and responsibilities, established policies and processes, and any regulatory compliance-related decisions. Additionally, the Board will maintain a regular forum to discuss progress and challenges with the Leadership Committee and relay relevant insights to CSI. In turn, the Board will also practice radical transparency in its interactions with the Leadership Committee.

Another essential element of this self-managed governance model is Wildflower's "advice process", which requires all individuals holding decision-making roles to seek input from those who will be affected by their decisions. While decision-makers are not obligated to follow all advice received, this structured consultation process allows multiple stakeholders to provide perspectives, ensuring that decisions are made with broader community input. After making a decision, the individual must communicate both the outcome and the rationale behind it.

For the Board, this means that any Leadership Committee member is making a decision that the Board must communicate to CSI, that Leadership Committee member must first seek input from relevant stakeholders. Depending on the decision, these stakeholders may include

students, families, neighboring businesses, fellow Teacher Leaders, and Board members. By following this process, the Board can ensure that CSI requirements are properly conveyed to the Leadership Committee before policies or procedures are established. This approach enables the Board of Trustees to be more informed about school operations than in a traditional school model while also providing meaningful input on decisions—without unintentionally undermining the autonomy of school staff.

By implementing this process, Wildflower New York's Board of Trustees will have greater insight into school operations than a traditional school board, allowing them to contribute meaningfully without diminishing the autonomy of school staff.

Conflict Resolution in a Self-Managed Governance System

Additionally, self-managed governance includes a conflict resolution process as an alternative to hierarchical decision-making. In conventional models, disputes are typically resolved by authority figures in a hierarchy model making top-down decisions. However, within TWF organizations, conflicts are addressed through a structured resolution process that fosters open communication, strengthens self-management skills, and enhances both individual and collective problem-solving capacities. In a self-managed governance system, conflict resolution plays a critical role in addressing differences of opinion without relying on hierarchical decision-making.

Wildflower New York's Conflict Resolution Process

1. Direct or Facilitated Conversation: The first step in addressing a concern is for the individuals involved to engage in a direct conversation to seek a resolution. If they are unable to reach an agreement, any party may request the assistance of a mutually agreed-upon peer facilitator. TWF provides training for individuals interested in serving as facilitators for these discussions. In year one, the executive director will be trained as a facilitator.

2. Conflict Resolution Panel: If the issue remains unresolved after a direct or facilitated conversation, or if no peer facilitator is available, any participant may escalate the concern to the Board, which functions as the Conflict Resolution Panel. The Board will then review the issue and work towards an appropriate resolution.

At Wildflower New York, the Teacher Leaders serve as the primary administrators, supervisors, and instructional leaders within the school. They are responsible for all aspects of school operations and are organized either by classroom or within the Leadership Committee as we grow year to year. Teacher Leaders report directly to the Board of Trustees, ensuring that governance and decision-making remain closely aligned with the school's mission. The executive director serves as a liaison between the Board and Teacher Leaders, though Teacher Leaders may always escalate concerns to the board.

The Wildflower Foundation functions as a support organization rather than a governing

body. TWF provides the school with access to its full educational program, including instructional tools, training, and operational systems. While TWF upholds a strong commitment to the Montessori method and offers ongoing guidance to all Wildflower schools, key organizational decisions remain the responsibility of the Teacher Leaders and the Board.

WUNYCS will utilize the same decision-making rights as our sibling school, Wildflower New York Decision-Making Rights Matrix: The table below sets forth key decision rights between the Board and the leadership of the School. For each decision, the following table indicates the role of the Board and school leadership:

- Input (I) – Right to provide input to the decision
- Recommend (R)– Right to propose or recommend a decision
- Decide (D) – Right to make a decision
- Approve (A) – Right to approve a decision
- Notify (N) – Right to be notified of decision after it is made

Title abbreviations: BT= Board of Trustees, TLs = Teacher Leaders, organized by classroom or Leadership Committee

Category	Decision Type	BT	TLs
Mission and Vision	Mission, vision, theory of change	A & I	D & R
	Annual strategic priorities and goals	A & I	D & R
	Organizational chart	A & I	D & R
	School model and design (as described in approved charter)	A & I	D & R
Curriculum and Instruction	Annual instructional priorities and goals	A & I	D & R
	Instructional model (ongoing)	I	A & D
	Curriculum (ongoing)	I	A & D
	Student assessments	I	A & D
	Promotion requirements	A & I	D
	Promotion decisions		A & D
Performance Goals, Professional Development, Supervision and Evaluation	Teacher Leader performance goal setting and evaluation	N & I	A & D
	Staff performance goal setting and evaluation	I	A & D
	Professional development (annual schedule)	N & I	D
	Employee orientation, observation and feedback, staff discipline	I	A & D
School Culture	Academic calendar	A & I	D & R
	Setting, monitoring, and enforcing behavioral management systems and attendance and discipline policies	I	A & D
	Class size	N & I	A & D
	Updating and monitoring the	A & I	A & D

	Parent/student handbook		
	Assemblies and traditions	I	A & D
Student Programs	Special education & ELL model, services and contracts	I	A & D
	Programmatic partnerships	N & I	A & D
HR Policy and Processes	Compensation structure and scales, employee benefits and attendance	A & I	D & R
	Employee handbook	A & I	D & R
	Personnel records management	I	A & D
	Teacher Leader hiring	A & D & I	I
	Teacher/ staff hiring	N & I	A & D
	Onboarding new staff		A & D
Finance and Development	Annual budget	A & I	D & R
	Financial policies and procedures	A & I	D & R
	Fundraising plan	A & I	D & R
Outreach	All outreach -- marketing/branding strategy, staff recruitment, student recruitment, parent and community engagement, and partnership development	N & I	A & D
Operations	Usage of Student Information System/ Data management and collection	I	A & D
	Facility maintenance, food service, transportation, and emergency plan	I	A & D
	Insurance	A & I	D & R
	Purchasing and Procurement Policies	A & I	A & D
Compliance	Annual report	A & I	D & R
	State/Federal compliance & reporting	N & I	D & R
	Local Compliance & reporting	N & I	D & R

As described in the instructional leadership section of this RFP: Teacher Leaders will be the only 'staff management' positions at WUNYCS. Lead Applicant Courtney Murphy will assume the role of executive director if the charter is to be approved, but will not act as Teacher Leaders manager. Instead, executive directors in Wildflower schools act as liaisons between Teacher Leaders and the Board.

Teacher Leader Recruitment at Wildflower New York

WUNYCS offers a unique opportunity for educators to lead their own school campus, blending classroom teaching with the responsibilities of running a one-room schoolhouse. We will look for passionate Teacher Leaders who are eager to grow as educators while embracing leadership roles.

Desired Experience and Characteristics

1. Commitment to Montessori Pedagogy/Credentials

    - Candidates should have a strong dedication to the Montessori method. If they are not credentialed, we will provide pathways in which they may seek credentials.
    - Montessori training through an AMI or AMS-accredited center is encouraged, with prior Montessori teaching experience strongly preferred.
    - NYS Certification in Early Childhood Education (birth to grade 2) or Childhood

Education (grades 1-6) strongly preferred.

2. Dedication to Serving Diverse Communities

    - We seek educators who are committed to culturally responsive teaching, and those who have experience in inclusive classroom settings.
    - Candidates should have experience working with students with disabilities and a mindset for equitable outcomes for all students.

3. Special Education & English Language Learner (ELL) Experience (Preferred)

    - WUNYCS anticipates 20% of students will be identified as Students with Disabilities. There is a chance we may enroll English Language Learners (ELL) as well though the population is between 0-2%.
    - If any students to be enrolled have special education teaching requirements in the services listed on their IEP, at least one teacher leader to be hired should have SWD Birth-Grade 2 or SWD Grades 1-6 certification in New York State.
    - ELL certification is not necessary, though experience working with ELL's is also strongly preferred.
    - Candidates with public school teaching experience, especially in co-taught spaces, and a strong understanding of Common Core State Standards and state assessments will be prioritized.

4. Entrepreneurial Leadership

    - Teacher Leaders will manage both instructional and administrative duties.
    - We seek individuals with experience in school operations, budgeting, and leadership who are excited about the challenge of running a one-room schoolhouse.

5. Preferred Personal Qualities

    - Collaborative spirit and willingness to work closely with a co-teacher.
    - Strong work ethic, resilience, and a commitment to continuous learning.
    - Radical transparency and the ability to embrace self-management principles, including the advice process and structured conflict resolution.

Equal Opportunity Employer

Wildflower New York is an equal opportunity employer and does not discriminate based on race, ethnicity, sexual orientation, economic background, religion, national origin, gender, age, or disability. For more details on Teacher Leader roles, responsibilities, and selection criteria, please refer to the Instructional Leadership section within this RFP.

Wildflower New York is committed to attracting a diverse and representative group of candidates for leadership roles by implementing a robust and inclusive recruitment strategy. To connect with experienced Montessori educators, the school will partner with key organizations such as Montessori for Social Justice, the Association Montessori Internationale (AMI), the American Montessori Society (AMS), the Montessori Training Center Northeast, and the National Center for Montessori in Public Sector. Additionally, to ensure strong representation of candidates with special education backgrounds, Wildflower New York will collaborate with special education advocacy groups, teacher residency programs, and universities with well-established SPED training initiatives. Additionally, all vacancies will be publicly posted through WUNYCS social media, TWF, and other recruitment/job posting platforms such as Linkedin, with clearly stated minimum qualifications.

Expanding its reach, the school will post job openings on equity-focused platforms, including Diverse Educators, EdJoin, and hiring sites specifically dedicated to Montessori and special education roles. Actively participating in education conferences, Montessori training centers, and special education networking events will further strengthen recruitment efforts (job fairs aligned with local places such as Saratoga Bridges, AIM services, Head Start, etc). Additionally, WUNYCS will engage in community-based recruitment by working with local organizations, advocacy groups, and teacher preparation programs to identify candidates from historically underrepresented racial, ethnic, and socioeconomic backgrounds.

Ensuring a fair and bias-free hiring process is another critical focus for the school. To maintain transparency and consistency, all hiring rubrics will be aligned with the school's mission, Montessori philosophy, special education expertise, and commitment to culturally responsive teaching. The initial screening process will incorporate blind resume reviews, removing identifying information to mitigate implicit bias. Additionally, structured interviews will be conducted using standardized questions that assess candidates' instructional leadership, Montessori practices, special education knowledge, inclusion strategies, and self-management skills. Furthermore, candidates will be evaluated through real-world assessments, such as demo lessons, leadership case studies, and problem-solving exercises, to gauge their practical abilities.

WUNYCS is deeply committed to equity and inclusion in our school, which will be reflected in our teacher leaders. Additionally, we will actively create pathways for leadership development by mentoring and supporting teachers from underrepresented backgrounds who may not yet be credentialed in Montessori or certified in special education-but will work towards it within their first two years of being hired.

By embedding these equitable hiring policies and strategies, we ensure that our teacher leaders reflect the communities we serve while upholding a strong commitment to Montessori education and inclusive special education practices. We will also solicit feedback from candidates and stakeholders to refine and enhance recruitment strategies in each year as we expand across the first five years.

R-12ac - Personnel

a. Staffing Chart and Rationale

ADMINISTRATIVE PERSONNEL FTE	FTE					Description of Assumptions
Executive Management	1.0	1.0	1.0	1.0	1.0	Executive Director
Instructional Management	0.0	0.0	0.0	0.0	0.0	
Deans, Directors & Coordinators	0.0	0.0	0.0	0.0	0.0	
CFO / Director of Finance	0.0	0.0	0.0	0.0	0.0	
Operation / Business Manager	0.0	0.0	0.0	0.0	0.0	
Administrative Staff	0.0	0.0	0.0	0.0	0.0	
TOTAL ADMINISTRATIVE STAFF	1.0	1.0	1.0	1.0	1.0	
INSTRUCTIONAL PERSONNEL FTE						
Teachers - Regular	1.0	2.0	2.0	3.0	4.0	1 Teacher Leader in each setting (primary, lower, upper, second primary site)
Teachers - SPED	0.0	0.0	0.0	0.0	0.0	
Substitute Teachers	0.0	0.0	0.0	0.0	0.0	
Teaching Assistants	1.0	2.0	2.0	3.0	4.0	1 Teacher's Assistant in each setting (primary, lower, upper, second primary site)
Specialty Teachers	0.0	0.0	0.0	0.0	0.0	
Aides	0.0	0.0	0.0	0.0	0.0	
Therapists & Counselors	0.0	0.0	0.0	0.0	0.0	
Other	0.0	0.0	0.0	0.0	0.0	
TOTAL INSTRUCTIONAL	2.0	4.0	4.0	6.0	8.0	
NON-INSTRUCTIONAL PERSONNEL FTE						
Nurse	0.0	0.0	0.0	0.0	0.0	
Librarian	0.0	0.0	0.0	0.0	0.0	
Custodian	0.0	0.0	0.0	0.0	0.0	
Security	0.0	0.0	0.0	0.0	0.0	
Other	0.0	0.0	0.0	0.0	0.0	
TOTAL NON-INSTRUCTIONAL	0.0	0.0	0.0	0.0	0.0	
TOTAL PERSONNEL SERVICE FTE	3.0	5.0	5.0	7.0	9.0	

Wildflower Upstate New York follows a traditional Montessori model, where students are grouped into multi-age classrooms, known as grade bands, rather than single-grade levels. This approach promotes individualized learning, peer mentorship, and a three-year cycle of academic and social development. It also lends itself perfectly to our inclusive model, as the growing relationship between an educator and student across three years allows for deep learning of students' needs and supports. The school will include three grade bands: Primary (ages 3-5), encompassing an additional Pre-K (3K & 4K) if the charter is approved, and Kindergarten; Lower Elementary (ages 6-9), covering Grades 1-3; and Upper Elementary (ages 9-12), for Grades 4-6. In our first year, our offered grade band will shift slightly to account for an intentionally slow start, ensuring we are fiscally sound and have minimal impact on BSCSD's current budget. In year two and beyond we will follow an authentic Montessori grade band.

To ensure a strong instructional foundation, each grade band at Wildflower Upstate New York will be led by a dedicated instructional team consisting of a Montessori-credentialed lead teacher and a full-time teaching assistant (TA). This collaborative model supports shared responsibility, fosters a culture of peer leadership, and ensures the delivery of high-quality, student-centered instruction aligned with Montessori principles. In its first year, Wildflower Upstate New York will launch with 16 students across Kindergarten and 1st grade, served by one lead teacher and one TA, with the shared support of the Executive Director. By Year 2, the school will serve 24 students in Kindergarten through 2nd grade, with staffing increasing to two teachers and two TAs. In Year 3, the student body will grow to 32 students through 3rd grade, continuing with two instructional teams. The addition of a third classroom in Year 4 will accommodate 43 students through 5th grade, prompting the expansion to three teachers and three TAs. By Year 5, Wildflower Upstate New York will reach 59 students spanning Kindergarten through 6th grade. The school will be staffed by four teachers and four teaching assistants, with continued support from the executive director. This deliberate and measured expansion ensures

each classroom remains well-supported, preserving the integrity of the Montessori model while accommodating student growth. The Executive Director will oversee the region's network of one-room schoolhouses and serve as the liaison between teacher-leaders and the Board of Trustees, supporting programmatic consistency and long-term sustainability. If approved for our charter, we will seek a separate 501(c)(3) in order to establish a pre-k option in addition to our k-6 program, as so many of our families expressed a need for this.

This staffing structure ensures a high staff-to-student ratio, supports collaborative teaching, and upholds Montessori's commitment to self-directed, developmentally appropriate learning. By maintaining this framework, Wildflower New York will provide a nurturing and academically enriching environment tailored to each student's growth and success.

Rationale for Staffing Structure and Numbers

Wildflower New York's staffing model follows a self-managed governance structure, which places Teacher Leaders at the center of instructional and administrative decision-making. Each Primary, Lower Elementary (LE), and Upper Elementary (UE) classroom is staffed with 2 Teacher Leaders (one Montessorian and one Teachers Assistant), ensuring strong instructional leadership and student support. Additionally, the school anticipates that 20% of students will require special education services. If and when a student with an IEP requires co-teaching services in their IEP, the school will hire a NYS certified special education teacher. As necessary depending upon students' needs, we will also partner with BSCSD for other related services through the district (speech, OT, PT, for example).

Maintaining small class sizes with two adults in each classroom supports the core principles of the micro school model by fostering individualized attention, deeper relationships, and a more responsive learning environment. In the co-lead structure, the presence of a Montessori-credentialed teacher alongside a teaching assistant enables collaborative planning, differentiated instruction, and consistent student support. This model not only enhances instructional quality but also ensures we are living our mission and vision: that each child is known, nurtured, and engaged in a way that aligns with the developmental and academic goals of a Montessori microschool.

Comparative Salary Sources and Market Competitiveness

To ensure competitive compensation and attract highly qualified educators, Wildflower Upstate New York uses salary benchmarks from the Ballston Spa Central School District (BSCSD) and broader Montessori and special education markets.

- Teacher Leaders (Montessori-certified teachers) – A recently posted job offer in the capital region for a Montessori teacher in New York State was $59,000[57]. Our budget is in line with this number. This ensures that the school remains competitive in attracting and

[57] Indeed. (n.d.). *Jobs at City School District of Albany*. Retrieved March 31, 2025, from https://www.indeed.com/cmp/City-School-District-of-Albany/jobs?jk=4ea43794709e8c50&start=0&clearPrefilter=1

retaining highly trained Montessori educators.

- Teaching Assistants (TAs) – The average salary for a TA in BSCSD is approximately $28,000[58], ensuring that compensation for support staff remains in line with market rates. We increased this amount in our budget to remain competitive in attracting someone who wants to co-lead a micro-school, and potentially even begin the pathway towards Montessori credentials.
- Substitute Teachers – Wildflower Upstate New York will offer daily rates comparable to BSCSD's structure of $144 per day for certified substitutes and $118 per day for non-certified substitutes[59], ensuring an available pool of qualified educators when needed. In the first year, the executive director, a certified teacher in New York, may step in to substitute teach as needed while we work to build a pool of substitute teachers.
- We recognize our legal responsibility to fully implement any applicable student's IEP, including any mandated hours for special education teaching services. If a student qualifies for special education teaching services per their IEP, we will adjust our budget as needed to ensure those services are provided—whether through the hiring of a full-time NYS certified special education teacher or by contracting with the district if applicable. Depending on the student's needs, services may include consultant teaching, resource room support, integrated co-teaching (ICT), or direct, specialized instruction. The base salary for a special education teacher in BSCSD is $50,500. Teacher Leaders retain full autonomy over their budgets and will work closely with the Executive Director to determine the best approach for delivering services that meet the individual needs of students.
- Executive Director– To maintain leadership consistency and school oversight, the executive director role aligns with the average principal salary in BSCSD, which is $111,000[60]. Our budget reflects a slightly lower salary than this ($100,000), but still ensures our executive director is paid comparatively to other local directors/principals.

Alignment with the Staffing Chart

All positions listed in the application are reflected in the staffing chart, ensuring alignment with instructional, administrative, and student support needs. The staffing model has been designed to be scalable as the school expands, ensuring that additional Teacher Leaders and support staff are added as student enrollment grows.

By structuring salaries based on regional benchmarks and Montessori market rates, Wildflower Upstate New York ensures competitive compensation, staff retention, and high-quality education for its students. The school's commitment to self-management, equity,

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[58] Salary.com. (n.d.). *Teaching assistant salary at Ballston Spa Central School District*. Retrieved March 31, 2025, from https://www.salary.com/research/company/ballston-spa-central-school-district/teaching-assistant-salary?cjid=1582346

[59] Ballston Spa Central School District. (n.d.). *Human resources and professional development*. Retrieved March 31, 2025, from https://www.bscsd.org/departments/human-resources-and-professional-development/new-page

[60] Salary.com. (n.d.). *Principal salary at Ballston Spa Central School District*. Retrieved March 31, 2025, from https://www.salary.com/research/company/ballston-spa-central-school-district/principal-salary?cjid=1582295

and inclusive education is fully reflected in its staffing structure, allowing for a sustainable and effective learning environment.

In subsequent years, as necessary, at Wildflower Upstate New York the staffing structure will expand to include additional key operational and support roles to ensure the long-term sustainability and effectiveness of the school. These roles may include a school nurse, financial management staff, legal support, and facilities personnel, all of whom will be integrated into the budget based on competitive salary benchmarks.

- School Nurse – As student enrollment grows, a school nurse may be employed to provide health services, medication administration, and emergency response. The salary for this position is based on regional school district nurse averages, $38.55/hour.
- Financial Management – To ensure sound financial operations, compliance, and budget oversight, the school will add a finance manager or business administrator if needed.
- Legal Support – Given the complexities of educational compliance, special education laws, and charter school regulations, Wildflower New York would retain legal counsel through contracted services if necessary.
- Facilities Management – As the school expands, a facilities manager or support staff may be added to oversee building maintenance, safety protocols, and operational logistics.

The strategic addition of these positions ensures that Wildflower New York remains operationally efficient, compliant with state regulations, and well-equipped to serve its growing student population.

b. Qualifications and Responsibilities

Montessori Credentialed Teacher/Teacher Leader

This role offers a unique opportunity for Montessori educators to lead their own micro school, shape its culture, and drive its success, ensuring a transformative educational experience for students and families.

Qualifications

- Montessori Certification from an accredited AMI (Association Montessori Internationale) or AMS (American Montessori Society) training center, or similar program.
- Bachelor's degree or higher in Education, Child Development, or a related field.
- Experience in a Montessori classroom (preferred: 2+ years as a lead or assistant teacher).
- Commitment to authentic Montessori pedagogy, including multi-age classrooms, student-led learning, and hands-on materials.
- Strong classroom management skills that align with Montessori principles of independence, respect, and self-discipline.
- Understanding of inclusive education, with experience supporting students with diverse learning needs, including Special Education and English Language Learners.

- Passion for community engagement, fostering strong partnerships with families, educators, and the local community.
- Entrepreneurial mindset, with an interest in co-leading or founding a Montessori micro school.
- Willingness to take on both instructional and administrative responsibilities, supporting the self-management model of a micro school.
- Excellent communication and collaboration skills, with a commitment to working alongside a teaching partner and participating in school governance.

Responsibilities

- Lead a multi-age Montessori classroom, implementing authentic Montessori practices and fostering a child-centered learning environment.
- Develop individualized learning plans, observing and assessing students to ensure progress within the Montessori three-year cycle.
- Create a prepared Montessori environment, maintaining materials, designing engaging lessons, and ensuring alignment with Montessori philosophy.
- Support students' social-emotional development, fostering independence, conflict resolution, and a love of learning.
- Engage with families and the community, hosting regular parent education events, conferences, and outreach initiatives.
- Collaborate with co-teachers and assistants, as well as service providers, ensuring a cohesive learning experience and shared decision-making in a micro school setting.
- Participate in school leadership and governance, making instructional and operational decisions in alignment with the school's mission.
- Manage classroom operations, including budgeting for materials, maintaining compliance with charter school regulations in partnership with the executive director, and coordinating professional development.
- Mentor and support future educators and/or teaching assistants, contributing to the growth and sustainability of Montessori micro schools.

Teacher's Assistant/Future Teacher Leader

This role offers a unique opportunity for Teacher's assistants to co-lead their own micro school, shape its culture, and drive its success, ensuring a transformative educational experience for students and families. This role is ideal for an individual who is passionate about Montessori education, special education, and inclusive learning environments. The Teaching Assistant will play a vital role in fostering a nurturing, student-centered classroom where all children can thrive. If interested, there are possibilities to support teachers assistants on the path to Montessori credentials.

Qualifications

- High school diploma or higher (Associate's or Bachelor's degree in Education, Early

Childhood, Special Education, or a related field preferred)
- Level I, II, or III or pre-professional teacher assistant certification in NYS preferred
- Experience working with young children with disabilities (preferred: 2+ years in an inclusive, integrated, or special education setting).
- Knowledge of Individualized Education Programs (IEP's)
- Training or experience in child-centered, developmentally appropriate teaching methods, including Montessori, Reggio Emilia, or play-based learning (preferred but not required).
- Familiarity with evidence-based instructional strategies that support students with disabilities.
- Commitment to inclusive education, with experience supporting diverse learners, including children who are neurodiverse, multilingual, or have complex learning needs preferred.
- Strong collaboration skills, with experience working alongside speech therapists, occupational therapists, physical therapists, and other support staff.
- Excellent communication and family engagement skills, ensuring strong partnerships with caregivers and community stakeholders.
- Interest in assisting a Montessori credentialed teacher in co-leading the school, owning responsibilities as agreed upon that include administrative tasks.

Responsibilities

- With the guidance of the Montessori teacher leader, assist in implementation of individualized instruction, ensuring that children with disabilities receive high-quality, developmentally appropriate education.
- Provide differentiated instruction, adapting curriculum and teaching strategies to meet the unique needs of each child.
- Create an inclusive, nurturing classroom environment, integrating students with and without disabilities to foster social-emotional growth and peer interactions.
- Assess and document student progress, using observation, developmental assessments, and data-driven decision-making to inform instruction.
- Implement assistive technology and adaptive materials, ensuring accessibility for all learners.
- Prepare and maintain Montessori materials, ensuring an organized and accessible learning environment.
- Collaborate with related service providers, such as speech-language pathologists, occupational therapists, and behavioral specialists, to integrate therapies into daily instruction.
- Maintain compliance with state and federal special education laws, including IDEA (Individuals with Disabilities Education Act) and Section 504.
- Participate in professional development and school governance, contributing to the continuous improvement of the educational program and self-management model of the school.

c. Staff Recruitment and Retention

Wildflower Upstate New York is committed to equity, transparency, and diversity in its hiring practices. To build a team that reflects our values and the diverse communities we serve, we follow a standardized, bias-aware recruitment process designed to attract high-quality candidates from a broad, inclusive pool. All postings will include the following wording: "As an equal opportunity employer, Wildflower Upstate New York hires without consideration to race, religion, creed, color, national origin, age, gender, sexual orientation, marital status, veteran status or disability."

1. Standardized, Bias-Aware Hiring Process

To reduce common biases, such as "likeability bias," Wildflower Upstate New York follows a five-stage hiring process modeled after other successful Wildflower regions. Likeability bias is an unconscious bias in hiring and decision-making where candidates are evaluated based on how personable, charismatic, or relatable they seem, rather than their actual qualifications, skills, or experience. This bias can lead to favoring candidates who are more socially engaging or similar to the hiring team, even if they may not be the best fit for the role. Wildflower Upstate New York's process ensures objective decision-making, clear criteria for selection, and a structured evaluation of all candidates.

1. Creating Hiring Resources – Developing clear job descriptions, hiring criteria, and structured interview questions to ensure consistency.
2. Building a Strong, Diverse Candidate Pool – Expanding outreach through paid/free job postings, social media networks, and professional connections to attract a broad and diverse group of applicants.
3. Initial Review – Conducting paper screenings, and preliminary phone interviews based on pre-established criteria, ensuring fair evaluation at every step.
4. Interview Process – Implementing hiring exercises and structured interviews. This may include group conversations with current Wildflower Teacher Leaders from other locations (in year one) and Wildflower Upstate New York Teacher Leaders (past year one) and other key stakeholders to gain multiple perspectives.
5. Final Hiring Decision & Offer – Making objective, criteria-based hiring decisions, closing communication loops with all candidates, and completing HR processes.

2. Targeted Outreach to Underrepresented Communities

Wildflower Upstate New York actively seeks candidates from historically underrepresented backgrounds, ensuring a robust and inclusive hiring pool by:

- Posting job opportunities on equity-focused platforms, such as Diverse Educators, EdJoin, and Montessori-specific job boards.
  Partnering with special education networks, Montessori training centers, and teacher preparation programs that support diverse candidates.
- Leveraging social media, professional networks, and existing Teacher Leaders to spread

the word and encourage referrals from diverse communities.

3. Structured, Transparent Evaluation Criteria

To ensure fairness and objectivity in decision-making, Wildflower Upstate New York:

- Uses pre-established hiring rubrics aligned with the school's mission, Montessori philosophy, and special education expertise.
- Conducts blind resume reviews in the initial screening stage to reduce implicit bias.
- Implements structured interviews and hiring exercises, evaluating all candidates on the same set of performance-based criteria.

4. Commitment to Equity in School Leadership & Staff Development

- Establishes a diverse hiring panel, including Montessori educators, special educators, and community members, ensuring multiple perspectives in decision-making (in year 1), and including other Teacher Leaders from other classrooms in subsequent years.
- Offer anti-bias training for hiring teams to recognize and mitigate unconscious biases.
- Develops leadership pathways for underrepresented educators, providing mentorship and professional development opportunities to promote career growth. For example, those not yet Montessori credentialed may work towards accreditation with Wildflower Schools.

By embedding these transparent, structured, and inclusive hiring policies, Wildflower Upstate New York ensures that teachers and staff reflect the communities they serve while maintaining a high standard of excellence in Montessori and special education.

Wildflower Upstate New York recognizes the availability of highly qualified Montessori educators. Upstate New York is home to several independent Montessori programs, all of which employ AMI- and AMS-credentialed teachers. This existing network provides a strong talent pool of experienced educators who are well-versed in Montessori pedagogy and prepared to lead multi-age classrooms. Unlike traditional school settings, where advancement often requires leaving the classroom for administrative positions, Wildflower Upstate New York allows teachers to lead and co-manage their school sites while remaining dedicated to direct student engagement. By fostering social entrepreneurship within the school community, educators experience continuous professional growth while maintaining their role as classroom leaders. This model encourages teachers to stay invested in their school and students, reducing turnover caused by limited career progression opportunities. Our retention efforts are further supported by our self-managed Paid Time Off and Leave Policy (see more in section R-12d-Personnel Policies), which empowers educators to make responsible decisions regarding their own time off while ensuring operational continuity and compliance with employment laws. By valuing both instructional excellence and the well-being of our teachers, we foster a healthy, resilient school culture that benefits students and adults alike.

To recruit certified Montessori teachers, the school will actively engage with local

Montessori programs and training centers, leveraging relationships with experienced educators who may seek new leadership opportunities within the Wildflower model. Typically the only way 'up' in a hierarchical school model is to leave the classroom and become an administrator. However, our unique model allows teachers to stay in the classroom as well as become a leader. We find this unique opportunity will attract several qualified candidates. Additionally, partnerships with regional special education certification programs through local colleges/universities to help with recruitment of qualified and experienced teachers assistants, addressing the anticipated need for educators skilled in supporting students with disabilities.

Understanding the variability in talent distribution across Upstate New York, Wildflower Upstate New York will offer pathways for educators to obtain Montessori credentials while working in the school, ensuring long-term sustainability. By tapping into existing independent Montessori schools, teacher preparation programs, and broader educator networks, Wildflower Upstate New York will secure highly qualified staff who align with the school's mission and commitment to inclusive, child-centered education.

Wildflower Upstate New York prioritizes teacher retention by offering a unique career pathway that allows educators to grow within the classroom rather than having to leave teaching for administrative roles. In the Wildflower model, teachers operate as Teacher Leaders, co-leading their schools in a non-hierarchical, decentralized structure where they have both instructional and administrative responsibilities. This autonomy and shared leadership model attracts educators who seek greater professional agency, collaboration, and long-term career sustainability. Additionally, for teachers who have children of age to attend the school, we plan to utilize set asides for enrollment of their children. Further information on this is listed in R-05d-Admissions Policy. We also plan to retain high-quality educators through individualized support and robust professional development opportunities, ensuring that teachers are continuously learning, growing, and refining their practice. Through peer collaboration, mentorship, and access to Wildflower's broader network, teachers receive ongoing training in Montessori best practices, inclusive education strategies, and leadership development. By offering teacher-driven leadership, professional autonomy, and meaningful career growth, Wildflower Upstate New York creates a fulfilling and sustainable teaching environment, ensuring that dedicated, high-quality educators remain engaged in their roles for the long term.

Lastly, Wildflower Upstate New York is committed to compensating our teachers competitively to reflect the skill, expertise, and leadership they bring to our school community. Our Teacher Leaders take on both instructional and administrative responsibilities, and their salaries will be aligned with or exceed regional benchmarks to ensure we attract and retain high-quality Montessori and special education educators. By offering fair, sustainable, and competitive salaries, along with professional development opportunities and leadership autonomy, we create a work environment where educators feel valued, supported, and empowered to stay and grow within our school.

R-12d - Personnel Policies

d. Personnel Policies

WUNYCS Personnel Policies

WUNYCS is committed to fostering a safe, equitable, and legally compliant work environment while ensuring adherence to all applicable state and federal employment laws and regulations. The proposed personnel policies include fingerprint-supported criminal background checks, receipt of the Code of Ethics, Conflict of Interest Policy, and Whistleblower Policy, as well as comprehensive compliance with all relevant employment and anti-discrimination laws.

At-Will Employment & Hiring Process at WUNYCS

WUNYCS follows an at-will employment policy, meaning that employees and the school may terminate employment at any time, with or without cause. However, in certain cases, the Board may choose to establish employment contracts for specific roles that fall outside of the at-will framework.

Each Wildflower shopfront classroom is co-led by two Teacher Leaders, who oversee both instructional and administrative responsibilities. When additional staff—such as paraprofessionals, special education support personnel—are required, Teacher Leaders will identify and recruit individuals who align with Wildflower's mission and values.

All open positions will be publicly posted with a clear job description and minimum qualifications. Every job listing will explicitly state:

> "WUNYCS is an equal opportunity employer and does not discriminate based on race, religion, creed, color, national origin, age, gender, sexual orientation, marital status, veteran status, or disability."

To ensure a fair and structured hiring process, WUNYCS follows these steps:

1. Application Submission – Prospective employees must submit a resume and cover letter for the desired position.
2. Interview Process – Candidates will participate in structured interviews to assess their skills, alignment with Montessori principles, and cultural fit within the school.
3. Reference Checks – References will be thoroughly reviewed to verify candidates' qualifications and experience.
4. Employment Offer – Selected candidates will receive a formal offer letter outlining:
    - Position title
    - Salary
    - Confirmation of at-will employment status

    Acceptance of the offer indicates agreement to all WUNYCS personnel policies.

5. Fingerprinting & Background Check – All employees must complete fingerprint-supported background screening before officially joining the school.

Employment Status & Legal Requirements

Regardless of whether an employee is full-time or part-time, they will receive a formal employment letter detailing their role. WUNYCS will verify that all employees are legally eligible to work in the U.S., requiring the completion of an I-9 form and any other necessary documentation. By maintaining a transparent and structured hiring process, WUNYCS ensures that all employees are highly qualified, legally compliant, and aligned with the school's values and mission.

Staff Evaluation Process

WUNYCS will implement a staff evaluation system that aligns with its self-management model, ensuring continuous growth and accountability. The evaluation process will include functional and pedagogical reviews, with structured self-assessments and input from colleagues, families, and the broader school community.

- Self-Evaluations will take place twice per year, at the end of the calendar year and in late spring. Staff members are expected to complete their review within these windows or may use the advice process to adjust the timing.
- Evaluations will incorporate classroom data, teaching benchmarks, and peer feedback to ensure a well-rounded review process.
- Spring Evaluations will serve as a point for staff to determine their intent to return for the following year.
- A Review Committee, composed of 3-4 Teacher Leaders or Leadership Committee members, will assess self-evaluations, reviewing data and feedback. If a discrepancy arises between a staff member's decision and their performance review, the conflict resolution process may be initiated.
- The Board of Trustees will oversee final decisions and may also initiate the conflict resolution process if necessary.

Mandated Reporting Responsibilities

All employees at WUNYCS are legally required to report suspected child abuse or neglect, even if they are unsure whether it is occurring. Reports must be made immediately in any instance where there is reasonable suspicion. Additionally, staff are required to report suspected abuse that occurs in an educational setting, including school buildings, school transportation, or at school-sanctioned events.

Confidentiality Policy

All employees must safeguard student records and personal information in compliance with:

- The Family Educational Rights and Privacy Act (FERPA)
- The Individuals with Disabilities Education Act (IDEA)
- New York State privacy laws

Student information may only be disclosed with the explicit consent of the designated Confidentiality Coordinator and must be legally permitted.

- All records will be securely stored, with access limited to individuals with a legitimate educational or administrative need.
- Employees with access to social security numbers or other sensitive staff information must keep it confidential, except when required for business or legal purposes.

School Calendar & Weather-Related Closures

WUNYCS will publish a new school calendar annually, ensuring compliance with New York State Education Law regarding student attendance.

- In cases of severe weather or emergencies, the school may close or adjust its schedule.
- Parents and staff will be notified promptly using a designated communication system.
- If Ballston Spa Central School District schools are closed due to weather or emergencies, WUNYCS will automatically close as well.

Compliance with Fingerprint-Supported Background Checks & Ethical Standards

WUNYCS follows strict personnel screening procedures to ensure student and community safety.

- Fingerprint-Supported Criminal Background Checks – All faculty, staff, independent contractors, and substitute teachers, as well as consultants and volunteers with regular and ongoing contact with students, will be required to pass a fingerprint-supported criminal background check prior to employment. This measure ensures compliance with New York State Education Department (NYSED) and federal regulations regarding the safety screening of school personnel.
- Code of Ethics – Each employee will receive a Code of Ethics document, which outlines professional expectations, integrity standards, and ethical responsibilities within the school community.
- Conflict of Interest Policy – Employees will be required to review and acknowledge the school's Conflict of Interest Policy, ensuring transparent decision-making and the avoidance of conflicts between personal interests and professional responsibilities.
- Whistleblower Policy – WUNYCS strictly enforces a Whistleblower Protection Policy, which ensures employees can report concerns regarding unethical behavior, policy violations, or financial misconduct without fear of retaliation. This policy aligns with New York State Not-for-Profit Corporation Law §715-b, which mandates protections for

individuals who report misconduct in good faith.

Non-Discrimination Compliance

In compliance with Title IX (Education Amendments of 1972, 20 USC § 1641, 34 CFR § 106.9) – WUNYCS ensures equal opportunities in employment and education, explicitly prohibiting discrimination on the basis of sex or gender. This includes:

- Fair hiring and compensation practices ensuring gender equality.
- A commitment to preventing and addressing sexual harassment and gender-based discrimination within the workplace and school environment.
- Training staff on Title IX policies and procedures to maintain a discrimination-free environment.

- Title IX Coordinator & Contact Information – WUNYCS will appoint a Title IX Coordinator to oversee Title IX compliance and investigations. This individual will be responsible for:

    - Ensuring that staff, students, and families have access to information regarding their rights under Title IX.
    - Investigating and addressing Title IX-related complaints in accordance with federal regulations.
    - Implementing preventative training programs to promote gender equity within the school.

The school will publicly list the Title IX Coordinator's name, office address, and telephone number in all official personnel documentation, ensuring accessibility for all staff and community members once assigned. This person will either be the executive director or board chair, subject to approval as coordinator once the charter is approved.

Commitment to State & Federal Employment Laws

WUNYCS upholds all applicable federal and state labor laws, ensuring a fair and legally compliant work environment.

- Americans with Disabilities Act (ADA) – WUNYCS ensures compliance with ADA regulations, providing reasonable accommodations for employees with disabilities to enable them to perform essential job functions.
- Family and Medical Leave Act (FMLA) – Employees will be eligible for protected leave under FMLA for qualifying family or medical needs, including personal illness, parental leave, or care for a family member.
- New York State Labor Laws – The school complies with all state employment laws, including those related to workplace safety, minimum wage, overtime, and employee rights.
- Retirement & Benefits – The school will provide a competitive benefits package that

includes medical, dental, and vision insurance, as well as a 401k or 403B retirement plan, with the goal of matching employee contributions up to 4%, subject to school funding availability.

- Paid Time Off & Leave Policies – WUNYCS follows a self-managed leave policy, allowing employees to make responsible decisions regarding time off while ensuring continuity in school operations and adherence to employment laws.
- Workplace Safety & OSHA Compliance – The school ensures compliance with Occupational Safety and Health Administration (OSHA) standards, requiring a safe working environment for all employees. Staff will receive training on emergency procedures, fire safety, and first aid protocols.
- Whistleblower & Ethical Reporting Protections – Employees are encouraged to report any concerns about unethical behavior, discrimination, or legal violations without fear of retaliation, in accordance with state and federal whistleblower protections.

By integrating these personnel policies and compliance measures, WUNYCS ensures a safe, inclusive, and legally sound working environment for all employees while promoting diversity, equity, and ethical leadership in education.

Disability Leave Policy

Employees who experience a non-work-related illness, injury, or pregnancy may be eligible for short-term disability insurance, in accordance with legal requirements. This coverage applies to employees who are unable to work for more than seven consecutive days due to their condition.

Employees must notify the executive director as soon as possible if they require disability leave and must provide written medical documentation from a doctor confirming the need for leave. Disability benefits are calculated as a percentage of the employee's salary and may extend for up to 26 weeks, during which time the employee will continue to receive medical coverage. The executive director must be kept informed of the employee's expected return date and any updates regarding their condition. Before resuming work, employees are required to submit a doctor's clearance certifying their ability to return.

Employee Probation, Suspension, and Dismissal Policy

If performance or conduct concerns arise, WUNYCS will take appropriate steps to assess and address the situation. This may involve corrective action, disciplinary measures, or termination when there is just cause. In certain cases, the Board may place an employee on administrative leave, either with or without pay and benefits, while an internal investigation is conducted.

Exit Interviews

All employees will be encouraged to participate in an exit interview when leaving

WUNYCS, regardless of the circumstances. These interviews will be conducted by the designated Exit Interviewer to gather constructive feedback and support continuous improvement within the school community.

Workplace Safety and Conduct Policies

Workplace Violence Prevention

Ensuring a safe and respectful workplace is a priority at WUNYCS. Employees are strictly prohibited from engaging in threatening, aggressive, or violent behavior. This includes, but is not limited to:

- Possessing weapons, such as firearms or knives, on school property or while conducting school-related activities.
- Engaging in physical violence, threats, or intimidation toward supervisors, colleagues, students, visitors, or anyone associated with the school.

Reporting and Prevention

- Any potentially dangerous behavior or policy violations must be reported immediately to the Executive Director/designated Board member for investigation.

- Reports will be handled confidentially, ensuring the safety and privacy of those involved.

- Employees should remain vigilant and report any signs of hostility, aggressive behavior, or discussions about weapons to the Executive Director/designated member of the board.

Policy Enforcement

- Violations of this policy will result in disciplinary action, up to and including suspension or termination.
- Serious threats or violent actions may be reported to law enforcement for further action.

Emergency Procedures

All staff must familiarize themselves with emergency protocols and fire safety measures. Employees are responsible for:

- Reporting fires or emergencies to the Workplace Safety Coordinator or emergency personnel.
- Participating in first aid and CPR training, when provided.

- Immediately reporting injuries or accidents to ensure appropriate medical care is provided.

In the event of a severe emergency (e.g., lockdown or evacuation), employees should call 911, provide details, and remain at the scene to assist as needed. Additional emergency response procedures are outlined in the Employee Handbook, which will be provided to all staff.

Drug-Free Workplace Policy

WUNYCS maintains a drug-free work environment. The possession, use, sale, or distribution of controlled substances is strictly prohibited on school premises, at school-sponsored events, or in any situation that affects the school community.

- Employees suspected of being under the influence of drugs or alcohol while on duty may be required to undergo testing.
- Test results will remain confidential, but a positive result may lead to termination or a requirement to complete a rehabilitation program as a condition of continued employment.

Smoke-Free Workplace

All WUNYCS facilities are designated smoke-free environments. Smoking is strictly prohibited inside school buildings, on school grounds, and at all school-related activities.

By implementing these policies, WUNYCS ensures a safe, respectful, and professional work environment for all employees.

R-13a - Partner Organizations

a. Partner Information

Partnership with TWF

WUNYCS plans to collaborate with The Wildflower Foundation, leveraging TWF's expertise in supporting small, high-quality Montessori schools. Our point of contact throughout our application phase has been Erin Quigley (she/her), Director of Charter Design and Replication: Wildflower Schools ([redacted]).

WUNYCS is part of the broader Wildflower Schools network, which has a demonstrated track record of successfully launching and supporting high-quality Montessori micro-schools. The organization's ability to operate in New York State is evidenced by the existing Wildflower New York school in the Bronx, which is authorized by SUNY CSI. Wildflower New York Charter School has been successfully running as a public charter Montessori school and is currently undergoing its five-year renewal process. The school reflects the school's successful implementation of the Wildflower model within New York's regulatory framework, demonstrating the organization's capacity to comply with state educational standards, governance requirements, and operational best practices. Through its existing presence in New York City, Wildflower has established systems, partnerships, and compliance measures that will support the successful launch and operation of WUNYCS, further reinforcing the organization's ability to expand and sustain its mission-driven approach in the state.

The founders of the school are committed to creating an innovative public Montessori program and were drawn to TWF's dedication to expanding Montessori education in the public sector, particularly through charter school models. Lead applicant Courtney Murphy, who has over a decade of experience in charter schools, strongly supports school choice and believes in the transformative potential of bringing Montessori education to the public sector. Currently, in Upstate New York, all authentic Montessori schools operate as independent, tuition-based institutions, making them largely inaccessible to many families. A public charter school would close a gap, providing equitable access to a Montessori education for a broader and more diverse student population. In seeking a partner organization, Murphy prioritized alignment with the mission and vision of her proposed school—particularly in its commitment to inclusion. Wildflower's stated purpose of "liberatory education" and freedom from oppression, along with its core principles, beliefs, and community norms, directly aligned with her vision for a future school in her hometown. Lastly, Courtney wanted to create a community embedded school that catered to students with disabilities, thus remaining small in size. Wildflower's emphasis on micro-schools aligned perfectly with this vision. With this in mind, Murphy joined a 10-week charter school expansion cohort to gain a deeper understanding of the authorization process and the potential for partnership with Wildflower.

The 10-week cohort, led by TWF's Director of Charter Expansion, Erin Quigley, provided structured guidance on key aspects of charter school development, including demographic

research, budgeting, charter law, and community engagement aligned with each participant's prospective location. Participants, including Courtney Murphy, engaged in virtual sessions with Erin alongside a cohort of like-minded educational entrepreneurs from across the country, all seeking to establish public Montessori charter schools in their respective states. At the conclusion of the cohort program, the next phase involved individualized consultation sessions with Erin, tailored to each participant's state-specific charter application process. Courtney knew the best next step was to continue learning more, and began having weekly one on one zoom sessions with Erin. Erin also facilitated informational Zoom sessions with both the application team and proposed Board-introducing them to Wildflower's purpose, beliefs, and current school models. On occasion other TWF members provided targeted support. These sessions focused on application requirements, community engagement strategies, and financial planning. Recognizing the complexity of financial projections, Courtney sought additional guidance on budget development, ensuring all financial assumptions and calculations aligned with state requirements and best practices. Each week, she and Erin reviewed progress on key aspects of the application in adherence with a projected timeline of completion, including Courtney's community outreach strategies, social media presence, and compliance with New York's charter school application guidelines, ensuring a well-informed and strategic approach to launching the proposed school.

The Wildflower Foundation primarily functions as a support entity, offering training and resources to Teacher Leaders as they develop and lead their own Montessori schools. TWF's philosophy emphasizes Teacher Leaders having direct decision-making authority, reporting directly to the School's Board rather than operating under traditional centralized management. There are currently no charter schools within Ballston Spa Central School District. At this time, TWF remains our school's sole official partner, though we will seek community partnerships upon approval of our charter and have begun communication in regards to this. We have discussed prospective partnerships with Ballston Area Community Center (potentially utilizing their space- renting the gym for big events for example), Ballston Area Recreation Center (partnering with their coaches and/or teachers to have a monthly visitor lead a session with our students), and The Ballston Spa Public Library (seeking to have visits to their library and perhaps visitors to do story time at our school). These conversations will continue through community outreach in the summer of 2025.

b. Partner Commitment

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WILDFLOWER NETWORK
PROVISIONAL MEMBERSHIP AGREEMENT

THIS WILDFLOWER NETWORK PROVISIONAL MEMBERSHIP AGREEMENT (this "**Agreement**") is effective as of January 13, 2025 (the "**Effective Date**") by and between The Wildflower Foundation ("**TWF**"), a Minnesota nonprofit corporation, and Upstate New York Wildflower Public Charter School, a New York nonprofit corporation ("**Charter Organization**").

RECITALS

A. The Wildflower Network of Wildflower member schools and charter organizations, TWF, foundation partners, and community stakeholders (the "**Wildflower Network**") works toward the liberation of every human being, every community, and the human spirit, so that we may all live in harmony with our individual purpose and the world around us, free from oppression and able to follow life's unfolding journey (the "**Wildflower Purpose**").

B. TWF exists to support the entire Wildflower Network and acts on behalf of the Network in areas where the members of the Network have shared interests, including administering the process by which charter schools and charter organizations join the Network, remain in the Network, and separate from the Network.

C. Charter Organization is a newly established organization and is in the process of obtaining all necessary state authorizations to operate one or more school sites (the "**Authorization Process**").

D. Charter Organization desires to access certain of the benefits of the Wildflower Network during the Authorization Process but is not yet eligible for full membership in the Network.

E. TWF is willing to grant Charter Organization provisional membership in the Wildflower Network during the Authorization Process on the terms and conditions described in this Agreement.

In consideration of the promises and commitments set forth in this Agreement, TWF and Charter Organization agree as follows:

AGREEMENT

1. Grant of Provisional Membership. TWF hereby grants Charter Organization provisional membership in the Wildflower Network subject to the terms and conditions of this Agreement ("**Provisional Membership**"). The benefits of Provisional Membership are subject to change at any time with notice to Charter Organization and may be suspended or revoked in accordance with this Agreement and the Wildflower Network Policies. The current list of benefits of Provisional Membership are set forth in Exhibit A. Provisional Membership applies solely to Charter Organization and not to any school sites that may be established by Charter Organization.

2. Eligibility Requirements of Provisional Membership. To be eligible for and maintain status as a Provisional Member, Charter Organization must meet the requirements set forth below. By signing this Agreement, Charter Organization's authorized representative represents and warrants that Charter Organization meets all such eligibility requirements as of the Effective Date.

2.1 Charter Organization must be a nonprofit corporation duly organized and in good standing under the laws of its state of incorporation.

2.2 Charter Organization's incorporation document must state that: (a) the Charter Organization is organized and operated exclusively for exempt purposes set forth in Section 501(c)(3) of the Internal Revenue Code; and (b) upon dissolution, its remaining assets will be distributed to another 501(c)(3) organization or to the state.

2.3 Charter Organization must be operated under the oversight and direction of a governing board, the membership of which meets all applicable state law requirements and Wildflower Network Policies.

2.4 Charter Organization must have begun the Charter Application Process and must be making satisfactory progress toward satisfying applicable state law requirements to operate a charter school.

2.5 Charter Organization must have a good-faith intent to join the Wildflower Network as a full member upon completion of the Authorization Process.

3. Expectations of Charter Organization. As a Provisional Member of the Wildflower Network, Charter Organization shall:

3.1 use its best efforts to express the Wildflower Purpose and Principles in the design and operation of its program;

3.2 adopt and comply with the Network Policies as they may be updated from time to time;

3.3 adopt and comply with governance policies consistent with nonprofit best practices, as outlined in the Network Policies;

3.4 conduct itself in a manner that benefits the good reputation of the other schools in the Wildflower Network and TWF and that does not disparage or degrade goodwill in the local community or nationally;

3.5 remain in good standing as a nonprofit corporation under the laws of the state of its incorporation;

3.6 operate at all times in a manner consistent with the requirements of an organization described in Section 501(c)(3) of the Internal Revenue Code;

3.7 provide to TWF a sustainable budget for the Charter Organization that has been through the Advice Process as described in the Network Policies;

3.8 transparently share with TWF the Charter Organization's financial, operating, and governance information upon request by TWF and cooperate with TWF in meeting TWF's IRS reporting obligations as the central organization maintaining the group exemption for members of the Wildflower Network;

3.9 partner with peers and stakeholders in self-reflection for shared accountability of the Wildflower Purpose and Principles, including shared accountability to schools within a local community of member schools;

4. No Access to Wildflower Branding. Charter Organization understands and agrees that Provisional Membership does not include any license to use the Wildflower logos, trademarks, word marks, or any other brand identifiers without express written permission from TWF, which permission may be withheld at TWF's sole discretion.

5. Term. This Agreement shall be effective on the Effective Date and shall continue for a term of one (1) year unless earlier terminated as provided herein; thereafter, this Agreement may be renewed for successive one (1) year renewal terms by mutual agreement of the parties.

6. Termination. This Agreement may be terminated at any time during its initial term or any renewal term as follows:

6.1 by Charter Organization, for any reason or no reason, upon written notice to TWF;

6.2 by TWF, for Charter Organization's failure, as determined in TWF's sole discretion, to meet any eligibility requirement set forth in Section 2 or any of the expectations set forth in Section 3, upon written notice to Charter Organization specifying the nature of the failure and giving Charter Organization the opportunity to cure such failure within thirty (30) days; if, after 30 days the failure remains uncured, this Agreement shall terminate without the need for further action by TWF;

6.3 automatically, upon dissolution of Charter Organization;

6.4 automatically, upon completion of the Authorization Process and execution of a Wildflower Network Membership Agreement between Charter Organization and TWF.

7. Effect of Termination. Upon termination of this Agreement pursuant to Section 6.1, 6.2, or 6.3, all benefits of Provisional Membership shall cease and TWF will drop Charter Organization from the list of organizations participating in TWF's group exemption.

8. Incorporation of Other Terms. The indemnification obligations and general provisions applicable to TWF and Member Charter Organizations, as set forth in Sections 8 and 9 of the Wildflower Network Membership Agreement, as the same may be amended from time to time with notice to Charter Organization, are hereby incorporated into this Agreement and shall apply to TWF and Charter Organization, respectively, as if fully set forth herein.

9. Acknowledgments. By signing this Agreement, Charter Organization's authorized representative acknowledges receipt and understanding of the Wildflower Purpose, Wildflower Principles, Wildflower Network Policies, and Wildflower Network Membership Agreement.

[Signature page follows]

IN WITNESS WHEREOF, the parties hereto have executed this Agreement to be effective as of the Effective Date.

TWF:

THE WILDFLOWER FOUNDATION

[redacted]

Name: Erin Quigley
Role: Director of Charter Design and Replication

Charter Organization:

Upstate New York Wildflower Public Charter School,

[redacted]

Name: Courtney Soucy
Role: Director

Exhibit A

Provisional Membership Benefits

1. **Being Part of a Community:** Provisional Members will have opportunities to access the wisdom and support of other Members of the Wildflower Network and contribute their own wisdom and support for the benefit of other Members. TWF facilitates these available benefits through work such as pod and hub meetings, affinity spaces, ongoing virtual and in-person learning opportunities, and networking opportunities.

2. **Tools and Resources**: Provisional Members will have access to the tools and resources that have been created to help schools and sites express the Wildflower Purpose and Principles and open and operate a thriving Wildflower community at every step of the journey. Tools and resources include, but are not limited to, iterative self-reflection tools and practices; website design; finance, operations, and governance tools; operations advice; marketing resources; and the Wildflower group exemption for tax-exempt status.

3. **Funding Opportunities**: Provisional Members may apply for, from time to time, funding opportunities identified by TWF and partners for startup and operating activities.

R-14ad - Governance

a. Board Members

Trustee Name	Position on the Board	Committee Affiliations	Expertise/Role	Voting	Ex-Officio ?
Julia Franklin	President	Executive	Charter Management/ Charter Operations	Yes	No
Leah Ferrone	Vice President	Executive	Teaching/ Nonprofit leadership	Yes	No
Jessica Connor	Secretary	Academic Excellence (Education Committee)	Special Education Administration/ Teaching	Yes	No
Ruhi White	Treasurer	Finance	Financial Management/ strategic planning	Yes	No
Stacey Hengsterman	General	Community Engagement	Nonprofit leadership/ Community building	Yes	No
Johanna Eldridge	General	Community Engagement	Prospective parent in the district	Yes	No
Danisha Feliz	General	Academic Excellence	Nonprofit management/ teaching	Yes	No
Asma Yasin	General	Academic Excellence	Special Education/ENL teaching	Yes	No
Courtney Murphy	*General*	*All*	*Executive Director for Wildflower Upstate NY*	*No*	*Yes*

Board Member Recruitment and Selection Process

WUNYCS implemented a structured and intentional process to recruit and select highly qualified board members who bring diverse expertise and represent the interests of the students and families the school will serve.

To attract potential board members, the team publicly posted a LinkedIn job listing as well as social media posts stating we were seeking board members. The LinkedIn posting (shared below) included a detailed job description outlining governance responsibilities, desired skill sets, and the school's mission. Interested individuals were invited to apply by submitting a cover letter and resume, allowing the selection team to assess their experience, alignment with the school's vision, and potential contributions to board governance.

Following the submission process, lead applicant Courtney Murphy personally followed up with applicants via phone calls to discuss their interest, background, and expertise in relation to the board's needs. Courtney also shared her vision for the school, the application process with SUNY, and the timeline by which this would happen (ensuring Board members realized we were in the application phase for a potential school opening date of Fall 2026). The selection process prioritized candidates with specific skill sets that would enhance effective governance, such as:

- Charter school management/operations
- Special education law/charter school compliance related to IEPs
- Financial oversight
- Nonprofit governance
- Teaching and/or administrative experience in pre-k-12 schools, specifically charter schools
- A parent representative from the proposed school district
- Inclusivity mindset- knowledge/awareness of or direct lived experience with people with disabilities

Board roles were offered to individuals who demonstrated a strong alignment with the school's mission and possessed expertise that would contribute to the successful launch and oversight of the charter school. Looking ahead, WUNYCS remains committed to broadening its board recruitment efforts to ensure that board members reflect the community the school will serve. Additional recruitment efforts will focus on engaging local community leaders, educators, and parents through targeted outreach, networking, and community events. This ongoing process will ensure that the board remains inclusive, representative, and well-equipped to provide strategic oversight for the school's long-term success.

Board Members responded to the following posted Job description on linkedin, followed by a phone interview with lead applicant, Courtney Murphy.

Wildflower Montessori Upstate NY Description:

Our mission at "Ballston Spa Montessori"* is to create an inclusive and empowering learning environment rooted in Montessori philosophy, where every child has access to the tools, resources, and support they need to thrive. We are committed to ensuring that every student and their families feel a sense of belonging within our school. Through a child-centered curriculum that honors the Montessori principles of hands-on learning, self-direction, and collaborative exploration, we hope to inspire a true love for learning in our students.

Our vision at “Ballston Spa Montessori”* is to model and emphasize equity in all aspects of our school community. Through this, we empower students to embrace their unique identities and contribute meaningfully to the world around them, fostering a sense of responsibility and compassion toward creating a more accepting and inclusive society, where everyone feels a sense of belonging.

*Name subject to change: we seek open ended feedback from families in the community about your goals/vision for education for your children. Our hope is to merge your vision with ours to co-create our classroom together. Our name will reflect that as well!

Role Description

We are hiring for several volunteer board member positions for a public charter Montessori micro-school, slated to open in Fall of 2026 in Ballston Spa, New York. Board Members are responsible for providing oversight, guidance, and strategic direction for the school, collaborating with other board members (participation via zoom acceptable, some in person meetings required), attending meetings, and participating in decision-making processes.

Qualifications

We seek various board positions. Descriptions are below: Board Member (General) Skillset: Leadership, Communication, Strategic Planning, Diverse Expertise Attends all board meetings; participates in at least one committee; contributes to decision-making and strategic planning; supports the school's mission and goals; engages in community outreach. Board Chair/Board President Skillset: Leadership, Governance, Strategic Planning, Meeting Facilitation. Leads the board; sets meeting agendas; facilitates meetings; coordinates with the school leader; ensures board responsibilities are met; oversees annual board assessments and planning. The following qualifications are beneficial for our Board, to ensure we set a strong foundation for the families and children we will be serving:

- Experience in nonprofit governance, decision-making, and strategic planning
- Financial management and budgeting skills
- Strong communication and interpersonal skills
- Experience in education, non-profit, or leadership roles
- Understanding of education policy and community engagement
- Commitment to diversity, equity, and inclusion
- Ability to work collaboratively with a diverse group of stakeholders
- Advanced degree or relevant experience in education, business, or related field

At WUNYCS, we’re committed to fostering a diverse and inclusive work environment where everyone can thrive. We encourage women and individuals from underrepresented groups to apply, even if they don’t meet every qualification. Many of our strongest team members didn’t meet every requirement listed in this description, but brought unique skills and perspectives that were a great fit for our mission/vision. If you’re passionate about this opportunity, eager to learn, and ready to contribute, we want to hear from you!

We value diversity, growth, and the fresh ideas that make our team stronger. Apply today! Please email [redacted] with your resume and cover letter describing which role you're interested in. We look forward to hearing from you!

We are committed to continuing the same strategic approach we have taken to recruit board members who reflect the interests and diversity of the students and families we aim to serve. Our process has involved targeted outreach, community engagement, and intentional selection of individuals with expertise in areas such as charter management, special education law, and local family representation. Moving forward, we will maintain this

intentional recruitment strategy, ensuring that our board remains representative, mission-aligned, and equipped to support the success of our school community.

Once applicants submitted their resume and cover letter, Courtney engaged prospective board members in phone conversations to determine alignment with the schools mission and vision and any skill sets that were pertinent to various board governance roles/responsibilities. Once both people agreed to moving forward in the application process, proposed positions were determined and later offered and confirmed via email.

b. Education Corporation Board Roles and Responsibilities

Roles and Responsibilities of the Board of Trustees

The Board of Trustees serves as the governing body of the school and holds ultimate responsibility for ensuring its academic, financial, and operational success while upholding the school's mission and values.

- The Board operates in accordance with its bylaws, ensuring that the school functions in alignment with TWF's norms and working approaches. It exercises oversight first in an advisory role, while also establishing processes to determine whether to invoke the Wildflower Conflict Resolution Process when necessary.
- The Board is responsible for the selection of Teacher Leaders, reviewing and approving recommendations made by TWF and the leadership committee of teacher-leaders. Other staff members are selected by the Teacher Leaders or their designated representatives.
- The Board monitors the performance of Teacher Leaders, ensuring they align with the school's mission and goals. A formal evaluation of Teacher Leaders is conducted annually.
- In its initial operations, the Board will contract with TWF for services such as professional development opportunities, financial oversight, and other partnerships to be determined by the board, Teacher Leaderships, and TWF.
- The Board will regularly evaluate TWF's performance in relation to the school's mission and partnership agreement, conducting a formal review at least once per year.
- If TWF is not meeting expectations or is no longer effectively supporting the school's mission, the Board will modify or terminate the management agreement in accordance with WUNYCS's bylaws and in communication with SUNY CSI over any concerns.
- The Board is responsible for ongoing oversight of the school's academic performance, operational efficiency, and financial stability. It will take appropriate actions to gather information, assess challenges, and implement solutions to ensure the school remains aligned with its mission.

By maintaining strong oversight and accountability, the Board of Trustees ensures that WUNYCS operates effectively and continues to provide high-quality Montessori education to its students.

Monitoring School Performance, Including Fiscal Oversight

The Board of Trustees of WUNYCS is responsible for ongoing oversight of the school's academic performance, fiscal health, and operational effectiveness to ensure the school is meeting its mission, accountability standards, and governance obligations.

Academic Performance Monitoring

The Board will evaluate the school's academic success by reviewing key performance indicators, including:

- Student achievement data from standardized assessments, Montessori progress tracking, and internal benchmarks.
- Student growth measures to assess individual learning progress over time.
- Special education and English Language Learner (ELL) support compliance to ensure that all students receive legally required services.
- IEP goal tracking for students with disabilities/progress towards those goals
- Attendance and retention rates to assess student engagement and school culture.
- Teacher effectiveness reviews, which include self-evaluations, peer reviews, and formal performance assessments aligned with Montessori best practices.

The Board will use reports from the teacher leaders, state-mandated assessments, classroom observations, and parent/student feedback surveys to ensure academic goals are being met.

Fiscal Oversight & Financial Performance Monitoring

To ensure financial sustainability, the Board will review:

- Quarterly financial reports including income statements, balance sheets, and cash flow projections.
- Annual independent audits to confirm compliance with state and federal financial regulations.
- Budget-to-actual comparisons to ensure expenditures align with approved financial plans.
- Fundraising and grant revenue tracking to monitor external funding sources.
- Enrollment trends and per-pupil funding to ensure financial viability.

The Board's Finance Committee will work closely with the Executive Director and future financial management partners to assess budgetary needs, financial risks, and sustainability strategies.

Operational & Compliance Oversight

To maintain effective operations, the Board will regularly review:

- Staffing levels and retention data to assess workforce stability.
- Facilities and safety reports to ensure compliance with health and safety regulations.
- Special education and student services compliance reports to confirm adherence to IDEA and other legal requirements.
- Stakeholder feedback from parent, student, and staff surveys to evaluate school climate.
- Governance and legal compliance reports, ensuring adherence to state charter requirements and bylaws.

Accountability & Decision-Making Process

The Board will ensure accountability through:

- At minimum once monthly board meetings, where teacher leaders present performance data.
- Annual strategic reviews to evaluate progress toward long-term goals.
- Corrective action plans, if performance metrics indicate areas of concern.
- External reporting to state authorizers, ensuring continued charter compliance.

Through data-driven decision-making, regular evaluations, and transparent financial oversight, the Board of Trustees will ensure that WUNYCS remains mission-aligned, financially sound, and operationally effective.

Evaluating Teacher Leaders (School Leaders)

Since WUNYCS follows a Teacher Leader model, the Board evaluates leadership effectiveness based on how well Teacher Leaders manage both instructional and administrative responsibilities. This evaluation includes:

- Student Achievement Data – Reviewing standardized assessment results, Montessori progress tracking, and student growth data to assess educational effectiveness.
- Classroom Observations & Instructional Quality – Evaluating teaching effectiveness through peer reviews, classroom observations, and parent/student feedback.
- School Culture & Community Engagement – Assessing how well Teacher Leaders foster an inclusive, supportive, and mission-driven learning environment.
- Operational & Financial Management – Ensuring that Teacher Leaders manage staffing, budgeting, and compliance effectively, in alignment with the school's operational goals.
- Annual Self-Evaluation & Board Review – Teacher Leaders complete a self-assessment, which is reviewed by the Board's Governance Committee. The Board also collects input from teachers, families, and school stakeholders to ensure a 360-degree review.
- Ongoing Professional Development – Identifying areas for growth and ensuring that Teacher Leaders receive support and professional development opportunities to strengthen their leadership.

If performance concerns arise, the Board works with Teacher Leaders to implement plans for improvement or, if necessary, make leadership changes to uphold the school's mission.

Evaluating TWF as a Partner

Since WUNYCS contracts with Wildflower Schools Foundation (TWF), the Board conducts an annual performance review of TWF to determine if it is effectively supporting the school.

- Contract Compliance – Ensuring TWF fulfills its services agreement.
- Training & Support for Teacher Leaders – Evaluating how well TWF equips school leaders with the resources, professional development, and operational guidance needed for success.
- Financial Oversight & Resource Management – Reviewing whether TWF provides fiscal management support and strategic planning assistance as outlined in its agreement.
- Stakeholder Satisfaction – Gathering feedback from Teacher Leaders, staff, and Board members on TWF's impact and responsiveness.
- Annual Performance Evaluation – The Board formally reviews TWF's effectiveness and, if concerns arise,

considers modifying or terminating the management agreement in accordance with the school's bylaws and in communication with SUNY CSI.

Accountability Measures

- Monthly board meetings where Teacher Leaders and TWF report progress.
- Annual board review of leadership and management performance based on data-driven metrics.
- Clear benchmarks and accountability goals to assess alignment with the school's mission.
- Corrective action plans if leadership or management partners are not meeting expectations.

Evaluation of the Executive Director

The Board of Trustees of WUNYCS is responsible for evaluating the Executive Director (ED) to ensure they are effectively supporting the school/teacher leaders in alignment with its mission, academic goals, financial health, and operational expectations. This evaluation process is structured, data-driven, and conducted annually, with ongoing performance monitoring throughout the year.

Key Areas of Evaluation

1. Academic Leadership & Student Outcomes

- Student Achievement Data – The Board reviews standardized test scores, Montessori progress tracking, and student growth data to assess whether the school is meeting academic goals.
- Curriculum Implementation & Instructional Leadership – The ED is evaluated on how effectively they ensure that Montessori principles and academic standards are upheld. Though they are not responsible for coaching or instructional leadership as it relates to the teacher leaders, they are responsible for ensuring we are in compliance with any students IEP goal tracking, ELL supports, oversight in data collection and analyzing said data, and as such will be evaluated in line with teacher leaders in regards to instructional leadership.
- Teacher Support & Professional Development – The Board assesses the ED's ability to recruit, develop, and retain high-quality Teacher Leaders and staff.

2. Operational & Financial Management

- Budget Oversight & Financial Sustainability – The ED is responsible for managing the budget, securing funding, and ensuring financial stability. The Board reviews financial statements, budget-to-actual reports, and fundraising efforts.
- Regulatory Compliance & Charter Renewal – Ensuring that the ED maintains compliance with state and federal education laws, including special education, safety, and reporting requirements.
- Enrollment & Family Engagement – The ED is evaluated on their role in student recruitment, retention, and community engagement.

3. Strategic Vision & Mission Alignment

- Long-Term Planning & School Growth – The Board assesses how well the ED implements strategic initiatives and adapts to the evolving needs of the school.
- Stakeholder Engagement – The ED must demonstrate strong communication and collaboration with staff, families, the community, and the Board.
- Commitment to Diversity, Equity, and Inclusion – The ED is evaluated on their ability to create an inclusive school culture that reflects the mission of WUNYCS.

4. Leadership & Organizational Culture

- Staff Satisfaction & Retention – The Board collects feedback from staff to gauge the ED's leadership effectiveness.
- Conflict Resolution & Decision-Making – The ED is evaluated on their ability to address challenges, resolve conflicts, and foster a collaborative work environment.

Evaluation Process

1. Annual Self-Evaluation – The ED submits a self-assessment reflecting on achievements, challenges, and areas for growth.

2. Board Review & Feedback – The Board conducts formal performance evaluations, incorporating:

    - Financial reports
    - Academic performance data
    - Stakeholder feedback from teachers, families, and staff

3. Mid-Year Check-Ins – In addition to the formal review, the Board schedules mid-year progress meetings with the ED.

4. Action Plan & Goal Setting – Following the evaluation, the Board collaborates with the ED to set measurable goals for the upcoming year.

If the ED is not meeting expectations, the Board may implement plans for improvement, outlining specific areas for development and a timeline for progress. In cases of persistent underperformance, the Board may consider leadership changes in alignment with the school's bylaws. By maintaining consistent and data-driven evaluations, the Board ensures that the Executive Director remains accountable, mission-aligned, and an effective leader for WUNYCS. Additionally, by ensuring rigorous oversight of Teacher Leaders and TWF, the Board of Trustees maintains high standards of leadership, accountability, and mission alignment, ensuring the school's long-term success.

c. Education Corporation Board Design

Board Design and Governance Structure

As outlined in the Board's bylaws, the governance structure of WUNYCS incorporates the following key elements to ensure effective oversight, accountability, and alignment with the school's mission:

- The Board will consist of between 5 and 11 trustees, maintaining compliance with Section 226 of the New York Education Law. Five trustees represent the minimum required for effective governance, while 11 is considered the recommended workable number through SUNY to ensure efficient decision-making. The Board will have the discretion to set the exact number as needed. As of the time of this application, the board recruited thus far totals 8 women.

- The Board's officers will include a Chair, Vice Chair, Secretary, and Treasurer, as these are considered core leadership roles necessary for managing Board operations.

    - The Chair will oversee the Board's activities and carry out delegated functions.
    - The Vice will provide support to the Chair and may step in as needed in absence of the Chair.
    - The Treasurer will be responsible for financial oversight, including budget management and fiscal reporting.

    - The Secretary will be responsible for maintaining Board records, meeting minutes, and governance documentation.

- The Board has the authority to delegate the role of presiding over meetings to a Teacher Leader, reinforcing Wildflower's decentralized leadership model.
- There will be no ex-officio members on the Board, ensuring that all members serve with full authority and responsibility.
- The Board will establish the following standing committees to support its governance functions:

    - Executive Committee – Chaired by the Board Chair, this committee will facilitate efficient decision-making and governance compliance, as required under New York Education Law Section 226.
    - Finance Committee – Chaired by the Treasurer, this committee will oversee budgetary matters, financial reports, and fiscal decision-making to ensure responsible financial stewardship.
    - Academic Excellence (Education Committee) – Responsible for monitoring student achievement, ensuring academic accountability, and supporting Teacher Leaders in upholding and improving educational standards set forth in the school's charter. This board will specifically play a key role in ensuring our inclusive model is true in not just our words but our actions, ensuring a portion of the education committee's focus is always inclusive of Special Education data and progress.

- The Board may delegate authority to committees, officers, employees, or contractors as necessary to support school operations and governance responsibilities.
- To ensure transparency and accountability, the Board will receive regular reports from Teacher Leaders on

academic, financial, and operational performance metrics, which will be reviewed during monthly board meetings.

- During regular Board meetings, trustees will solicit input from Teacher Leaders and may also gather additional insights from staff, contractors, or external advisors as needed.
- The Board will meet monthly at the school, in addition to providing a Zoom or Google meet option for any physically absent member as well as the public to join remotely. They will also support as needed with committee meetings held as necessary to fulfill their responsibilities effectively.
- In compliance with the New York Open Meetings Law, the Board will publicly announce its meetings in advance, as well as provide a Zoom/Google meet option for remote joining.

    - If scheduled at least one week in advance, the time and location will be provided to the news media and posted publicly at least 72 hours before the meeting.
    - If scheduled less than a week in advance, notification will be given as soon as practicable and posted publicly in a timely manner.

- Trustee Recruitment & Onboarding: The Board will actively recruit new trustees and, when vacancies arise, will form an ad hoc Nominating Committee to identify, vet, and present candidates for Board review and approval.
- New trustees will receive Board policies, governance materials, and an orientation program to familiarize them with their roles, responsibilities, and the school's mission.
- The Board will engage in ongoing governance training, facilitated by external experts, to strengthen its effectiveness in overseeing a small autonomous organization, ensuring appropriate delegation of decision-making authority to Teacher Leaders, and supporting autonomous school leadership.

Through this structured governance model, WUNYCS ensures effective oversight, transparency, and alignment with its mission while empowering Teacher Leaders to operate with autonomy within a supportive governance framework.

d. Stakeholder Participation

The Board of Trustees at WUNYCS is committed to fostering a collaborative and inclusive governance model where students feel seen, safe, and heard, and families experience a true sense of belonging. To achieve this, the Board will maintain transparent communication, actively engage parents and the community, and ensure school staff play a key role in decision-making. At the start, our Board will support (and has supported) community efforts for outreach. They will participate and be seen at community events and fundraising efforts. They will know and support our families and students. Regular open board meetings, parent forums, and advisory committees will provide opportunities for families to contribute their voices, while annual surveys and feedback sessions will guide improvements in school culture and operations. In our application phase and during initial Board conversations- it was decided that we should have a local district parent on our Board, which is currently held by Johanna Eldridge, a prospective parent to four young daughters in Ballston Spa Central School District. We seek parent input on our board and view the parents role in education as a vital partnership.

Collaboration with the broader community and local organizations will strengthen the school's impact,

ensuring students benefit from enrichment opportunities, mentorship programs, and meaningful community connections. Through partnerships with local institutions, businesses, and cultural organizations, the school will cultivate real-world learning experiences and deepen its engagement with the surrounding community. Some of this work has begun during the application phase, with lead applicant Courtney Murphy actively working to seek partnerships with local community organizations such as the Ballston Area Community Center and Ballston Area Recreation Center. By forging partnerships with these organizations, our teacher leaders, executive director, and the board builds community outside of the classroom. The Board will also work closely with Teacher Leaders, receiving ongoing reports on student well-being, school operations, and academic progress, ensuring alignment between governance decisions and classroom realities.

By centering student voice, family inclusion, and community collaboration, the Board will uphold WUNYCS's mission of creating a nurturing, student-driven learning environment. Through shared leadership and open dialogue, the Board will ensure that every child is met with respect, support, and a sense of belonging, allowing them to thrive in an educational space designed for growth, empowerment, and equity.

e. Bylaws

BYLAWS OF WUNYCS

ARTICLE I
OFFICES

Section 1.01. Registered Office. The registered office of this corporation located in New York shall be that as set forth in the Certificate of Incorporation, or in the most recent amendment of the Certificate of Incorporation, or in the most recent statement filed with the Secretary of State of New York changing the registered office.

Section 1.02. Other Offices. This corporation may have such other offices, within or without the State of New York, as the Board of Trustees may from time to time determine.

ARTICLE II
NO MEMBERS

This corporation shall not have members.

ARTICLE III
Board of Trustees

Section 3.01 General Powers. The property, business, and affairs of this corporation shall be managed by or under the direction of the Board of Trustees.

Section 3.02. Number, Qualifications, Term of Office, and Election. The number of directors shall be determined by affirmative vote of a majority of the total number of directors then in office, provided that the number of directors shall not be less than three (3) or more than fifteen (15), and the Teacher Leaders shall serve as ex-officio voting members of the board. “Teacher Leaders” here refers to the two (2) teachers primarily responsible for running the educational day care program under the supervision of the Board of Trustees. Initial directors are those persons named in the Certificate of Incorporation and shall serve until the first annual meeting of the Board of Trustees. Directors must be natural persons and a majority of the directors must be adults. Except for the ex-officio directors who serve for a term that is concurrent with their position as a Teacher Leader, each director shall hold office for a term of one (1) year and through the adjournment of the meeting at which successor directors are elected, and until a successor is elected and qualified, or until the earlier death, resignation, or removal of the director. At each annual meeting, the Board of Trustees shall elect directors to fill vacancies.

The number of directors may be increased or decreased by amendment of these bylaws or by action of the Board of Trustees, provided that such amendment or action shall require the vote of a majority of the entire Board of Trustees and no decrease shall shorten the term of any incumbent director.

Section 3.03. Resignation. A director may resign at any time by giving notice to this corporation. The resignation of a director is effective without acceptance when the notice is given to this corporation, unless a later effective time is specified in the notice. Written notice or an electronic communication which meets the requirements of Section 3.17 may satisfy the notice requirement. A Teacher Leader may only resign from the Board of Trustees upon concurrent resignation from the role of Teacher Leader.

Section 3.04. Removal of Directors. A director may be removed at any time, with or without cause, by the affirmative vote of a majority of the total number of directors then in office. A Teacher Leader may only be removed from the Board of Trustees upon concurrent removal from the role of Teacher Leader. An individual who ceases to serve as a Teacher Leader shall automatically cease to serve as a director.

Section 3.05. Vacancies. Except for a vacancy created by an individual ceasing to serve as a Teacher Leader which will be filled by the person filling the Teacher Leader vacancy, any vacancy in the Board of Trustees caused by death, resignation, removal, an increase in the number of directors, expiration of term, or any other cause, shall be filled by affirmative vote of a majority of the total number of remaining directors, though less than a quorum, and the term of the director filling the vacancy shall hoold office until the next annual meeting at which directors are to be elected and until a successor is elected and qualified.

Section 3.06. Time, Place and Manner of Meetings. The Board of Trustees may hold its meetings at such time and place, and in such manner as it may from time to time determine. If the Board of Trustees fails to select a place for a meeting or to specify that the meeting will be conducted solely through means of remote communication pursuant to Section 3.07, the meeting shall be held at the registered office.

Section 3.07. Meetings Conducted Solely Through Means of Remote Communication. The Board of Trustees may specify that a meeting will be conducted solely through one or more means of remote communication, provided that notice is given, as specified in Section 3.12, and that the quorum requirements specified in Section 3.13 are met. Remote communication includes any communication that is accomplished by means of by means of a conference telephone or similar communications equipment or by electronic video screen communication as long as all persons participating in the meeting can hear each other at the same time and each director can participate in all matters before the Board of Trustees, including, without limitation, the ability to propose, object to, and vote upon a specific action to be taken by the Board of Trustees. Participation in a meeting through a form of remote communication that is authorized by the Board of Trustees constitutes personal presence at the meeting.

Section 3.08. Attendance and Participation in Meetings by Means of Remote Communication. The Board of Trustees may authorize individual attendance and participation by directors at meetings through one or more means of remote communication as described above in Section 3.07. Participation in a meeting through a form of remote communication authorized by the Board of Trustees constitutes personal presence at the meeting.

Section 3.09. Annual Meeting. The annual meeting of the Board of Trustees shall be held each year at such time and place and in such manner as the Board of Trustees may determine, for the purpose of electing directors and officers and for the transaction of such other business as shall come before the meeting.

Section 3.10. Other Regular Meetings. Regular meetings other than the annual meeting of the Board of Trustees shall be held from time to time, and at least once annually, at such times and places and in such manner as the Board of Trustees may determine.

Section 3.11. Special Meetings. Special meetings of the Board of Trustees shall be held whenever called by the Chair or by any one of the directors, and shall be held at such times and places and in such manner as the Board of Trustees may determine.

Section 3.12. Notice. Regular meetings of the Board of Trustees may be held without notice if the time and place of such meetings are fixed by the Board of Trustees. Special meetings of the board shall be held upon notice to the directors. Notice of a meeting shall be mailed to each director, addressed to the director at his or her address according to the last available records of this corporation at least five (5) days before the day on which the meeting is to be held, or delivered personally or by telephone, facsimile transmission, or electronic communication which meets the requirements of Section 3.17, not later than two (2) days before the day on which the meeting is to be held; provided, however, notice need not be given if the date, time and place of the meeting were announced at a previous Board of Trustees meeting. The notice shall state the time, place and manner of the meeting, but need not state the purposes thereof. Notice will be deemed waived by any director who attends the meeting in person or participates in the meeting via remote communication, unless the director objects at the beginning of the meeting that the meeting is not lawfully called or convened and does not participate in the meeting. Notice also may be deemed waived if the director consents to such waiver of notice in writing or by electronic communication which meets the requirements of Section 3.17, before, after or during the meeting.

Section 3.13. Quorum. Except as otherwise provided by statute or by these Bylaws, a majority of the total number of directors then in office shall be required to constitute a quorum for the transaction of business at any meeting, and the act of a majority of the directors present at any duly-held meeting at which a quorum is present shall be the act of the Board of Trustees. Each director shall be entitled to one (1) vote on all matters requiring director approval. In the absence of a quorum, a majority of the directors present may adjourn a meeting from time to time until a quorum is present. Notice of any adjourned meeting need not be given, other than

by announcement at the meeting at which adjournment is taken. If a quorum is present when a duly called or held meeting is convened, the directors present may continue to transact business until adjournment, even though the withdrawal of directors originally present leaves less than the number otherwise required for a quorum; provided, however, that the affirmative vote of a majority of the required quorum is required to take any action other than adjournment.

Certain directors may be disregarded for purposes of determining quorum requirements as provided in the Conflict of Interests Policy and Whistleblower Policy, each as approved by the Board of Trustees and amended from time to time.

Section 3.14. Proxy Voting. Proxy voting shall not be permitted.

Section 3.15. Action without Meeting. Any action that may be taken at a meeting of the Board of Trustees or a committee may be taken without a meeting if all members of the Board of Trustees or the committee consent to the adoption of a resolution authorizing the action. Such consent may be written or electronic (in accordance with Section 3.17) and must be filed with the minutes of the proceedings of the board or committee.

Section 3.16. Conflicts of Interest; Whistleblower Policy. It shall be the policy of this corporation that all directors, officers, and committee members of this corporation shall scrupulously avoid any conflict between their own respective individual interests and the interests of this corporation in any and all actions taken by them on behalf of this corporation in their representative capacities. Directors, officers, and committee members shall comply with the Conflict of Interest Policy approved by the Board of Trustees, as such policy may be amended from time to time, and shall annually acknowledge receiving the Conflict of Interest Policy.

It shall also be the policy of this corporation to encourage internal reporting of violations or suspected violations of law or of this corporation's policies. As such, directors shall comply with the Whistleblower Policy approved by the Board of Trustees, as such policy may be amended from time to time.

Section 3.17. Electronic Records and Signatures. This corporation recognizes that authenticated electronic communication which meets the requirements of this section may legally satisfy written record and signature requirements necessary for valid records, signatures, and contracts. Authenticated communications are those communications that set forth information from which this corporation can reasonably conclude that the communication was sent by the purported sender and are delivered to the principal place of business of this corporation, or to an officer or agent of this corporation who is authorized by this corporation to receive the communication. Electronic records are records that are created, generated, sent, communicated, received or stored by electrical, digital, magnetic, wireless, optical, electromagnetic or similar technologies. Valid electronic signatures are those that are

expressed through an electronic sound, symbol or process, and that are logically associated with a record and executed or adopted by a person with intent to sign the record.

ARTICLE IV
OFFICERS

Section 4.01. Number and Qualifications. The officers of this corporation shall be a Chair, one or more Vice Chairs if elected by the Board of Trustees, a Secretary, a Treasurer, and such other officers as may be elected by the Board of Trustees. Any number of offices may be held by the same person, except the offices of Chair and Secretary. Officers shall be natural persons.

Section 4.02. Election and Term of Office. Officers shall be elected annually by the Board of Trustees, and, except in the case of officers appointed in accordance with the provisions of Section 4.10, each shall hold office until the next annual election of officers and until a successor is elected and qualified, or until the earlier death, resignation, or removal of the officer.

Section 4.03. Resignations. Except as otherwise provided in an employment contract, if applicable, an officer may resign by giving notice to this corporation. The resignation is effective without acceptance when the notice is given to this corporation, unless a later effective date is named in the notice. Notice provided in writing or by an electronic communication which meets the requirements of Section 3.17 may satisfy the notice requirement.

Section 4.04. Removal. An officer may be removed, with or without cause, by a resolution adopted by the Board of Trustees.

Section 4.05. Vacancies. A vacancy in an office because of death, resignation, removal, or any other cause shall be filled for the unexpired part of the term in the manner prescribed in these Bylaws for election to such office.

Section 4.06. Chair. The Chair shall: (a) have general active management of the business of this corporation; (b) when present, preside at meetings of the Board of Trustees; (c) see that orders and resolutions of the Board of Trustees are carried into effect; (d) sign and deliver in the name of this corporation deeds, mortgages, bonds, contracts, or other instruments pertaining to the business of this corporation, except in cases in which the authority to sign and deliver is required by law to be exercised by another person or is expressly delegated by the Certificate of Incorporation or Bylaws or by the Board of Trustees to another officer or agent of this corporation; and (e) perform such other duties as may from time to time be prescribed by the Board of Trustees or required by the New York Not-for-Profit Corporation Law to be performed by a person exercising the functions of “president.” No employee of the corporation shall serve as Chair or hold any other title with similar responsibilities, unless the Board of Director approves such employee serving as chair of the board by a two-thirds vote of

the entire board and contemporaneous documents in writing the basis for the board approval; provided, however, that no such employee shall be considered an independent director.

Section 4.07. Vice Chair. In the absence of the Chair, or in the event of his/her inability or refusal to act, the Vice Chair (or in the event there be more than one Vice Chair, the Vice Chairs in the order of their election) shall perform the duties of the Chair, and when so acting, shall have all the powers of and be subject to all of the restrictions upon the President. Any Vice Chair shall perform such other duties as shall from time to time be assigned by the Board of Trustees.

Section 4.08. Secretary. The Secretary shall: (a) maintain records of and, when necessary, certify proceedings of the Board of Trustees; (b) when directed to do so, give proper notice of meetings of the Board of Trustees; and (c) perform such other duties as may from time to time be prescribed by the Board of Trustees or by the Chair.

Section 4.09. Treasurer. The Treasurer shall: (a) keep accurate financial records for this corporation; (b) deposit money, drafts, and checks in the name of and to the credit of this corporation in the banks and depositaries designated by the Board of Trustees; (c) endorse for deposit notes, checks, and drafts received by this corporation as ordered by the Board of Trustees, making proper vouchers for the deposit; (d) disburse corporate funds and issue checks and drafts in the name of this corporation, as ordered by the Board of Trustees; (e) upon request, provide the Chair and the Board of Trustees an account of transactions by the Treasurer and of the financial condition of this corporation; and (f) perform such other duties as may from time to time be prescribed by the Board of Trustees or by the Chair.

Section 4.10. Other Officers. This corporation may have such other officers and agents as the Board of Trustees considers necessary for the operation and management of this corporation, each of whom shall have the powers, rights, duties, responsibilities, and terms in office as may be determined by resolution of the Board of Trustees.

Section 4.11. Delegation. Unless prohibited by a resolution adopted by the Board of Trustees, an officer may, without the approval of the Board of Trustees, delegate some or all the duties and powers of an office to other persons.

Section 4.12. Compensation. The fixing of compensation of officers shall require the affirmative vote of a majority of the entire Board of Trustees; provided, however, that a Director who also serves in the role for which compensation is being decided shall not participate in the vote and shall not be counted for purposes of determining a majority.

ARTICLE V
COMMITTEES

Section 5.01. Committees of the Board of Trustees. The Board of Trustees may act by and through such committees as may be specified in resolutions approved by a majority of the total number of directors then in office. Each such committee shall consist of three (3) or more directors appointed by a majority of the total number of directors then in office. No committee shall have authority as to: (a) The filling of vacancies in the Board of Trustees or in any committee; (b) The fixing of compensation of the directors for serving on the Board of Trustees or on any committee; (c) The amendment or repeal of the bylaws or the adoption of new bylaws; (d) The amendment or repeal of any resolution of the Board of Trustees which by its terms shall not be so amendable or repealable; (e) The election or removal of officers and directors; (f) The approval of a merger or plan of dissolution; (g) The adoption of a resolution recommending to the members action on the sale, lease, exchange or other disposition of all or substantially all the assets of a corporation or, if there are no members entitled to vote, the authorization of such transaction; or (h) The approval of amendments to the Certificate of Incorporation.

Section 5.02. Other Committees. The Board of Trustees may also create committees other than committees of the Board of Trustees, which committees may consist of members who are not directors. No such committee shall have the authority to bind the Board of Trustees, but rather may make recommendations to the Board of Trustees.

Section 5.03. Procedures. The general procedures specified within Article III apply to committees and members of committees to the same extent as those sections apply to the Board of Trustees and directors. Each committee shall prepare minutes of its meetings and shall furnish such minutes to the Board of Trustees and to members of the committee.

ARTICLE VI
BOOKS AND RECORDS

This corporation shall keep at its registered office correct and complete copies of:

(a) its Certificate of Incorporation and Bylaws;

(b) accounting records; and

(c) minutes of meetings of the Board of Trustees and of committees having any of the authority of the Board of Trustees.

ARTICLE VII
INDEMNIFICATION

This corporation shall indemnify persons to the extent required by the New York Not-for-Profit Corporation Law, and shall have the power otherwise to indemnify persons for such expenses and liabilities, in such manner, under such circumstances, and to such extent as permitted by applicable law.

ARTICLE VIII
AMENDMENTS

Amendments to the Certificate of Incorporation and these Bylaws must be approved by a majority of the total number of directors then in office.

* * * * * * * * * * * * * * * * * * * *

These Bylaws have been approved and adopted by the Board of Trustees of this corporation by written action dated _____.

_____
[Name], Secretary

R-14f - Code of Ethics and Conflict of Interest Policy

f. Code of Ethics and Conflict of Interest Policy

Below is a draft of our schools conflict of interest policy:

WUNYCS
CONFLICT OF INTEREST POLICY

Article I
Purpose

The purpose of this Conflict of Interest Policy is to establish the procedures applicable to the identification and resolution of conflicts of interest in the context of transactions or arrangements entered into by WUNYCS where an Interested Person (defined below) may have a Financial Interest (defined below) in or Fiduciary Responsibility (as defined below) towards an individual or entity with which WUNYCS has or is negotiating a transaction or arrangement. The determination that a conflict of interest exists does not prohibit WUNYCS from entering into a proposed transaction or arrangement provided that the procedures set forth in Article III below are followed. This Conflict of Interest Policy is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to nonprofit and charitable corporations.

Article II
Definitions

1. **Interested Person.**

   Any director, officer, or member of a committee with powers delegated by the Board of Directors (the "Board") who has either (a) a Financial Interest (defined below) in; or (b) a Fiduciary Responsibility (defined below) to another organization is an Interested Person.

2. **Financial Interest.**

   A person has a Financial Interest if the person has, directly or indirectly, through business, investment or family (which are a spouse, parent, child, spouse of a child, brother, sister, or spouse of a brother or sister):

   a. an ownership or investment interest in any entity with which WUNYCS has a transaction or arrangement (including but not limited to grants); or

   b. a compensation arrangement with WUNYCS or with any entity or individual with which WUNYCS has a transaction or arrangement (including but not limited to grants);

   c. a potential ownership or investment interest in, or compensation arrangement with, any

entity or individual with which WUNYCS is negotiating a transaction or arrangement (including but not limited to grants); or

d. other than an arm's-length relationship with prospective or actual grantees relative to the design of specific projects, preparation of specific proposals and review and oversight of funded projects and other WUNYCS -related activities.

Compensation includes direct and indirect remuneration as well as gifts or favors that are substantial in nature. Gifts and favors include any gratuitous service, loan, discount, money or article of value, but do not include loans from financial institutions on customary terms, articles of nominal value ordinarily used for sales promotion, ordinary "business lunches" or reasonable entertainment consistent with local social or business customs.

A Financial Interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a Financial Interest may have a conflict of interest only if the Board or appropriate committee decides that a conflict of interest exists.

3. Fiduciary Responsibility.

A person has a Fiduciary Responsibility towards an organization or individual if he or she:

a. occupies a position of special confidence towards such organization or individual;

b. holds in trust property in which another person has the beneficial title of interest, or who receives and controls the income of another; or

c. has a duty of loyalty or duty of care to an organization (by virtue of serving as an officer or director of an organization or other position with similar responsibilities). A duty of loyalty requires the person to refrain from dealing with WUNYCS on behalf of a party having an interest adverse to WUNYCS and to refrain from competing with WUNYCS . A duty of care requires the person to discharge his or her duties in good faith and in a manner he or she reasonably believes to be in the best interests of WUNYCS .

A Fiduciary Responsibility is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a Fiduciary Responsibility may have a conflict of interest only if the Board or appropriate committee decides that a conflict of interest exists.

Article III
Procedures

1. Duty to Disclose.

In connection with any actual or possible conflicts of interest, an Interested Person must disclose the existence and nature of his or her Financial Interest or Fiduciary Responsibility and all material facts related thereto to the Board and any members of relevant committees with Board-delegated powers.

2. Determining Whether a Conflict of Interest Exists.

After disclosure of a Financial Interest or Fiduciary Responsibility and all material facts related thereto, and after any discussion with the Interested Person, such person shall leave the Board or committee meeting while the final determination of whether such Financial Interest or Fiduciary Responsibility creates a conflict of interest is discussed and voted upon. The remaining Board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest.

a. An Interested Person may make a factual presentation at the Board or committee meeting, but after such presentation, he or she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement that may result in a conflict of interest. An Interested Person shall not actively participate in the discussion of, or vote on, the transaction or arrangement that may result in a conflict of interest, either formally at a Board or committee meeting or informally through contact with individual Board or committee members. In addition, the Interested Person should not be counted in determining whether a quorum is present for the Board or committee meeting at which the transaction or arrangement that may result in a conflict of interest is to be voted upon.

b. The Board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the transaction or arrangement that may result in a conflict of interest.

c. After exercising due diligence, the Board or committee shall determine whether WUNYCS can obtain a more advantageous transaction or arrangement with reasonable efforts from a person or entity that would not give rise to a conflict of interest.

d. If a more advantageous transaction or arrangement is not reasonably attainable under circumstances that would not give rise to a conflict of interest, the Board or committee shall determine by a majority vote (or other voting requirement, as provided in the bylaws) of the disinterested directors whether the transaction or arrangement is in WUNYCS ’s best interest and for its own benefit and whether the transaction is fair and reasonable to WUNYCS and shall make its decision as to whether to enter into the

transaction or arrangement in conformity with such determination.

4. Violations of the Conflict of Interest Policy.

a. If the Board or committee has reasonable cause to believe that a director, officer, or member of a committee has failed to disclose an actual or possible conflict of interest, it shall inform such individual of the basis for such belief and afford him or her an opportunity to explain the alleged failure to disclose.

b. If, after hearing the response of the director, officer, or member of a committee and making such further investigation as may be warranted in the circumstances, the Board or committee determines that the individual has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective actions.

Article IV
Records of Proceedings

The minutes of the Board and all committees with Board-delegated powers shall contain:

a. the names of the persons who disclosed or otherwise were found to have a Financial Interest or a Fiduciary Responsibility in connection with an actual or possible conflict of interest, the nature of the Financial Interest or Fiduciary Responsibility, any action taken to determine whether a conflict of interest was present, and the Board's or committee's decision as to whether a conflict of interest in fact existed.

b. the names of the persons who were present for discussions and votes relating to the transaction or arrangement, the names of the persons who recused themselves from such discussion and votes, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection therewith.

Article V
Compensation Committees

If applicable, a voting member of any committee with Board-delegated powers whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from WUNYCS for services is precluded from voting on matters pertaining to that member's compensation.

Article VI
Annual Statements

Prior to the initial election (except with respect to individuals already serving at the time this policy is adopted, in which case promptly after adoption of this policy) of any director, officer, and member of a committee with Board-delegated powers and on an annual basis thereafter, each director, officer, and member of a committee with Board-delegated powers shall sign the

Conflict of Interest Acknowledgement/Disclosure Form attached hereto that:

a. Affirms that such person has received and reviewed a copy of the Conflict of Interest Policy and agrees to comply with its terms;

b. Requires that such person disclose applicable Financial Interests and Fiduciary Responsibilities.

Article VII
Periodic Reviews

To ensure that WUNYCS operates in a manner consistent with its charitable purposes and that it does not engage in activities that could jeopardize its status as an organization exempt from federal income tax, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

a. Whether compensation arrangements and benefits are reasonable and are the result of arm's-length bargaining.

b. Whether any grants are made to disqualified persons, or otherwise result in an excess benefit transaction.

c. Whether arrangements with other organizations conform to WUNYCS s applicable written policies, are properly recorded, reflect reasonable payments for goods and services, if any, further WUNYCS's charitable purposes and do not result in inurement or impermissible private benefit.

Article VIII
Use of Outside Experts

In conducting the periodic reviews provided for in Article VII, [ORGANIZATION] may, but need not, use outside experts. If outside experts are used, their use shall not relieve the Board of its responsibility for ensuring that periodic reviews are conducted.

* * * * * * * * * * * * * * * * * * * *

This Conflict of Interest Policy has been approved and adopted by the Board of WUNYCS on _____.

_____

[INSERT NAME AND APPROPRIATE TITLE: e.g., Secretary or Clerk]

CONFLICT OF INTEREST
ACKNOWLEDGEMENT/DISCLOSURE FORM
FOR WILDFLOWER UPSTATE NEW

1. CONFLICTING ORGANIZATIONS

I am a director, trustee, officer, representative of, or have a Financial Interest in the following organizations that have or may have a conflict with the interests of WUNYCS :
Organization and Title or Interest:

_____

_____

2. CONFLICTING ACTIVITIES/OBLIGATIONS

I am involved in no activity or transaction, nor am I a party to any contract involving interests that are or could be found to be adverse to WUNYCS except for the following:

_____

_____

3. CONFLICTING BUSINESS OPPORTUNITIES/COMMITMENTS

I have not committed to, nor am I pursuing, any business opportunity that does or might adversely affect WUNYCS except for the following:

_____

_____

4. CONFLICTING RELATIONSHIPS

I do not have a Fiduciary Responsibility to any person with whom WUNYCS is pursuing a business opportunity except for the following:

_____

_____

5. OTHER POTENTIAL CONFLICTS

Any other concerns I may have regarding actual or potential conflicts of interest are listed below:

_____

_____

I have received and reviewed WUNYCSs's Conflict of Interest Policy and I agree to comply with it. To the best of my knowledge, I have accurately answered the above questions.

Dated: _____

By:

Signature: _____

Name: _____

Title: _____

R-14g - Complaint Policy

g. Complaint Policy

WUNYCS is committed to fostering a transparent, collaborative, and inclusive learning environment where students, families, staff, and community members feel seen, safe, and heard. In alignment with New York State Education Law § 2855(4) and the New York Charter Schools Act of 1998, this Complaint Policy establishes clear procedures for addressing concerns, including both formal and informal complaints from parents, staff, employees, contractors, and other stakeholders.

I. Informal Complaints

Many concerns can be resolved informally through open dialogue between stakeholders and school personnel. Our school encourages individuals to raise concerns directly with the appropriate school staff member in an effort to resolve issues at the lowest level possible. Informal complaints do not require a written submission and may be resolved through discussions, meetings, or mediation.

Process for Informal Complaints:

1. Step 1: The complainant should first address the concern with the relevant teacher leader or staff member involved.
2. Step 2: If unresolved, the concern may be escalated to the Lead Teacher Leader or Executive Director for further discussion. If the complaint involves the Executive Director, the complaint can be discussed with the Board of Trustees.
3. Step 3: If necessary, the issue may be discussed with the school's Executive Committee of the Board of Trustees.
4. Documentation: While informal complaints do not require written submission, staff will document concerns for reference.
5. Final Decision: If the complainant remains dissatisfied, they may opt to submit a formal complaint as outlined below.

Examples of Informal Complaints:

- Classroom placement concerns
- Student conflicts
- Requests for policy clarification
- Teacher-student interactions

II. Formal Complaints

A formal complaint involves an alleged violation of law, the school's charter, or its policies. Formal complaints must be submitted in writing to ensure accountability and a documented resolution process.

Process for Formal Complaints:

1. Step 1: Submission
    - The complainant must submit a written statement detailing the concern, including:
        - Names of involved individuals
        - Date, time, and location of the incident
        - Description of the violation and any prior attempts to resolve it
        - Requested resolution
        - Contact information (name, address, phone number, email)
    - Complaints should be submitted to the Lead Teacher Leader in person, via email, or mailed to the school office.
2. Step 2: Acknowledgment
    - The Executive Committee of the Board of Trustees will send written acknowledgment within five (5) business days of receipt.
3. Step 3: Investigation
    - The Board's Executive Committee will review, investigate, and address the complaint within forty-five (45) business days.
    - The complainant may be contacted for additional information or clarification.
    - A report will be presented at the next Board meeting or the subsequent meeting thereafter.
4. Step 4: Decision and Notification
    - The Board of Trustees will provide a written determination outlining any necessary remedial action.
    - The complainant will also receive instructions for appealing the decision to SUNY's Charter Schools Institute, if desired.

III. Appeal Process

If a complainant is dissatisfied with the resolution, they may appeal to the following entities in this order:

1. SUNY Charter Schools Institute
    - Appeals regarding violations of law or charter terms must be submitted in writing to the SUNY Trustees via the SUNY Charter Schools Institute.
    - SUNY's Grievance Guidelines are available at: www.newyorkcharters.org/contact
2. New York State Board of Regents
    - If unresolved, the complainant may appeal to the New York State Education Department (NYSED), which will review and investigate as appropriate. The decision of the Board of Regents is final.

IV. Complaint Documentation & Transparency

- All formal complaints and resolutions will be documented and maintained by the school's administrative team.
- The Complaint Policy will be available in the Student & Family Handbook, at the school office, and on the school website.
- Families will be notified of updates to the policy in an annual notice.

V. Summary of Formal vs. Informal Complaints

While informal complaints address day-to-day concerns that do not involve legal or charter violations, formal complaints involve more serious concerns that may require legal or administrative intervention. Informal complaints typically involve minor issues such as classroom conflicts or student placement and are addressed at the staff or leadership level without requiring written documentation. Formal complaints, on the other hand, involve matters such as policy violations, special education concerns, discrimination, or health and safety issues, requiring a written complaint and Board review.

In our inclusive model-special education related concerns are always treated as formal complaints to ensure compliance with applicable laws and appropriate resolution. This policy ensures that special education concerns are always treated as formal complaints, eliminating any ambiguity or risk of disregarding legal obligations.

VI. Conclusion

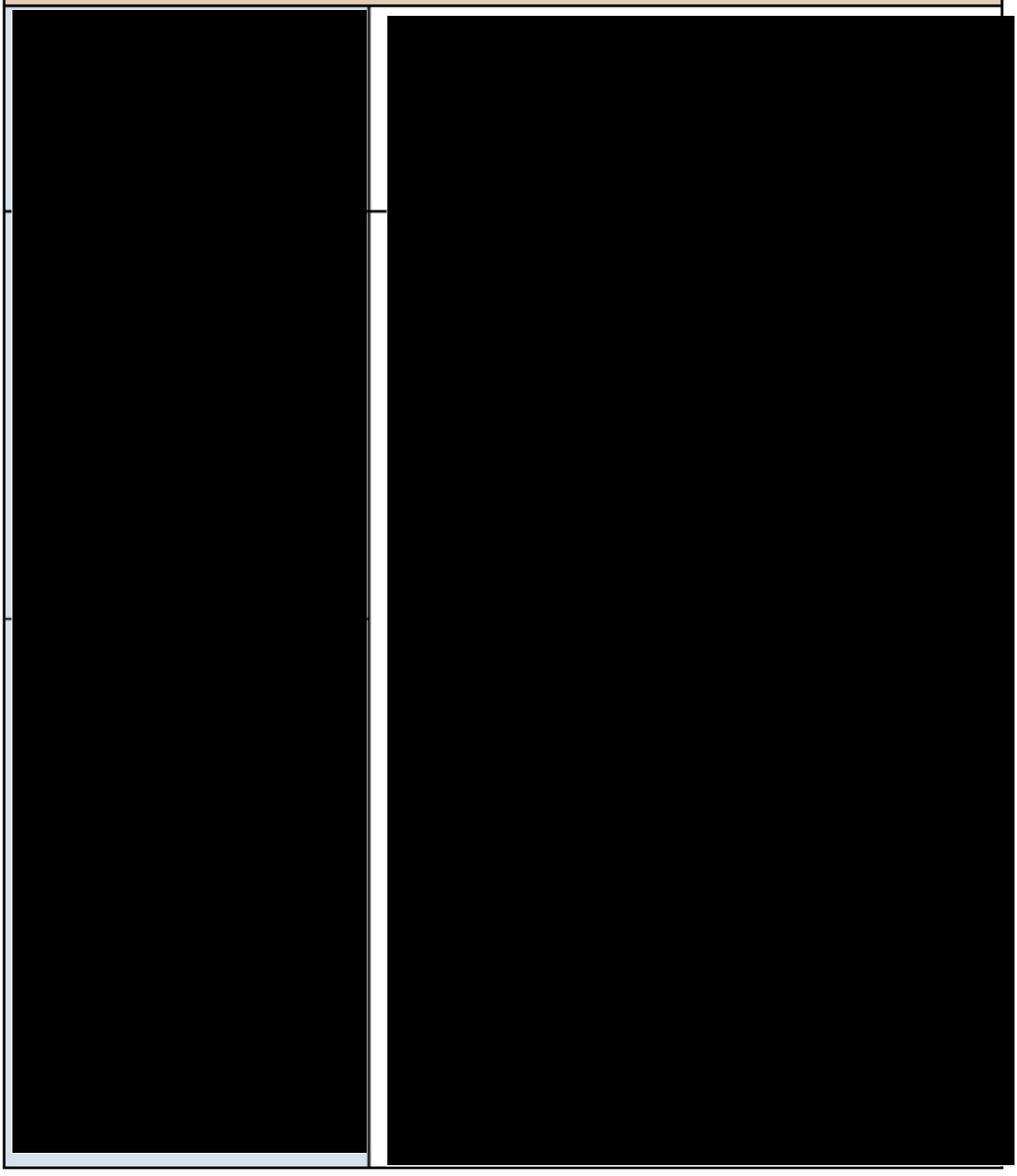
WUNYCS is dedicated to maintaining open lines of communication and fostering a supportive, inclusive school environment where concerns are handled fairly and transparently. By adhering to this Complaint Policy, the school ensures that all voices are heard, valued, and respected while maintaining compliance with state regulations and charter expectations.

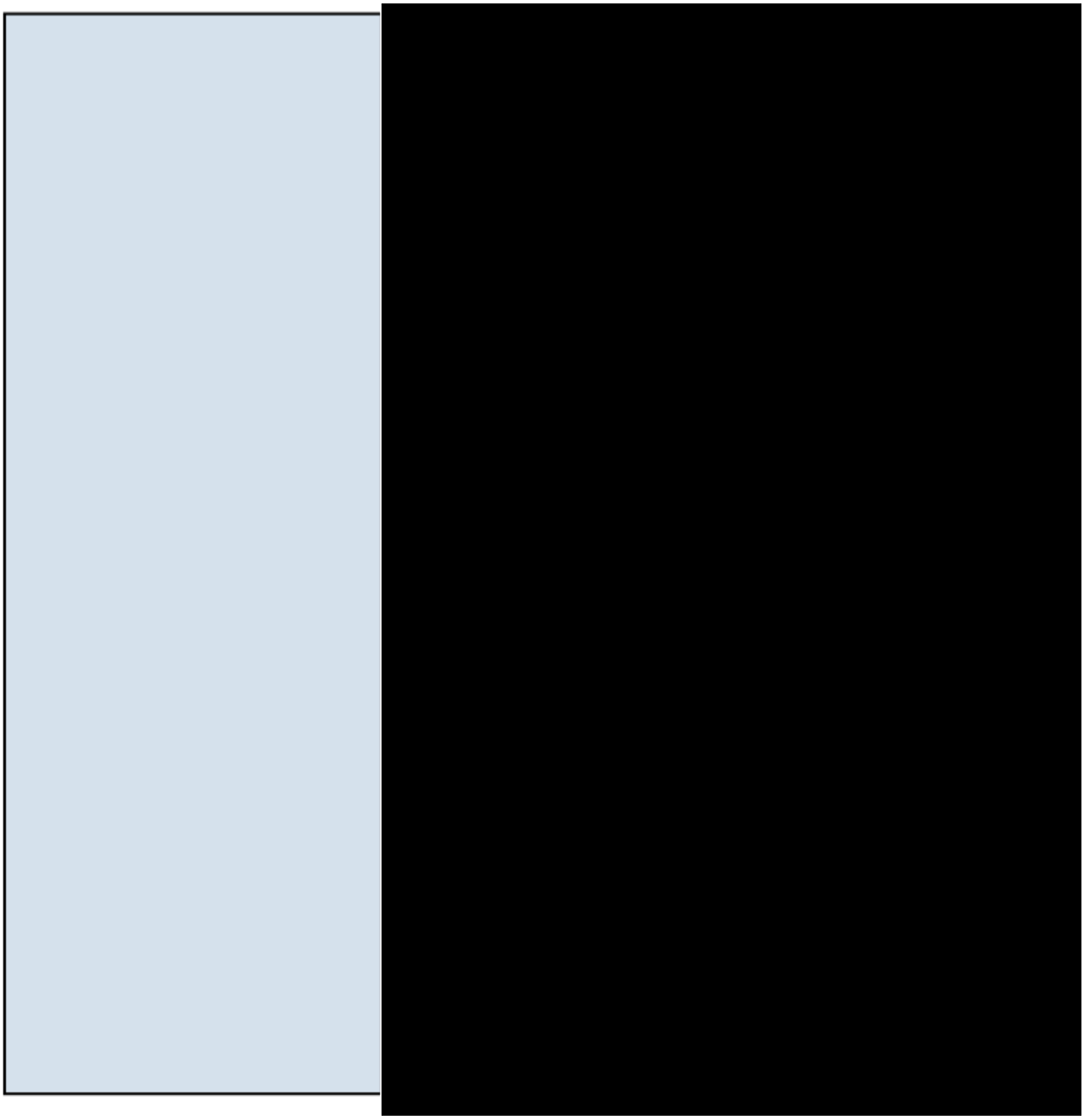
R-14h - Board Member Resumes

The following board member resumes are located on the following page numbers:

Name	**Position on Board**	**Page Number(s)**
Julia Franklin	Board Chair	2-3
Leah Ferrone	Board Vice-Chair	4-5
Ruhi White	Board Treasurer	6-7
Jessica Connor	Board Secretary	8-10
Danisha Feliz	General Board	11-12
Johanna Eldridge	General Board	13-16
Stacey Hengsterman	General Board	17-19
Asma Yasin	General Board	19-21
Courtney Murphy	Non-voting Member Lead applicant/Future Executive Director	22

JULIA MACMILLAN FRANKLIN





LEAH E. FERRONE

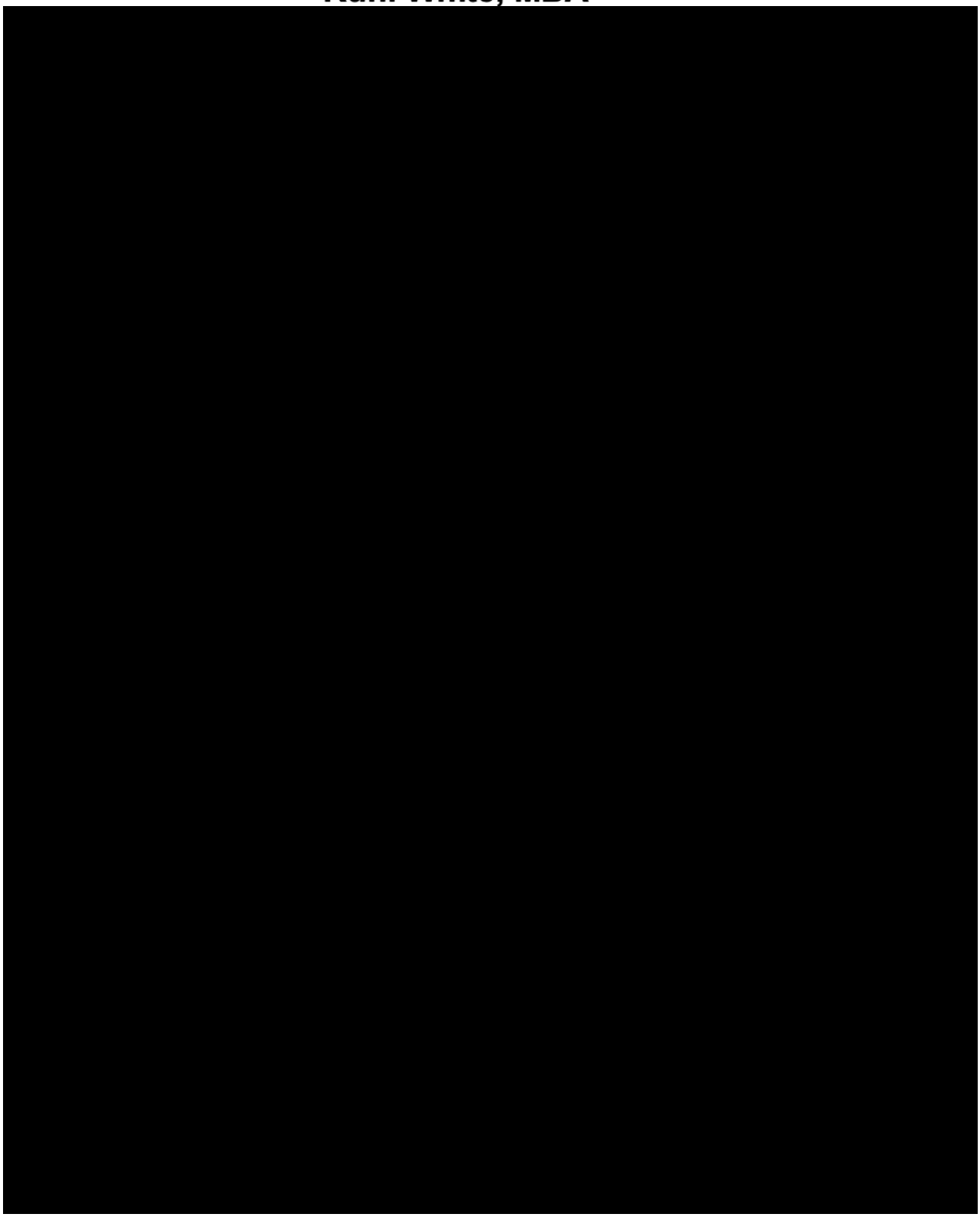
EDUCATION | MINDFUL WELLBEING | CULTURE

[redacted]

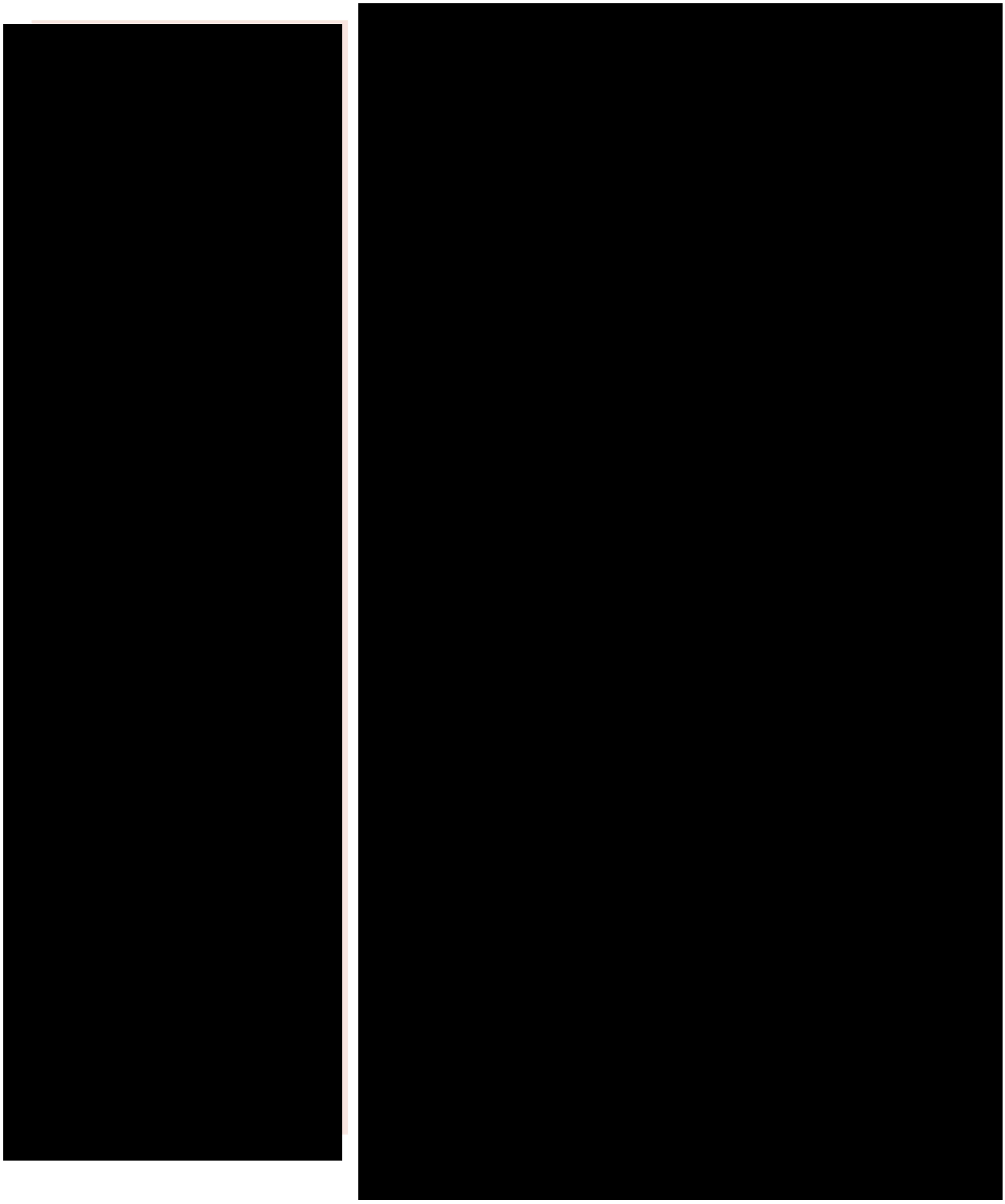
[redacted]

[redacted]

Ruhi White, MBA

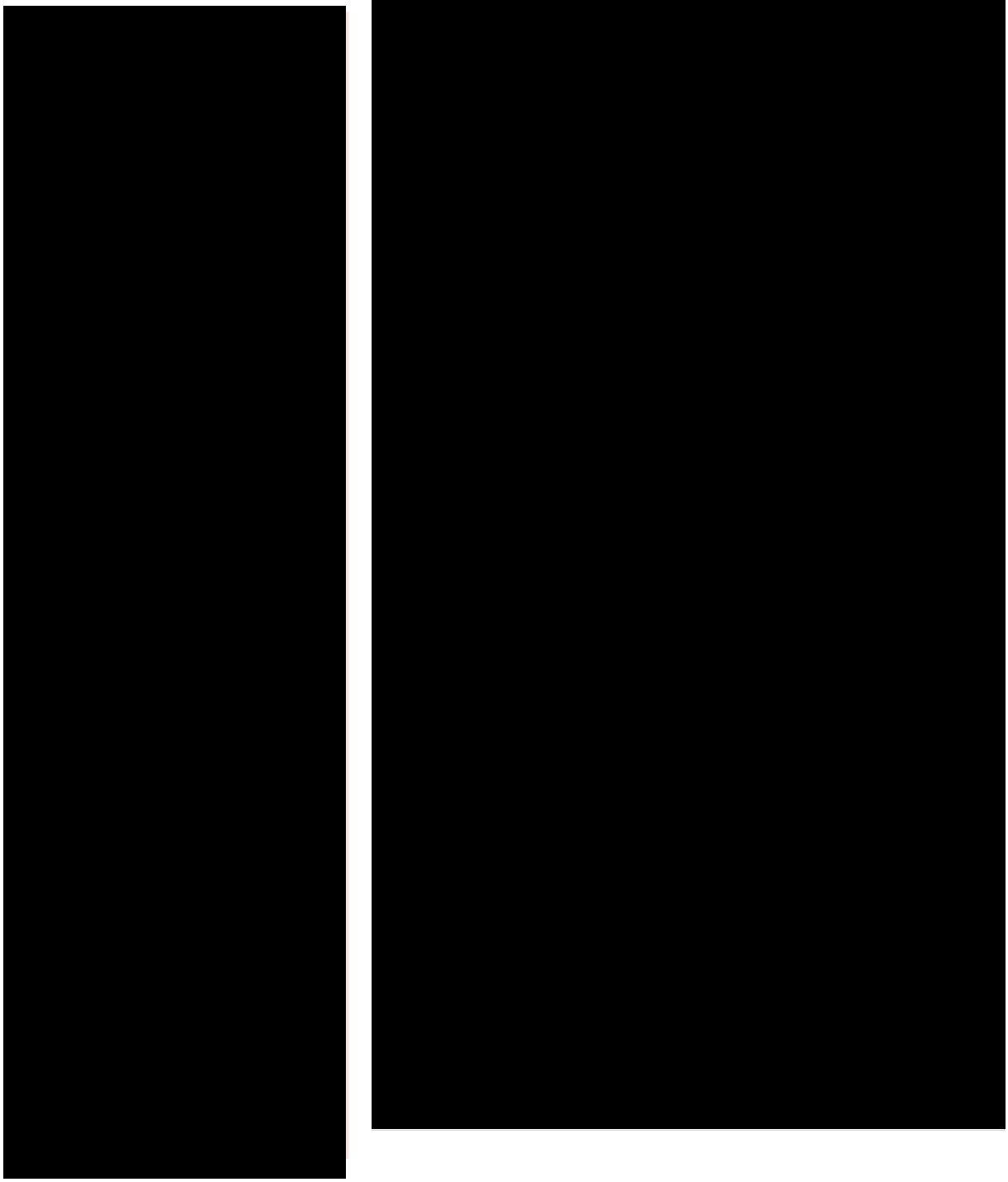


JESSICA CONNOR



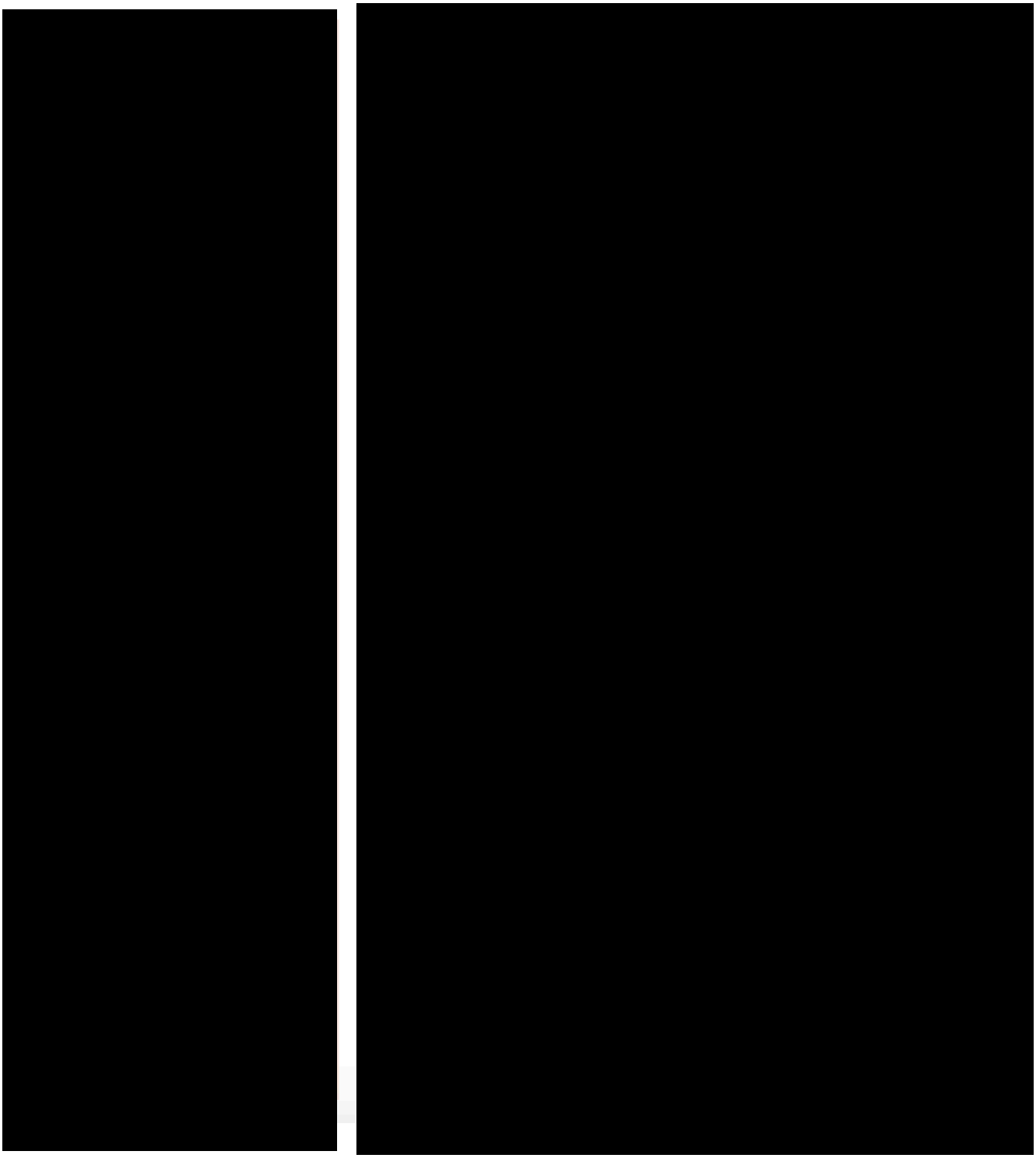
Response 24-419

JESSICA CONNOR



Response 24-420

JESSICA CONNOR



Response 24-421

Danisha Feliz

[redacted]

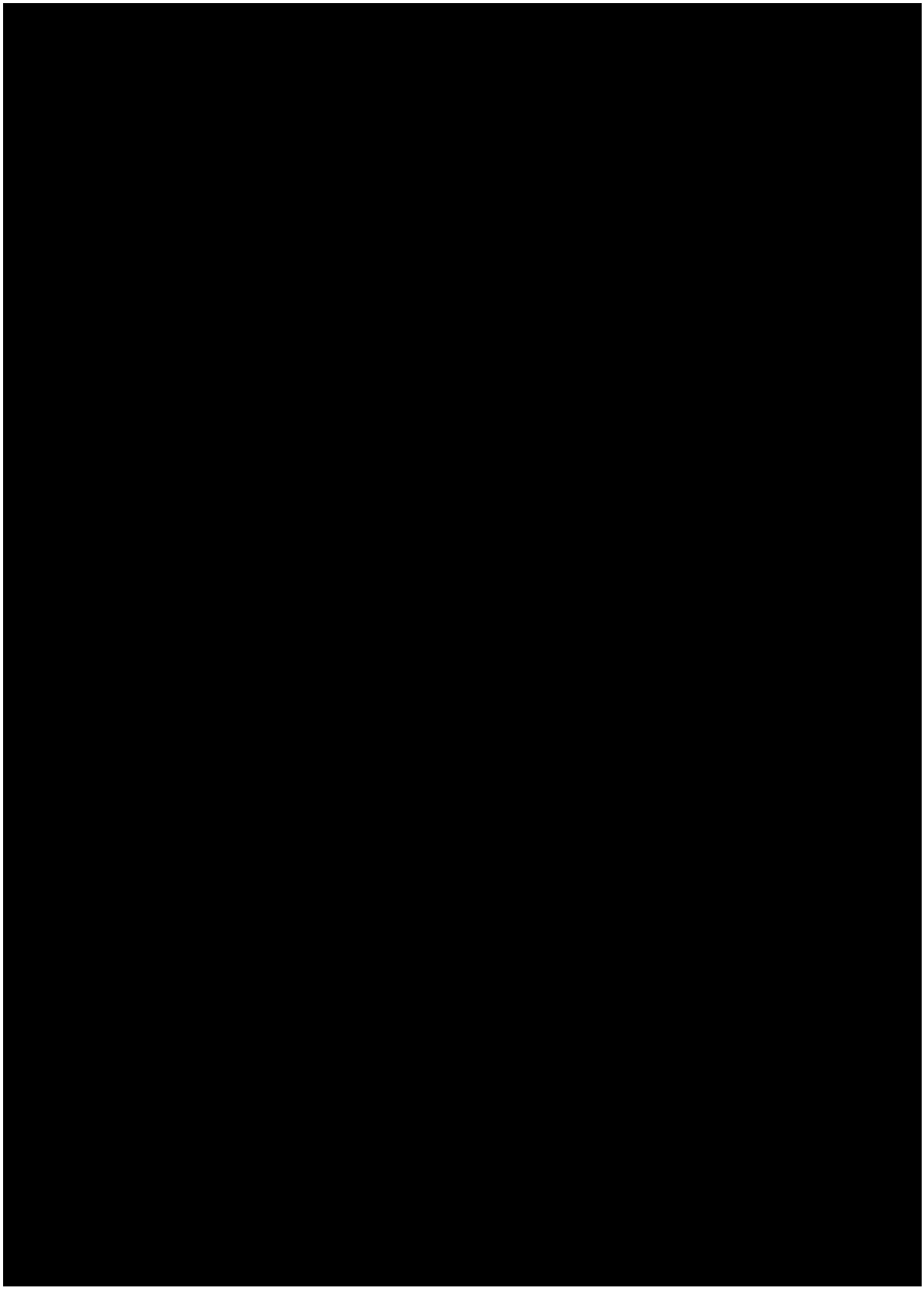
EDUCATION

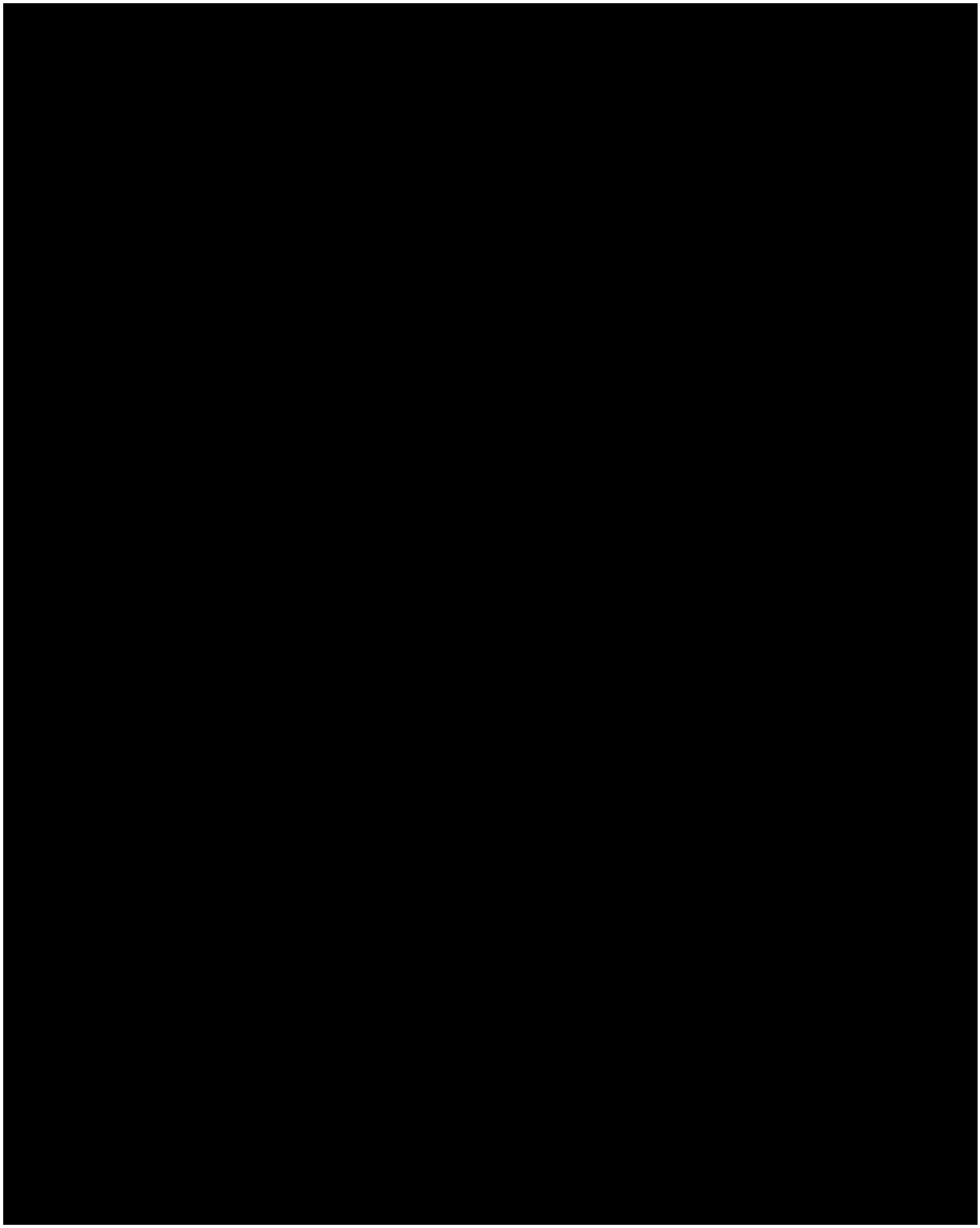
[redacted]

JOHANNA ELDRIDGE

[redacted]

[redacted]



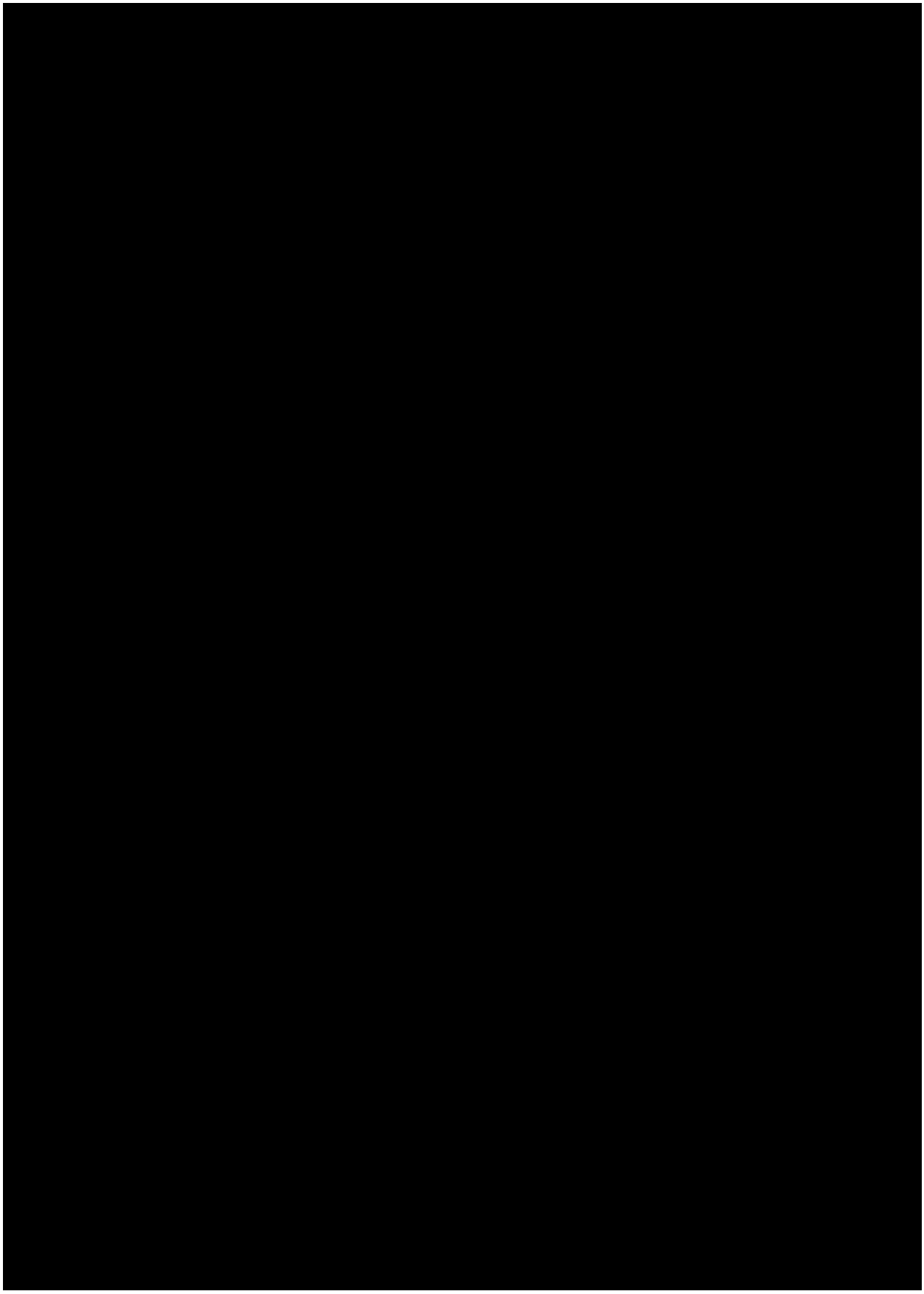


Stacey B. Hengsterman

[redacted]

[redacted]

[redacted]

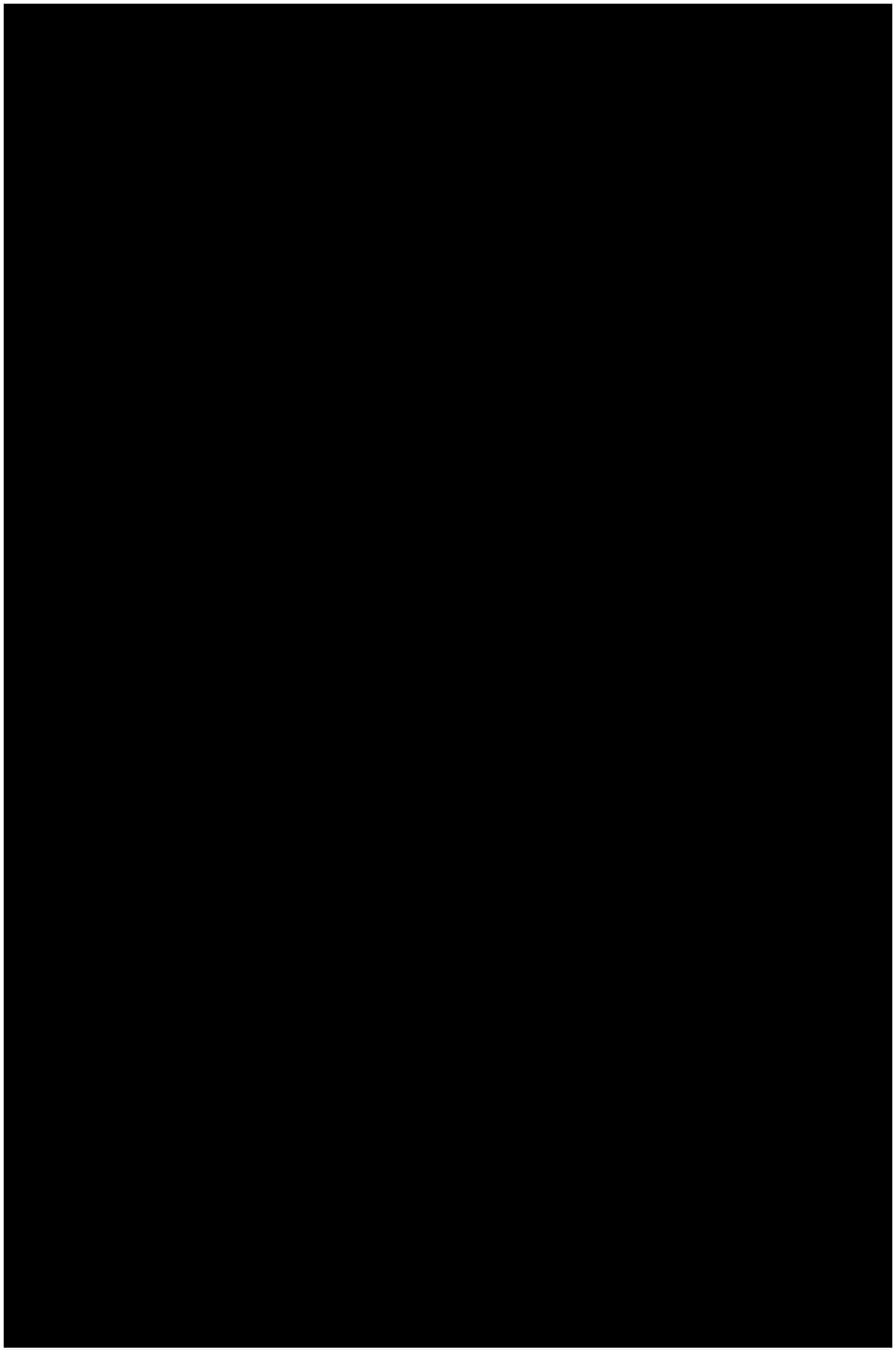


Asma Yasin

[redacted]

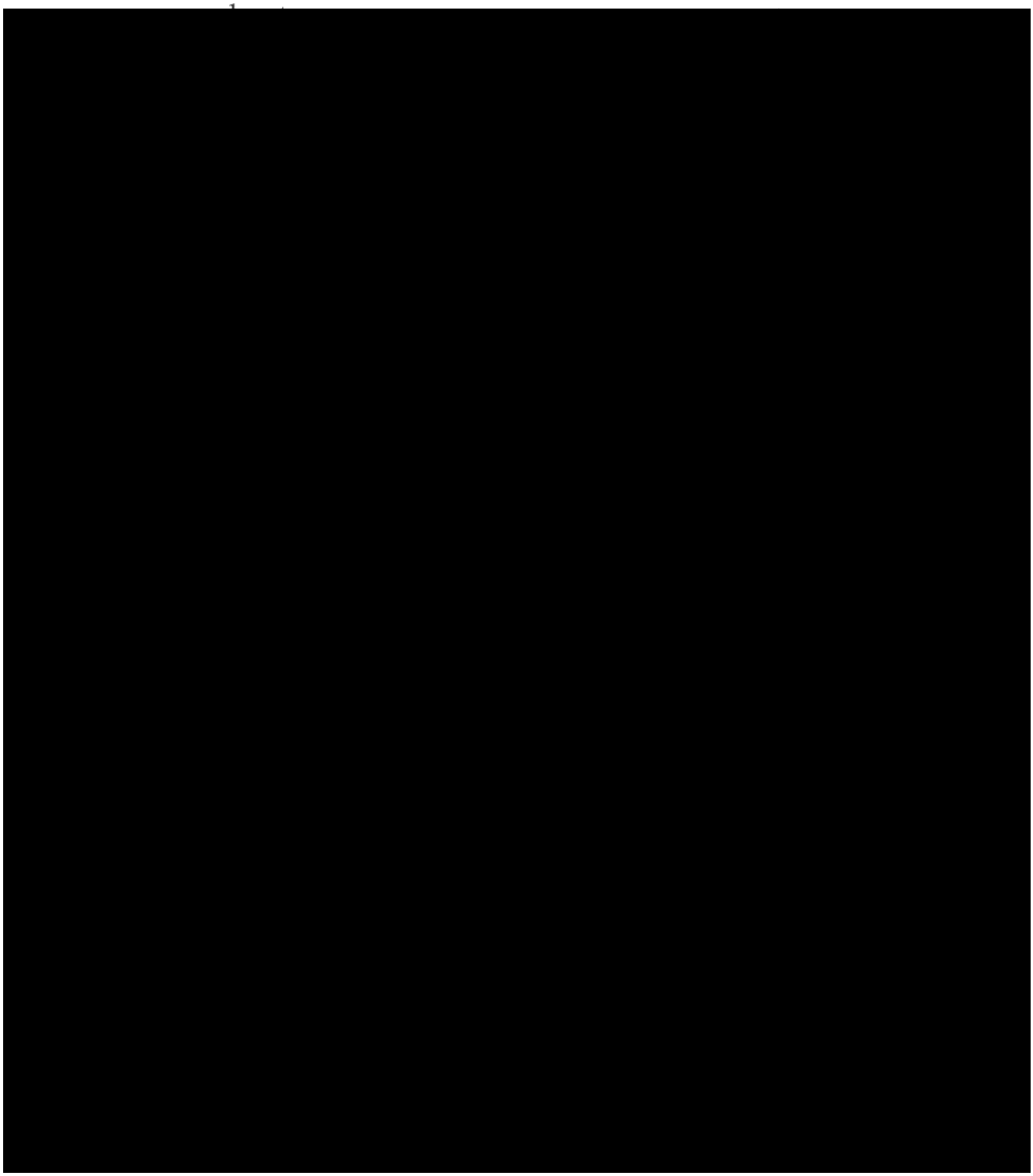
SUMMARY

[redacted]



Courtney Murphy

NYS Certified Teacher



R-14i - Board Member RFI Forms

Note: During our application phase we have utilized several naming conventions on social media and received feedback from our community re: our name. This is because our community embedded programs are built with community input, with each one room schoolhouse eventually being named after a flower. A placeholder in initial conversations and social media posts contained the phrases 'Wildflower Montessori Upstate New York' (as an umbrella charter name) with our proposed first classroom named 'Ballston Spa Montessori' as a placeholder for the name that future Teacher Leaders choose (all Wildflower schools are named after a Wildflower). As such, board members may have referred to *former* names in documentation.

WUNYCS may be referred to as the following in board members RFI's (Prior naming conventions):
Wildflower Montessori Upstate New York
WUNYCS
And Ballston Spa Montessori

Moving forward we will solely be utilizing **WUNYCS** in all documentation, communication, and social media outreach.

The following board member request for information forms are located on the following pages:

Name	**Position on Board**	**Page Number(s)**
Julia Franklin	Board Chair	2-7
Leah Ferrone	Board Vice-Chair	8-13
Ruhi White	Board Treasurer	14-19
Jessica Connor	Board Secretary	19-25
Danisha Feliz	General Board	26-31
Johanna Eldridge	General Board	32-37
Stacey Hengsterman	General Board	38-43
Asma Yasin	General Board	44-49

Julia

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

   Wildflower Montessori Upstate NY

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Julia continued:

ɹsign Envelope ID: 51D01066-B964-4219-B728-9997F15F00D1

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Julia continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:
Jessica Conner- she worked at KIPP Albany Community Charter School while I was working for the region (KIPP Capital Region). We did not interact but I am familiar with her name and that she was a SPED teacher there.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☐ I / we do not know any such employees. ☑ Yes.

Details:
Courtney Murphy- she was the Assitant Principal at KIPP Albany Community Charter School wile I was working for the region (KIPP Capital Region). We did not interact but I am familier with her name and her former position.

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Julia continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Julia continued:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Julia final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

    If the Director of the school is not involved, I would alert the director. Then, I would immediately notify SUNY and seek action s to remove that trustee from the board. If there was financial gains from the person in question, I would work to get that money reimbursed.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Julia Franklin, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Montessori Upstate NY is true and correct in every respect.

[redacted]

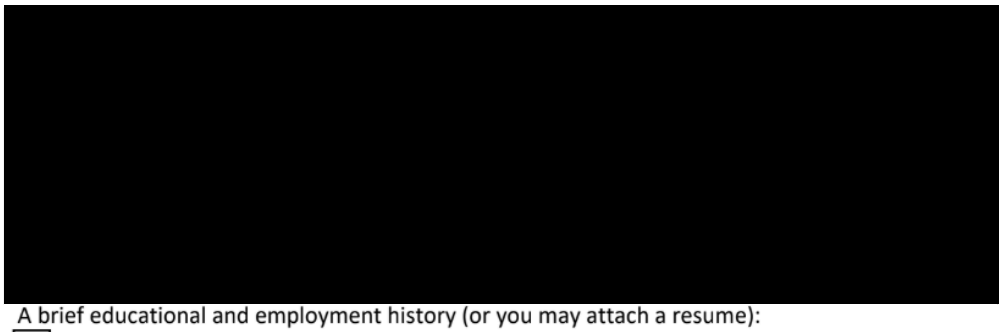
Signature Date

Leah:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Wildflower Upstate New York
2. Full name: Leah E. Ferrone



3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☐ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):
   Mechanicville Area Community Service Center

Leah continued-

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

   ☑ Does not apply to me. ☐ Yes.

   Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

   ☑ Does not apply to me. ☐ Yes.

   Details:

Leah continued-

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:
I met Ruhi White once at a co-working organization, and know of her work through that co-working community.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Leah continued-

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Leah continued-

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Leah (final):

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

In the event of suspected self-dealing, the Board of Directors would follow our by-law protocol. After collecting evidence to verify cause or intent, we would engage the involved trustee in an open communication about the matter, and then bring the trustee's removal to a Director vote.

As Vice Chair, I will work diligently to proactively review conflict of interest policies with Board of Directors regularly, to insure full comprehension of the nuances. With a board culture rich in cooperative communication and trust, we would foster a sense of empowerment in all Directors to exercise the Whistle Blower Policy.

Other

---

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☐ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Leah E. Ferrone, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Upstate New York is true and correct in every respect.

[redacted]

Signature Date

Ruhi:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

Wildflower Upstate New York

2. Full name: Ruhi White

[redacted]

3. A brief educational and employment history (or you may attach a resume):
[X] Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. [X] I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. [X] Does not apply to me. [ ] Yes.

Name(s) of School/Not-for-Profit Corporation(s):

Ruhi continued:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

[X] Does not apply to me. [ ] Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

[X] Does not apply to me. [ ] Yes.

Details:

Ruhi continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☒ Yes.

Details:

I met Leah Ferrone briefly at a summer event for Palette, a co-working membership company in Saratoga Springs, NY. The event was in 2024.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☒ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☒ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☒ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Ruhi continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☒ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☒ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☒ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Ruhi continued:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

[X] Does not apply to me, my spouse or family.

[ ] Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

[X] None.

[ ] Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

[X] None.

Ruhi final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would gather evidence, review our policies, report any concerns, recommend an investigation, and ensure accountability of the Board and leadership.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). [X] I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Ruhi White, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Upstate New York is true and correct in every respect.

[redacted]

Jessica:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Wildflower Upstate New York

2. Full name: Jessica Connor

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Jessica:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Jessica:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:
Asma Yasin - previous co-worker

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☐ I / we do not know any such persons. ☑ Yes.

Details:
Courtney Murphy - the lead applicant will serve as furture executive director. We worked together for 4 years.

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Jessica:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Jessica:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Jessica final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would ensure that I have clear, objective evidence to support my suspicions. This could include financial records, communications, or any other documentation that points to self-dealing behavior. I would then report the situation through the appropriate internal channels.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☒ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Jessica Connor, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Upstate NY is true and correct in every respect.

[redacted]

Danisha:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Wildflower Montesorri Upstate NY
2. Full name: Danisha Feliz

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Danisha continued:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Danisha continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Danisha continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☐ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☐ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Danisha continued;

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Danisha final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

If I believed that one or more members of the education corporation's board were involved in self-dealing, I would take a thoughtful and systematic approach to address the situation while prioritizing the integrity of the organization and the well-being of its stakeholders.
First, I would thoroughly document the concerning behavior, gathering any relevant facts, communications, or records that suggest self-dealing. It is important to rely on objective evidence rather than assumptions.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Danisha Feliz, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Montesorri Upstate NY is true and correct in every respect.

[redacted]

Johanna:

Request for Information
Prospective Charter School Education Corporation Trustee Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Wildflower Upstate New York
2. Full name: Johanna Eldridge

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Johanna continued:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Johanna continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☐ I / we do not know any such persons. ☑ Yes.

Details:
I know Courtney Murphy through my husband David Eldridge. David and Courtney went to high school together and graduated in 2005. We are friendly and have visited each other on social occasions about once every other year.

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Johanna continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Johanna continued:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☐ None.

☑ Yes.

Details:
I have four children (currently aged 1, 3, 5, and 7 years) who could be eligible to attend the school and may end up being a parent of a school student.

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Johanna (final):

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

If there were a situation where I were to believe one or more board members to be involved in self-dealing, I would take the following steps to help address the matter while hopefully maintaining professionalism and saving space for potential innocence and/or misunderstanding. First, before taking any formal action, I would attempt to determine concrete evidence of any potential self-dealing activities - any documentation that could suggest unethical behavior. Next, I would report the matter to the board chair. I would hope this would be followed up with an investigation by an appropriate entity (third-party, if needed).

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Johanna Eldridge, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Wildflower Upstate New York is true and correct in every respect.

[redacted]

Signature Date

Stacey:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Wildflower Upstate NY
2. Full name: Stacey Hengsterman

[redacted]

☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ ~~I affirm~~.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ ~~Does not apply to me.~~ ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Stacey continued:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Stacey continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Stacey continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Stacey continued:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☑ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Stacey final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

[redacted]

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Stacey Hingston certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of _____ is true and correct in every respect.

[redacted]

Asma:

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

   Ballston Spa Montessori

2. Full name: Asma Yasin

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

Asma continued:

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Asma continued:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:
I know Jessica Connor, also a trustee/board member on this school, from having formarly worked with her at Kipp Albany Community Charter School (2022-2024)

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Asma continued:

Asma continued:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Asma continued:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

    ■ Does not apply to me, my spouse or family.

    ☐ Yes.

    Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

    ☑ None.

    ☐ Yes.

    Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

    ☑ None.

Asma final:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would inform the board president of my suspicions

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Asma Yasin, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Ballston Spa Montessori is true and correct in every respect.

[redacted]

R-15 - District Relations

a. Relationship Strategies

WUNYCS is committed to fostering a collaborative and productive relationship with Ballston Spa Central School district to ensure alignment with community needs and maximize educational opportunities for all students. We recognize that partnerships and open communication with the district are essential for a cohesive educational ecosystem, and we will actively engage in dialogue and cooperative efforts to support students and families. These conversations are already underway, and awareness has quickly spread through word of mouth within our close-knit "Village of Friends." Given that Courtney is a lifelong member of the community, having attended BSCSD schools from kindergarten through 12th grade and later working in BSCSD schools for nearly five years, she maintains deep-rooted connections to both the local educational landscape and the broader community.

We have already initiated discussions with local organizations within the district throughout this application process such as BARC (Ballston Area Recreation Commission) and BACC (Ballston Area Community Center), our local Ballston Spa Public Library, Malta's Town Supervisor, Ballston Spa's Mayor, Ballston Spa's Board of Ed/Superintendent of Schools, our Title 1 elementary school's PTA (Wood Road Elementary- who provided a letter of support for our endeavor), local organizations dedicated to serving people with disabilities such as SBANY's, AIM services, and Saratoga Bridges, and community members. All community engagement thus far has had a positive response (and we have had ongoing transparent conversations with the mayor regarding hesitancy around our budget- encouraging the village board to recognize our model is a micro-school and intends to stay that way). We will continue forming partnerships with other local community organizations aligned with our mission and vision in hopes of creating a broader inclusive community of partnerships. Additionally, we will maintain outreach efforts with local programs or businesses we haven't heard back from in our recent outreach efforts, with the goal of establishing partnerships, shared resources, and regular correspondence.

Our strategy for establishing and maintaining an ongoing relationship with the district includes:

- Formal Communication Channels: We will seek regular meetings with district representatives to discuss enrollment, special education coordination, transportation, and professional development opportunities.
- Collaboration on Shared Services: Exploring ways to cooperate on student services, including special education supports, extracurriculars, and transportation.
- Participation in District-Wide Initiatives: We will engage in local school board meetings, district-led events, and inter-school collaborations to remain actively involved in broader educational discussions.
- Transparent Data Sharing & Compliance: Ensuring that relevant data, compliance reports, and student performance insights are shared as required, fostering accountability and alignment with district expectations.

While we foresee opportunities for mutual learning and resource-sharing, we also recognize potential challenges such as navigating funding allocations, coordinating special education services, and addressing misconceptions about charter schools. We have not encountered any opposition thus far; however, we anticipate the need for ongoing clarification as we progress through the application phase. Since Ballston Spa does not currently have any charter schools, public perceptions and understanding of charter schools may require further clarification. Some prospective families have expressed misconceptions, such as assuming charter schools operate as private institutions or questioning whether immunization requirements apply under the assumption that the school would be private. Other families questioned if we accept students with IEPs, to which we clarified our model is specifically built with students with disabilities in mind. These conversations have helped us create social media engagement strategies aligned to clarifying potential misconceptions about what a charter school is and what we hope to do for our community.

To address these and potential future misunderstandings, we have proactively engaged in community outreach and social media efforts to reinforce that WUNYCS is a public school and operates under the same regulations as other public institutions. Our approach has prioritized transparency and accessibility, ensuring that any recurring questions received through private inquiries are also addressed publicly to provide clarity to the broader community. This ongoing dialogue is intended to foster trust, engagement, and an accurate understanding of our mission as we work toward bringing the first public Montessori option to upstate New York.

To mitigate these potential challenges, we will remain transparent, responsive, and proactive in our district engagement efforts, ensuring a collaborative rather than competitive relationship. Since Ballston Spa currently does not have a charter school, we have proactively engaged in outreach and discussions to clarify what charter schools are, how they operate, and how we seek to contribute to the district's educational landscape rather than compete with it. Given that charter schools may be unfamiliar to local stakeholders, we want to ensure that the Board of Education and the Superintendent, as well as all other stakeholders, are fully aware of our mission, vision, and operational structure. Additionally, we hope to emphasize our goal of remaining a micro-school, adding to the landscape without divesting a large percentage of enrollment nor finances from our already established public elementary programs in the district.

By consistently engaging with the district and community partners, WUNYCS seeks to contribute to a strong, inclusive educational landscape that benefits all students while upholding our mission of student-centered, inclusive, and high-quality Montessori education. We are committed to proactive transparency, ongoing dialogue, and a collaborative approach to addressing any concerns. By continuing these outreach efforts, we seek to position WUNYCS as a valuable addition to the educational landscape, providing an innovative, public Montessori option for families in the community.

b. School Partnerships

While Ballston Spa Central School District (BSCSD) is not considered a low-performing district, an analysis of student performance metrics, particularly in math and ELA scores, indicates that overall proficiency levels are average. With proficiency rates hovering around 50% in core subject areas, this data suggests that half of the student population is not meeting state proficiency benchmarks, which highlights a critical opportunity for improvement. A 50% proficiency rate, while not classified as "failing," does not necessarily represent a strong academic outcome, and there is significant room to enhance instructional strategies, individualized learning, and student engagement that could lead to higher proficiency scores.

WUNYCS seeks to contribute to the region's educational landscape by offering a Montessori-based approach that prioritizes student-centered learning, individualized instruction, and hands-on engagement with core concepts. Through this innovative public school model, we aim to support students in building stronger foundational skills in math and literacy while also nurturing executive functioning, critical thinking, and intrinsic motivation for learning. Montessori education is a holistic curriculum that emphasizes hands-on learning, individualized instruction, and the development of the whole child—academically, socially, and emotionally. BSCSD's elementary school program relies heavily on standardized test metrics to assess student learning. Montessori utilizes a variety of assessment methods, including student portfolios, observational assessments, and student-led conferences, to capture a more comprehensive view of each child's progress. This approach ensures that students are not only meeting academic benchmarks but also developing critical thinking, independence, and a deep love for learning.

We believe that standardized testing is not the only measure of a school's success. We seek to partner on other aspects such as social emotional learning. For example, at Ballston Spa Central School District's Wood Road Elementary, a dated token economy system remains in place as a primary behavior management tool. When volunteering in her daughter's classroom this year, Courtney Murphy, lead applicant, was surprised to see this same behavior management tool being utilized since the exact same strategy was utilized in BSCSD when she attended elementary school 30 years prior. While this model may yield short-term compliance, it relies heavily on extrinsic motivation through a bi-weekly school store of 'prizes', which can hinder the development of intrinsic values such as empathy, curiosity, and self-regulation. This system may unintentionally disadvantage students with disabilities or trauma histories, who often struggle with consistency in earning rewards and may feel publicly shamed or excluded. As educational best practices continue to evolve, relying on a token-based model raises concerns about equity, sustainability, and long-term behavioral growth. We hope to build strong relationships with the local school board and PTA by partnering to share best practices that foster meaningful, student-centered learning. Our goal is to contribute to a culture of collaboration where we can exchange ideas on how to effectively engage students in lessons that promote curiosity, independence, and intrinsic motivation—rather than relying on external rewards. We believe this type of shared learning benefits all students in our community and aligns with our mission of fostering a more inclusive, innovative, and responsive educational

environment.

By bringing a Montessori charter option to Ballston Spa, we introduce a model that could help bridge the gap in educational approaches within the district. While BSCSD educators work hard to support their students, incorporating more holistic assessments and hands-on, experiential learning—as Montessori does—could provide valuable insights for educators seeking to enrich their own instructional strategies. Our presence will not only provide an alternative for families but also contribute to the broader educational landscape by demonstrating the effectiveness of individualized, student-centered learning- especially for families who may be zoned in Wood Road where the lowest standardized performances have been occurring.

To foster collaboration with existing schools, we are committed to sharing best practices, offering professional development opportunities, and engaging in open dialogue with local educators and district leadership. Wildflower Schools operate on a decentralized network- offering to share resources far and wide- and we will continue this practice with our local district and anyone other local stakeholders interested in learning more about Montessori pedagogy. By partnering with schools that seek to enhance instructional strategies, we can provide insight into Montessori methods, interdisciplinary learning, and differentiated instruction. Additionally, our model's emphasis on inclusion and special education supports can provide valuable insights into how to better serve students with diverse learning needs through our pedagogy. Through ongoing collaboration and knowledge exchange, we hope to enhance educational opportunities for all students in Ballston Spa and surrounding communities.

We have developed the following proposed timeline of planning regarding partnerships with BSCSD:

WUNYCS Partnership & Best Practices Sharing Timeline

WUNYCS is committed to building strong relationships with Ballston Spa Central School District (BSCSD) and the broader community to foster collaboration, shared learning, and meaningful educational opportunities. Our timeline outlines a multi-phase approach, including a 'Year Zero' plan to ensure early engagement with families, local organizations, and district schools before opening. We have already started some of this outreach during our application phase, and received a letter of support from the Wood Road Elementary Parent Teacher Association. We hope to partner further with each elementary PTA throughout year zero and beyond.

Year Zero: Pre-Opening Outreach & Partnership Development (12-18 Months Before Opening)

Goal: Build Awareness, Establish Community Partnerships, and Ensure Strong Enrollment (Months 1-6):

- Community Engagement & Enrollment Outreach:

    - Host information sessions for prospective families, ensuring clarity on our Montessori model, enrollment priorities, and accessibility for all students.
    - Attend local events, farmers' markets, and community gatherings to introduce WUNYCS to the public.
    - Launch a dedicated enrollment campaign, prioritizing outreach to economically disadvantaged families and students with disabilities through local partnerships.
    - Partner with the local PTA's, spreading awareness about our unique model and efforts.

- Partnership Development:

    - Continue outreach efforts with local organizations, such as AIM Services, Saratoga Bridges, and Inclusive Saratoga, to establish relationships that support diverse learners.
    - Strengthen connections with BACC, BARC, and other community programs to integrate Montessori philosophy and best practices into collaborative initiatives.

- District Collaboration:

    - Schedule introductory meetings with BSCSD leadership, principals, superintendent, and special education coordinators to explore areas for partnership and knowledge-sharing.
    - Reach out to each elementary school PTA to schedule introductory meetings and share our goals and mission/vision.
    - Discuss potential opportunities for cross-school learning exchanges and joint professional development efforts.

Goals for Months 7-12:

- Enrollment & Family Engagement:

    - Begin student application support sessions, assisting families with the charter school lottery and enrollment process.
    - Offer parent workshops on Montessori education, providing hands-on experiences with Montessori materials, self-directed learning, and executive functioning skill development.
    - Continue building strong communication channels with families via newsletters, social media, and one-on-one meetings (when comfortable, home visits with prospective families).

- Formalize School Partnerships:

- Establish Memorandums of Understanding (MOUs) with community organizations and service providers to ensure wraparound support for students.
- Develop an advisory group of local educators, community leaders, and parents to guide WUNYCS's integration into the local educational landscape.

Year One: Implementation & Initial Collaboration

Goal: Establish Working Relationships with District Schools and Begin Best Practice Sharing

Trimester 1 (First 3 Months):

- Organize a Montessori Best Practices Open House, inviting district educators to observe classroom environments, student-led learning, and mastery-based progression.
- Host a panel discussion on alternative assessment models, focusing on student portfolios and student-led family conferences. Invite local special education teachers to provide alternate means of assessing student proficiency towards IEP goal tracking.
- Initiate mentoring opportunities, where district teachers can visit and exchange instructional strategies with Montessori-trained educators.

Trimester 2 (Months 4-9):

- Launch a teacher-led professional development session open to local teachers on:
    - Differentiated instruction and multi-age classroom strategies
    - Inquiry-based learning and student autonomy
    - Culturally responsive teaching within Montessori settings

Trimester 3 (Months 10-12):

- Establish an annual Montessori & District School collaborative meeting, bringing together educators to discuss ongoing challenges, successes, and collaboration opportunities.
- Evaluate Year 1 partnership efforts and adjust strategies for continued engagement in Year 2.

Year Two & Beyond: Strengthening Partnerships & Expanding Impact

Goal: Deepen Collaboration with District Schools & Broaden Montessori-Inspired Practices

Year 2-3 Initiatives:

- Implement a joint student project initiative, where Montessori and district students collaborate on cross-disciplinary learning experiences (e.g., a science fair, an art exhibit, or community service initiative).
- Expand partnerships with BSCSD special education teams to align best practices for inclusive education and differentiated supports.
- Work with district leadership to explore curriculum enhancements, integrating Montessori-inspired methodologies into traditional classrooms.

Year 4-5 Long-Term Planning:

- Develop a formal professional development exchange program, offering district educators opportunities for Montessori training, while Wildflower educators gain insights from district specialists.
- Conduct a multi-year impact assessment, evaluating the effectiveness of Montessori aligned strategies in district classrooms and identifying potential expansion opportunities.
- Establish a permanent advisory committee between WUNYCS and BSCSD to sustain ongoing collaboration and continuous improvement efforts.

WUNYCS is dedicated to engaging with district schools and the broader community from the very beginning. By implementing a Year Zero outreach strategy, establishing early partnerships, and prioritizing knowledge-sharing with district educators, we aim to create a lasting, positive impact on the region's educational landscape. Through ongoing collaboration and a commitment to innovation, WUNYCS will contribute a unique and effective Montessori-based learning model that expands student opportunities, enhances educational outcomes, and fosters a thriving community of learners.

R-16ac - Facilities

a. Facility Needs

WUNYCS is dedicated to embedding itself within the local Ballston Spa community, ensuring that our school is not just located in the area but is truly a visible, accessible, and integral part of it. While we are exploring shopfront-style locations, our priority is securing a space that aligns with our Montessori philosophy while also meeting the current zoning requirements of our village. We have been in discussion with our mayor regarding current zoning/rezoning that is to occur in our village, as well as the use of special permits when/if applicable. April 3, 2025 is when public comment will begin regarding our rezoning and WUNYCS plans to be involved by making public comment around the benefits to opening a school in a shop front setting. In general, while a shopfront setting in the heart of our small village would best align with our mission/vision, we envision a space that may not be a shopfront, but holds the shopfront mentality and feeling.

The shopfront mentality at WUNYCS goes beyond the physical space. It's about being deeply embedded in the community, accessible, and seen as part of the neighborhood fabric. While a shopfront location would provide immediate visibility and accessibility, the core philosophy remains the same regardless of our final site: we aim to create a welcoming, inclusive, and open environment where families, students, and community members feel a sense of connection and belonging.

If a shop front space is not secured, we will still prioritize the same values by ensuring our school is centrally located, easy to access, and designed to foster interaction with the broader community. This means:

- An open-door approach that encourages family engagement, volunteerism, community partnerships and transparency.
- A space that reflects our commitment to inclusion, ensuring that all families—especially those with children who have disabilities—feel supported and welcome.
- A strong connection to the local landscape, forming partnerships with businesses, libraries, and local organizations, some of which we've already started, to bring learning beyond the classroom walls.
- A Montessori environment that feels intimate and community-centered, regardless of the building itself, through intentional design, student-led learning, and parent involvement.

The shopfront mentality is not just about location—it's about fostering a school culture that is visible, approachable, and meaningfully engaged with the community we serve. We are actively engaged in facility exploration, reviewing multiple options in partnership with real estate agents and community stakeholders. Given the time between submitting this application and school approval, we do not expect to finalize a site immediately, but we will be prepared to

secure the ideal space upon approval of our charter.

Ensuring full ADA compliance is a non-negotiable part of our facility selection process. We recognize the importance of providing ample, well-designed space for non-ambulatory students and families, ensuring accessibility for all. Our school will go above and beyond state standards, prioritizing open, adaptable spaces that allow for both specialized support and independent learning. Our Montessori classrooms will be flexible and dynamic, designed to foster movement, collaboration, and individualized instruction, rather than the rigid structure of traditional classrooms. This approach will ensure that every student, regardless of ability, can navigate and thrive in an environment built with inclusion, accessibility, and community integration at its core.

WUNYCS is committed to ensuring that our school facilities meet and exceed New York State requirements for classroom space, particularly as we serve a diverse student population, including students with disabilities. Our micro-school model will begin with one classroom and grow slowly across 5-8 years, adding classrooms as demand grows. We envision a full build out years down the line to include 6 total classrooms (2 primary, 2 lower elementary, and 2 upper elementary).

As such, in alignment with New York State guidelines, kindergarten classrooms require 900 square feet to accommodate a class size of 20 to 22 students, ensuring approximately 41 to 45 square feet per student. However, given that we will enroll students with disabilities, including those who may be non-ambulatory, as well as a slightly higher proposed total class size in future years (24 in each Montessori grade band at full build out) we will exceed standard classroom space requirements to ensure full ADA compliance as a proactive measure. New York State regulations recommend 60 square feet per student for non-ambulatory students, which we will incorporate into our space planning to ensure unobstructed movement, accessibility, and an inclusive learning environment in the event we do have a non-ambulatory student. It is with this in mind that we will require a space in year one that is at minimum roughly 1,000 sq. feet, and/or locate space we can grow into so that in year 2-3 and beyond we can continue to ‘grow into’ the space. It is our hope that we create a second site with a similar model (1,000 sq. feet) to accommodate 3 classroom spaces (second primary site, second lower elementary site, and second upper elementary site).

Our classrooms will reflect the Montessori philosophy, with open, adaptable spaces rather than the more traditional rows of desks. This will allow for flexible configurations to accommodate hands-on learning, movement-based activities, and individualized instruction. As we grow, we will continue prioritizing spacious and accessible environments to support the diverse needs of our students, ensuring that every child, regardless of ability, has the space and support they need to thrive.

As a Montessori micro-school committed to inclusive education, we anticipate a higher-than-average enrollment of students with disabilities due to our enrollment priorities (20% goal of recruitment as opposed to our district's current 18% average). To meet the needs of these students, we will go beyond the minimum NYS classroom space requirements and ensure that our facility includes:

Dedicated Special Education and Intervention Space:

- We will reserve at least one additional space to provide potential pull-out services, therapy sessions, and small-group instruction for students with IEPs or requiring Tier 2 and Tier 3 interventions and/or evaluation (IEP goal tracking, NYSESLAT individualized assessments, and so on).
- This space will also serve as a sensory-friendly environment for students needing de-escalation, movement breaks, or quiet workspaces.

ADA-Compliant Common Spaces:

- Given that we will serve students with disabilities, we will ensure that all hallways, common areas, and multipurpose spaces are fully ADA-compliant, allowing for unobstructed movement and accessibility for the possible enrollment of non-ambulatory students and/or their families.

By integrating these dedicated learning spaces, we will exceed NYSED guidelines and ensure that every child, regardless of their learning needs, has access to individualized, high-quality instruction and support.

Given the micro-school model of WUNYCS, the need for large administrative spaces will be minimal. However, we will ensure that designated areas within our facility support essential operations while maintaining an open, student-centered environment. We plan to design a section of each classroom in order to accommodate essential administrative tasks and support services (For example: teacher sized desks, our designated locked space for student records, a wall divider to be pulled out as necessary for privacy). In addition to our six classrooms, each roughly 1,000 square feet, WUNYCS will allocate additional space to support special education services, English Language Learner (ELL) instruction, and small group instruction as necessary. This space will also serve as a meeting area for families, service providers, or co teacher-leaders to check in with one another in a more formal manner.

Administrative Functions:

- Instead of a dedicated administrative office, administrative tasks will be integrated into designated spaces within classrooms or shared common areas.
- Teacher Leaders, who serve both instructional and administrative roles, will have workspace within each classroom to complete necessary documentation, coordinate logistics, and manage communication with families. We may utilize a foldable wall divider in the event a more secluded area must be utilized as needed for individualized assessment (example: IEP goal tracking one on one with minimal distractions, location for assessment for ELL's, etc).

Food Services:

- As a Montessori micro-school, students will have opportunities to participate in meal preparation as part of Practical Life learning.
- A small kitchen or kitchenette area will be included for food storage, preparation, and distribution of meals and snacks within each classroom space or a centrally located shared space within each micro-school to be shared by multiple classrooms if necessary.
- If meals are to be provided by an external vendor/through the district, a designated staging area will ensure smooth delivery and distribution.

Nurse's Office & Health Services:

- As needed and dependent upon enrollment, a dedicated health services space will be included for student medical needs, minor injuries, and wellness support.
- WUNYCS will contract with a licensed school nurse to ensure that all health services comply with New York State laws and regulations. In accordance with NYSED guidelines, we will engage a Registered Nurse (RN) to oversee student health needs, administer medications, and provide necessary medical interventions as required by state-mandated school health policies.
- Recognizing that students with disabilities may require specialized medical care, we are committed to ensuring that our contracted school nurse is fully equipped and trained to provide appropriate accommodations. This includes managing Individualized Healthcare Plans (IHPs), administering medications and treatments as outlined in students' Individualized Education Programs (IEPs) or 504 Plans, and ensuring ADA-compliant accessibility to health services.
- Our nurse's office will be designed to maintain student privacy, provide adequate medical support, and comply with all necessary health and safety protocols. By contracting with a professional school nurse, we will uphold the highest

standards of student health care, ensuring that all students, especially those with disabilities, receive the medical attention and accommodations they need to thrive in our learning environment.

Physical Education & Movement Space:

- Montessori education integrates movement into daily learning, reducing the need for a traditional gymnasium.
- Physical education activities will take place in flexible, multi-purpose spaces or outdoor areas, depending on the facility.
- If located within a larger shared facility, we will seek access to nearby parks, community centers, or designated activity spaces for physical education. We have been in discussion with both Ballston Area Recreation Center and Ballston Area Community Center for future partnerships and use of facilities and fields for various community events and use of space.

By prioritizing flexibility and efficiency, we will optimize available space while ensuring that all key functions are met in compliance with NYS regulations.

WUNYCS will not offer a residence program to students.

b. Facility Selection

We have not yet secured a facility but have been actively engaging in discussions with Oxford Property Group realtors (two community members who offered to assist us in application phase 'searches' for space that could potentially meet our square footage requirements). We've also been in discussion with Ballston Spa's Mayor regarding the upcoming rezoning initiative, which is set to begin its public comment period on April 3, 2025. WUNYCS will participate in public comment periods to explore community perspectives on potential school locations, including the feasibility of shopfront spaces or other designated areas for educational use whether through outlined areas permitted for school use or through the use of special permits.

Oxford Property Group has provided several potential locations that align with our facility requirements in terms of size, including spaces that we could "grow into" as our school expands, including a recently closed former daycare which lost their license, as well as a former 'Well Now' urgent care center that for whatever reason never came to fruition in their plans. While some options may exceed our Year 1 space needs, they offer the flexibility to accommodate long-term growth and ensure stability in our expansion plan. We will continue to evaluate these options collaboratively with local officials, property stakeholders, and community members to identify a suitable and sustainable location for our school if approved for our charter.

We are committed to ensuring that our selected facility will fully comply with all required regulations before the start of our first year of operation. Our chosen location will meet New York State Education Department (NYSED) requirements. Additionally, we will adhere to state sanitary specifications to ensure a safe, healthy, and fully compliant learning environment for all students and staff. We will work closely with local officials, property management representatives, and regulatory agencies to ensure that our facility is approved, inspected, and ready for students upon opening.

Our approach includes working closely with NYSED's Facilities Planning Division to confirm compliance with square footage, occupancy limits, fire safety, and ventilation requirements. Additionally, we will engage with the New York State Department of Health (NYSDOH) and local health departments to confirm that all sanitary and accessibility codes are met. To ensure full compliance, we will collaborate with facilities experts specializing in educational environments. These professionals will conduct thorough site evaluations and assist in obtaining any required permits or approvals for renovations that may be necessary before finalizing a lease.

Oxford Property Group has already shared multiple locations that meet our facility requirements, including spaces that would allow us to grow into a larger footprint as our school expands over time. While we have not yet secured a facility, we are prepared to negotiate for space upon charter approval. Our budget includes conservative estimates for rental costs and, if necessary, any renovations needed to make the space suitable for a high-quality learning environment.

We remain dedicated to ensuring accessibility and compliance with all state and local regulations, particularly for students with disabilities who may require specialized accommodations. Our facility selection process prioritizes ADA compliance, ample classroom space for individualized instruction, and proper health and safety features. By proactively engaging with stakeholders, regulatory agencies, and real estate professionals, we will secure a fully compliant and well-equipped facility that aligns with our Montessori micro-school model and the needs of our student population.

Possibility of co-location

While have not yet secured a facility but have been actively engaged in discussions with Oxford Property Group and Ballston Spa's Mayor regarding the upcoming rezoning initiative, and will have a range of potential areas we may likely select as our future space once drafts of Ballston Spa's rezoning move to finalized zones. While exploring private facility options, in year 1 we may work with realtors to determine if any public facilities are available for co-location such as local churches or other potential rental properties that are co-located considering we are a one room schoolhouse of 16 kindergarten-1st grade students. Given our Montessori micro-school model, which emphasizes small, flexible learning spaces in hopes of utilizing direct street-level access, we anticipate that a traditional district building may not be a suitable match. If public co-location is not viable, we are fully prepared to move forward with a private facility and will apply for any rental assistance if applicable. Our budget accounts for conservative

estimates of rental costs and, if necessary, renovation expenses to ensure that our space meets all requirements.

Mitigating Delays

To mitigate potential delays, we will proactively work with facilities consultants who specialize in educational environments to conduct site assessments, obtain necessary permits, and oversee any required renovations. We will ensure ADA compliance, sufficient classroom space, and necessary administrative areas to support the needs of our students, staff, and special education services.

As part of our contingency planning, we are exploring multiple locations to ensure that we have viable alternatives in place as time moves forward, and will begin a more official search pending approval of this charter application. We are also assessing temporary solutions should unforeseen circumstances arise, including short-term leased spaces that could accommodate our program until a permanent location is finalized. Our careful planning, collaboration with local officials, and engagement with the community will allow us to secure and prepare a fully compliant facility in time for our school's opening while maintaining flexibility in our approach to ensure the best outcome for our students.

Public School Facility

We will not seek to be located in a public school facility. We do not anticipate co-locating within a public school facility as part of our initial facility plan. Our primary objective is to secure a leased space that meets our immediate needs while also allowing for potential expansion in alignment with our five to seven year growth plan. In the event of unforeseen circumstances, we are actively exploring contingency options, including short-term leased spaces that would provide a temporary solution until a permanent facility is secured. While co-location is not our preferred approach, it remains a potential backup option should it become absolutely necessary.

Oxford Property Group is not currently engaged in any contractual agreements with our application team. Any facility listings or potential property options shared have been provided as a courtesy by members of our local community.

c. Facility-Related Conflicts of Interest

We do not anticipate that The Wildflower Foundation or any partnering organization would own or lease a facility on our behalf.

R-16d - Facilities Documents

While we have yet to select an appropriate facility, and will wait until charter approval to do so, we have begun conversations with local community members who are supportive of our endeavor and attached email exchanges of our facilities inquiries here. We utilized the square footage price given for our projected budgeting and have attached communications here:

facilities inquiries Inbox ×

Courtney Soucy [redacted]
to ErinPulverRealtor — Fri, Mar 14, 2:44 PM

Hi Erin,
Thanks for hearing me out by phone! Part of my application as I mentioned requires us to find a rough estimate of average cost per sq foot of facilities that meet the requirements of our future micro-school.

In a class of roughly 25 students requiring 60 sq feet of indoor space, in total we would need a space that is at least 1,500 sq feet. I need to determine three possible locations in Ballston Spa preferably so we can find the cost per sq foot per year on average in the area.

Unfortunately- one such space is Malta which I really don't want to do b/c they already have a Montessori program in Malta and I'm not trying to be competitive with established Montessori programs. Here is the malta location though:

[redacted]

Could you help me find a potential 3rd or even 3rd and 4th location in Ballston Spa (preferably NOT Milton/Malta) so that we can get an average cost per sq foot per year?

Let me know! I appreciate it.
Courtney

Courtney Soucy [redacted]
to ErinPulverRealtor — Fri, Mar 14, 3:01 PM

[redacted]

On Mar 14, 2025, at 2:44 PM, Courtney Soucy [redacted]
•••

Erin Pulver
to me — Fri, Mar 14, 5:53 PM

Got it! Let me see what I can come up with :)

On Mar 14, 2025, at 3:01 PM, Courtney Soucy [redacted]

Erin Pulver
to Leanna, me

Mar 19, 2025, 9:06 PM (13 days ago)

Hey Courtney,

After reviewing everything, I think this might be a little outside my scope. However, I have a fantastic contact for you—Leanna Pace. I've worked with her for years, and she's an expert when it comes to commercial real estate. I truly believe you'd be best served with someone like her on your side.

I'm cc'ing her here so she can step in and help. Of course, I'm happy to offer any insight or opinions where needed, and I really appreciate you thinking of me for this!

Looking forward to seeing how it all comes together for you.

[redacted]

Courtney Soucy [redacted]
to Erin, Leanna

Mar 19, 2025, 9:20 PM (13 days ago)

Thank you!
Hi Leanna- I'm not sure how much Erin filled you in so in short I'll say a team of women and I are working to put forth an application to SUNY Charter Schools Institute in hopes of bringing a tuition free Montessori micro-school to Ballston Spa. Part of our application requires us to determine roughly 3-4 possible locations (nothing set in stone) to determine an 'average' cost per sq foot per year in our area. We are really hoping to be directly in Ballston Spa. We are not 100% opposed to Milton or Malta. We just prefer Ballston Spa.

Info so far that may help:

- In a class of roughly 25 students requiring 60 sq feet of indoor space, in total we would need a space that is at least 1,500 sq feet. I need to determine three possible locations in Ballston Spa preferably so we can find the cost per sq foot per year on average in the area.
- Unfortunately- one such space is Malta which I really don't want to do b/c they already have a Montessori program in Malta and I'm not trying to be competitive with established Montessori programs. Here is the malta location [redacted]
- Also- here is a dream location in Ball [redacted]

The goal is to determine the average cost per sq foot in our area. Any way you can assist? We would greatly appreciate this!
Courtney

Leanna Pace
to me, Erin

Mar 20, 2025, 10:18 AM (12 days ago)

Hey Courtney!
Thank you both so much for getting me up to speed on this exciting project! I would love to help out. The average price per square foot in Ballston Spa can be anywhere from $20-$40/sqft, of course this depends on condition, location, size etc. Off the top of my head, for 1500 sqft in "turn key" condition you'll likely be around $27-$28/sqft. I'll run through a few different options both on and off market and can send them your way if that would be helpful!

[redacted]

Courtney Soucy [redacted]
to Leanna, Erin

Mar 20, 2025, 5:13 PM (12 days ago)

To clarify: these prices are per sq foot per year? Our finance connect is creating our budget and needed to know if it's per month or per year?
Courtney Murphy

[redacted]

Leanna Pace
to me

Mar 20, 2025, 6:07 PM (12 days ago)

That would be for the year!

[redacted]

Courtney Soucy [redacted]
to Erin, Leanna

Mar 27, 2025, 5:58 PM (5 days ago)

Hi there,
Wanted to check in to determine if you know of any spaces at minimum for year 1- 1,000-1,500 sq feet and in future years larger closer to 3,000+? Just need some rough ideas to provide in our application to show there are prospective available spots.
This included spots that ARENT zoned for school- as Bspa is rezoning and it won't be totally rezoned by the time of application so- any prospective places preferably in Ballston Spa? Thanks for any help!
Courtney Murphy
[redacted]

On Mar 19, 2025, at 9:20 PM, Courtney Soucy [redacted]

•••

Leanna Pace
to me, Erin

Mar 27, 2025, 6:17 PM (5 days ago)

Hey Courtney!

Your ears must have been ringing. Sorry for the delay here. I put some feelers out for any potential properties off market in Ballston Spa aside from [redacted] The majority on market right now is plaza space greater than 4000 sqft. I widened the search to Saratoga County and have come up with the below list thus far.

[redacted]

I have been in communication with a client of mine that may be listing a place for [redacted] cannot disclose the address at this time but the ppsqft will likely be around $18-20.

[redacted]

I wanted to stick with properties as close to your zoning as possible (office, retail, fitness, flex spaces etc. instead of light industrial/auto-body)

Hopefully this is helpful and as soon as I am able to disclose the location on the property in Ballston Spa, I can share it.

There are options for sale as well that I would be happy to put together a list for if you'd be interested in taking a look or need the data.

Leanna Pace | Pace Property Team Commercial & Residential Sales
[redacted]

•••

Courtney Soucy [redacted]
to Leanna, Erin

Mar 27, 2025, 6:56 PM (5 days ago)

Thank you so much! It's so helpful to see! While we aim to stay in Ballston Spa it is helpful to see what's out there.
Do you know if the bspa well now was actually ever a well now?
Courtney Murphy
[redacted]

On Mar 27, 2025, at 6:17 PM, Leanna Pace [redacted] wrote:

•••

Leanna Pace Mar 27, 2025, 7:10 PM (5 days ago)
to me, Erin

Of course!

It was supposed to be but something happened (I'm not exactly sure) and they never took occupancy.

Leanna Pace | Pace Property Team Commercial & Residential Sales

[redacted]

Courtney Soucy [redacted] Mar 27, 2025, 8:43 PM (5 days ago)
to Leanna, Erin

Thanks! This is all very helpful and we'll keep in touch. We are not slated to open until Fall 2026, and would be looking for facilities before then obviously but for now just putting forth an application with some of these in mind.
Courtney

Leanna Pace Mar 27, 2025, 8:53 PM (5 days ago)
to me, Erin

Sounds good! Let me know how it goes and how I can help as you progress!

Fingers crossed!!

Leanna Pace | Pace Property Team Commercial & Residential Sales

[redacted]

R-17 - Food Services

WUNYCS is committed to ensuring that all students have access to nutritious meals that support their overall well-being and academic success. Our enrollment of students who may be economically disadvantaged is predicted to be in line with the district average of 36% which actually climbs higher in our title 1 elementary school (49%). We predict many families may benefit from healthy meals being provided throughout the school day. Families will of course also have the option of sending their students with their own meals provided by their families. Our school will participate in the National School Lunch Program (NSLP), a federally assisted meal program that provides nutritionally balanced, low-cost, or free lunches to children in public and nonprofit private schools. Administered by the New York State Education Department's Child Nutrition Program Administration, the NSLP ensures that students receive meals that meet federal nutrition guidelines, emphasizing whole grains, fruits, and vegetables.

All students attending WUNYCS will have access to meals through this program, with eligibility for free or reduced-price meals determined based on federal income guidelines. By participating in the NSLP, WUNYCS will receive state and federal reimbursements for each meal served, allowing the school to provide high-quality food options while maintaining financial sustainability.

Based on our enrollment goals and our commitment to serving a diverse student population, including a significant percentage of economically disadvantaged students (see R-05d - Admissions Policy for use of weighted lottery in this subset of students), WUNYCS anticipates that we may be eligible to participate in the Community Eligibility Provision (CEP). As part of the National School Lunch Program (NSLP), CEP would allow us to provide free breakfast and lunch to all students without requiring individual meal applications, ensuring equitable access to nutritious meals. Given our school's mission to prioritize accessibility and inclusion, we will assess our Identified Student Percentage (ISP) upon enrollment and, if eligible, apply for CEP approval through the New York State Education Department's Child Nutrition Program. This will enable us to streamline meal service, reduce administrative burdens, and create a stigma-free dining experience that supports student well-being and academic success. This aligns with our mission and vision to create a sense of belonging in our schools.

As part of our commitment to fostering a supportive learning environment, Wildflower will ensure that meal services align with our educational values, including independence and practical life skills inspired by Montessori principles. By incorporating the NSLP into our school, we aim to promote healthy eating habits and reduce food insecurity among our students, further reinforcing our dedication to equity, access, and holistic child development.

In Montessori classrooms, Practical Life activities are essential for developing independence, coordination, concentration, and a sense of responsibility. Food preparation is a fundamental part of Practical Life that allows children to engage in real-world tasks while developing fine motor skills, sequencing abilities, and self-confidence. As such, we will promote community and blur the lines between home and school by asking families to voluntarily

provide snacks for our classroom if they are willing and able to. These snacks will be provided to students during a designated snack time so that students may participate in food preparation. We will have a voluntary sign up for proposed snack foods provided to families and they may choose whether or not they are willing and able to provide these snacks. We will also allocate a portion of our budget to this to allow students the practical life activities around food preparation in our classrooms.

Key Aspects of Montessori Food Preparation

1. Hands-On Learning & Independence
    - Children participate in age-appropriate food prep tasks, such as peeling, slicing, juicing, spreading, and pouring.
    - Tools are child-sized and designed for safe, independent use (e.g., small peelers, butter knives, manual juicers).

2. Development of Fine & Gross Motor Skills
    - Activities like cutting bananas, spreading jam, or peeling carrots strengthen hand muscles and refine hand-eye coordination.
    - Pouring water or measuring ingredients helps children practice control and precision.

3. Grace & Courtesy in Mealtime
    - Children learn table setting, serving food to others, and using polite phrases like “Would you like some?” and “Thank you.”
    - They gain an appreciation for community and social interaction during shared meals.

4. Sensory Exploration & Real-Life Applications
    - Food prep allows children to touch, smell, and taste ingredients, deepening their sensory experiences.
    - Following step-by-step instructions builds sequencing and problem-solving skills.

5. Healthy Eating & Cultural Awareness
    - Montessori food prep often includes whole, nutritious foods, teaching children about healthy choices.
    - Activities incorporate global recipes, fostering an appreciation for different cultures and traditions.

Examples of Montessori Food Preparation Activities

- Peeling & Slicing: Bananas, cucumbers, eggs
- Spreading: Butter on crackers, hummus on bread
- Pouring & Measuring: Water, rice, flour for baking
- Juicing & Chopping: Squeezing oranges, cutting soft fruits
- Baking & Cooking (with supervision): Mixing dough, assembling simple snacks

The Impact of Food Preparation in Montessori

Through food preparation, children develop confidence, patience, and a sense of contribution to their classroom community. These activities bridge the gap between home and school, reinforcing essential life skills that children carry into adulthood. Montessori food preparation isn't just about making snacks, it's about building independence, self-care skills, and a lifelong appreciation for food and community.

Nutritious school meals are essential to students' academic success, health, and well-being. For many, they provide the most reliable source of balanced nutrition, helping improve focus, energy, and behavior. By providing school meals, we can address the possibility of food insecurity. School meal programs ensure all students have the nourishment they need to learn and thrive.

R-18 - Health Services

Wildflower Upstate New York is committed to providing comprehensive health services in compliance with New York State Education Law Article 19 and Public Health Law to ensure the well-being of all students. The school will contract with a licensed school nurse (RN) through a licensed healthcare provider or arrange for a district-provided school nurse through an agreement with Ballston Spa Central School District largely on an as needed basis. They will be responsible for assessing ill students if needed, maintaining health records, and conducting required health screenings, including vision, hearing, and scoliosis evaluations at the appropriate grade levels. Additionally, the school will explore partnerships with community health organizations to provide students with additional screenings and healthcare services as needed. Additionally, all staff members (Teacher Leaders, Teachers Assistants, Executive Director, and substitute teachers) will be trained in basic first aid, CPR, and AED use annually.

Medical Space and Equipment

Wildflower Upstate New York will establish a designated medical area within the school that meets NYSED health service requirements (as mentioned in the Facility section of this RFP). This space will be private, accessible, and properly equipped to handle routine health needs, emergencies, and medication administration. It will include a cot, first aid supplies, an Automated External Defibrillator (AED), and secure storage for medications and health records.

Collection and Storage of Medical and Immunization Records

During enrollment periods, Teacher Leaders and later a contracted school nurse will oversee the collection, review, and secure storage of all medical and immunization records, ensuring compliance with New York State Public Health Law Section 2164. All incoming students will be required to submit up-to-date immunization records and a current physical examination report within 30 days of enrollment. If a student does not provide the necessary records, the school will refer the student for a health appraisal by licensed personnel, as mandated by Education Law Section 904.

Student health records will be stored in a HIPAA-compliant electronic database, ensuring confidentiality, accessibility for authorized personnel, and compliance with FERPA regulations. The school nurse will conduct routine immunization record checks and communicate with families about any required updates.

Administration of Medication and Emergency Procedures

The school will follow state and federal laws regarding the administration of medication. The school nurse will be responsible for:

- Administering any daily and emergency medications to students as prescribed by a physician.
- Maintaining a secure, locked storage unit for all medications.

- Ensuring all medications are properly labeled and accompanied by the required parental and medical authorization forms.

As part of our inclusive model, Wildflower Upstate New York recognizes the importance of accommodating students with disabilities or medical conditions that require specialized care. If necessary, the school will ensure that Registered Nurses (RNs) or other qualified medical professionals are available to support students with Individualized Education Programs (IEPs) or 504 Plans requiring medical services during the school day. By implementing these health service policies and procedures, Wildflower Upstate New York will provide a safe and supportive environment where students can thrive academically and physically, ensuring that all health needs are met in full compliance with state regulations.

R-19 - Transportation

WUNYCS will collaborate with Ballston Spa Central School District (BSCSD) to ensure eligible students receive transportation services in accordance with New York State law. As a public charter school, we recognize that transportation access is essential for families and will work closely with the district to coordinate safe and efficient student transportation.

The Ballston Spa Central School District (BSCSD) provides transportation services to eligible students based on distance from their assigned schools. For elementary students in grades K-8, transportation is available if they live 0.7 miles or more from their designated school. The district measures these distances using the most direct public walking route. Students residing within these boundaries qualify for daily transportation services, ensuring safe and reliable access to education.

In addition to district schools, BSCSD extends transportation services to students attending non-public schools within 15 miles of their residence. In the past, participating non-public schools have included Waldorf, Augustine Classical, Saratoga Independent, Saratoga Central Catholic, Malta Montessori, St. Clement's, and St. Mary's. As we will be a public charter in the district, we will partner with BSCSD to fully outline transportation requirements as it aligns to a public charter with appropriate mileage for families qualifications. Families seeking transportation will need to submit a formal request to BSCSD by April 1st of the preceding school year, likely following the same process used for students attending non-public schools. The district will oversee bus routing and scheduling, ensuring charter school students are integrated into their existing transportation framework when possible.

For students with disabilities, WUNYCS will ensure that transportation accommodations are fully aligned with each child's Individualized Education Program (IEP). If an IEP specifies specialized transportation services, BSCSD will be responsible for providing appropriate arrangements, which may include door-to-door transportation, wheelchair-accessible vehicles, or transportation aides as required. We will work closely with district officials to ensure students receive the services mandated by their IEPs.

Additionally, we recognize that some families may reside beyond the district's 15-mile transportation boundary or may not qualify for district-provided busing. In these cases, WUNYCS will partner with the student's home district in securing transportation for the student. Given the nature of our community's interest and demand thus far, we believe our enrollment will likely fill with students directly in our district. By maintaining open communication with BSCSD's transportation department, WUNYCS will ensure that all students, including those with disabilities, have equitable access to safe and reliable transportation, minimizing any barriers to attendance and participation in our program.

R-20 - Insurance

WUNYCS is committed to securing comprehensive insurance coverage to protect our students, staff, and assets. While we do not yet have a confirmed insurance provider, we are actively considering reputable carriers in the Capital region. Securing comprehensive insurance coverage is essential so that we may protect our students, staff, and assets. For further specific set aside amounts see R-21e - Budget Template. In Upstate New York, several insurance providers specialize in serving educational institutions, including charter schools. Here are some notable options we will consider if approved for our application:

1. **Utica National Insurance Group**
    - **Overview:** Since 1974, Utica National has offered specialized coverages for educational institutions. They currently insure over a thousand public, private, charter, Montessori, junior/community colleges, and small colleges throughout the United States.

2. **New York Schools Insurance Reciprocal (NYSIR)**
    - **Overview:** NYSIR is a not-for-profit insurance company owned by its member school districts and BOCES in New York State. They provide property and casualty insurance tailored specifically for K-12 schools and BOCES across the state.

3. **Wright Specialty Insurance**
    - **Overview:** Wright Specialty offers a comprehensive suite of property and casualty insurance coverages and services for educational institutions, including charter schools. Their Education Insurance Program is designed to help manage the unique risks associated with schools.

4. **Charter School Insurance Alliance (CSIA)**
    - **Overview:** CSIA provides exclusive insurance solutions tailored specifically for charter schools. Their program aims to simplify the insurance process, offering the right coverage at competitive rates by comparing policies from top providers.

5. **EPIC Insurance Brokers & Consultants**
    - **Overview:** EPIC offers specialized insurance products to help protect charter schools' students, employees, property, and vehicles. They provide comprehensive consulting and coverage, allowing schools to focus on education while ensuring adequate protection against various risks.

Once the charter is approved, we will finalize our selection to ensure that all necessary policies are in place before opening in Fall of 2026. At this time, we have estimated coverage needs based on industry standards and similar charter school policies. We anticipate securing general liability insurance to protect against bodily injury or property damage claims, property insurance to cover losses from fire, theft, and natural disasters, and educators' legal liability insurance to address claims related to errors and omissions in educational duties. Additionally,

we plan to obtain employment practices liability insurance, umbrella liability coverage, and workers' compensation insurance to ensure full compliance with legal requirements and best practices. WUNYCS does not intend to own or lease school vehicles, therefore, we will not seek coverage in this area. We will work diligently to secure the most cost-effective and comprehensive coverage, ensuring that WUNYCS meets all regulatory requirements and operates with financial and operational security from day one.

R-21ad - Fiscal Soundness

a. Budget Narrative

WUNYCS has designed a fiscally responsible and sustainable financial model to support its academic program and long-term operations. The budget plan includes a startup budget, a first-year operational budget with cash flow projections, and a five-year budget plan, all structured to ensure financial stability and alignment with the school's mission.

Startup Budget and Funding Sources

During the startup phase, WUNYCS anticipates securing $200,000 through the Charter Schools Program (CSP) grant, which will be used to cover essential pre-opening expenses. These funds will support key startup costs, including salary of the executive director, consultant support for our school start up, Montessori classroom materials, administrative Teacher Leader materials, Professional Development for staff, and possible renovations within a facility. However, while we have included potential CSP funding in our financial planning as a possible revenue source, we recognize the importance of preparing for alternative funding scenarios. Our budget remains fiscally sound, with multiple revenue streams identified, including state per-pupil funding, potential grants, and private fundraising efforts. We have also factored in conservative financial projections and contingency plans to ensure the successful launch and sustainability of our school, regardless of CSP approval. Upon approval of our charter, we will initiate strategic fundraising efforts to support our long-term financial sustainability and uphold our commitment to fiscal responsibility.

First-Year Operational Budget and Cash Flow

In the first operational year, the school will primarily rely on BSCSD per-pupil revenue projected at $ 14,259 per student, totaling $228,144 based on an initial enrollment of 16 students. Additional funding sources include federal Title I allocations, special education funding, and potential participation in the Community Eligibility Provision (CEP) for meal services. To ensure positive cash flow, the budget incorporates prudent fiscal controls, including maintaining at least 3 months of operating reserves by the end of year 2 and setting aside $75,000 for an escrow account dedicated to dissolution expenses, as required by NYSED. We also recognize the timing challenges associated with per-pupil revenue disbursements and have accounted for delayed state funding disbursements by maintaining an initial cash reserve to cover the first few months of operations.

Five-Year Budget Plan and Long-Term Sustainability

The five-year budget reflects gradual enrollment growth, increasing from 16 students in Year 1 to 59 students in Year 5. Revenue projections are based on conservative per-pupil state funding estimates, with additional revenue sources, including private grants, supporting the expansion of staffing and facilities. Over time, expenses currently covered by soft money, such as startup facility costs and teacher training, will transition to sustainable revenue streams from

state and federal allocations.

WUNYCS is committed to cost-efficient operations, with staff salaries aligned to local scales, competitive benefits, and a lean administrative structure. The facility lease budget anticipates securing sufficient square footage and we have set aside $18, 400 for the year to ensure compliance with NYSED and ADA requirements while maintaining affordability within the local area. This encompasses a space we may grow into over time.

Backstop Strategies and Financial Safeguards

Given economic uncertainties and potential enrollment fluctuations, we have incorporated multiple contingency plans:

- Alternative Revenue Streams: WUNYCS will actively pursue grant funding and explore opportunities for local partnerships to supplement state per-pupil funding. We will fundraise in year zero to off-set costs.
- Conservative Budgeting: Revenue estimates are based on lower-end per-pupil projections, ensuring financial viability even with minor enrollment shortfalls.
- Expense Adjustments: In the event of lower-than-anticipated funding, we have identified non-essential costs that could be temporarily reduced without impacting instructional quality, such as less budgeting towards field trips and technology which are nice to have yet not pertinent to our programming.
- Facility Flexibility: Our facility search includes scalable options, allowing us to grow into space rather than overcommitting to a lease in the early years.

By maintaining diverse revenue sources, conservative financial planning, and robust fiscal oversight, WUNYCS ensures a sound financial foundation that will support the Montessori academic model and provide a high-quality educational experience for students in the community.

Staffing Plan & Growth

WUNYCS is committed to offering competitive salaries and benefits to attract and retain high-quality educators. Teacher Leaders as well as teachers assistants will receive compensation aligned with regional/local salary offerings, with contracted Teacher Leaders supporting the school during the pre-opening phase. Teacher Leader salaries are estimated at $60,000, and Teachers assistants at $41,600. These salary assumptions align with Wildflower's Montessori model and ensure staff are fairly compensated.

As the school expands, staffing will scale accordingly to support student learning. In Year 1, WUNYCS will begin with one teacher leader and a teacher's assistant in a primary classroom (kindergarten and 1st grade aged students, and if our charter is approved we would secure a second 501c3 in order to operate a pre-k aged 3,4 enrollment of students as well). Each year we will grow at a fiscally sustainable pace. Staffing will expand proportionally, ensuring a low

teacher-to-student ratio and personalized learning experiences.

By full implementation, the school will include:

- 2 Primary Teacher Leaders (Kindergarten)
- 2 Lower Elementary Teacher Leaders (Grades 1-3)
- 2 Upper Elementary Teacher Leaders (Grades 4-6)
- 6 Teachers Assistants (one per Montessori classroom (gradeband))

While the initial budget reflects one lead teacher and one teaching assistant per classroom, WUNYCS will consider transitioning to a co-teaching model with two certified teachers per classroom as enrollment increases and financial capacity allows. This shift would enhance our ability to deliver differentiated instruction and support our inclusive education model. Should such a transition occur, the school will document the rationale, outline how the change aligns with our mission and benefits student learning, and maintain transparency with the SUNY Charter Schools Institute through regular reporting and any required notifications. Additionally, while our initial enrollment plan outlines a phased growth model, we recognize the possibility of accelerated demand from the community in regards to age groups added and in which years. Should enrollment interest exceed projections, and with SUNY's approval and/or with the proposal of a charter revision, we would consider expanding to serve the next age group sooner than originally planned to meet the needs of our students and families. We will remain in open communication with SUNY CSI as we continue our year 0 planning year and determine community needs and any potential material changes.

Academic Program Investment

To support high-quality instruction, WUNYCS has allocated funding for curriculum materials, textbooks, Montessori materials, and technology, ensuring alignment with the school's academic vision. The budget includes:

- Professional development funding for teacher certification, AMI Montessori training, and ongoing workshops
- Travel allowances for site visits and peer learning exchanges
- Standardized assessment implementation beginning in Year 2 (when we enroll third grade aged students, who partake in NYS assessments), including NWEA MAP and NYS assessments
- A dedicated technology budget, providing one computer per teacher leader

Operational & Financial Sustainability

To maintain operational viability, WUNYCS will contract essential services such as legal, accounting, food service, and janitorial needs while maintaining cost efficiency. The school will also secure liability and directors' insurance, fund staff and student recruitment, and allocate resources for facility leases, utilities, and potential renovations. Cost estimates have been

carefully developed through vendor research and market analysis.

To ensure long-term financial health, the school will maintain a balanced budget and set aside $75,000 in an escrow account in the event it's needed due to dissolution. This prudent planning ensures financial flexibility in case of revenue fluctuations, unexpected expenses, or operational changes while supporting the school's mission to provide a high-quality, sustainable Montessori education.

b. Financial Planning

The annual budget development process at WUNYCS will be a collaborative effort involving Teacher Leaders, the Board of Trustees, the Finance Committee, and a contracted financial service provider. This structured process ensures that financial planning aligns with the school's mission, growth projections, and operational needs, while maintaining fiscal responsibility and compliance with regulatory requirements.

Who Will Be Involved

The budgeting process will be led by the Teacher Leaders of each site, in collaboration with the financial services provider, the Treasurer, and the Finance Committee of the Board of Trustees. The Finance Committee will oversee financial planning, provide expert insights, and ensure that proposed budgets are realistic, mission-driven, and sustainable. The full Board of Trustees will provide oversight, review the final budget, and approve it prior to submission to SUNY. The executive director will act as a liaison between the board and the teacher leaders.

How Needs Will Be Identified and Weighed

Budgetary needs will be assessed based on:

- Projected enrollment growth and staffing requirements to maintain appropriate teacher-to-student ratios.
- Academic program needs, including Montessori materials, curriculum resources, and student support services.
- Operational costs, such as lease agreements, utilities, insurance, and contracted services.
- Student support services, including special education accommodations, intervention programs, and professional development for staff.
- Compliance with state and federal regulations, including Title funding, per-pupil allocations, and special education funding.

To ensure a balanced budget, the Finance Committee and Teacher Leaders will analyze year-to-date actuals, assess funding opportunities, and prioritize spending based on the school's

mission, student outcomes, and operational sustainability.

Timeline for Creating and Approving Budgets

The budget planning cycle will follow a structured timeline to ensure thorough preparation and approval:

- January – March: The first draft of the budget will be developed, incorporating updates to key assumptions such as enrollment projections, regulatory changes, and strategic priorities.
- March: The Treasurer will review the initial budget draft with the Teacher Leaders and financial provider.
- April: The Finance Committee will review the second draft, making necessary refinements.
- May – June: The full Board of Trustees will vote on the final budget, incorporating any additional feedback from strategic planning discussions.
- June: The final approved budget will be submitted to SUNY as required per the Model Charter Agreement, ahead of the July 1st deadline for SUNY.

Procedures for Monitoring and Modifying Budgets

To ensure ongoing financial health, the budget will be monitored regularly:

- Monthly financial reviews: The back-office financial service provider will close the books and generate financial statements, including updated cash balances, budget vs. actual performance, and variance reports.
- Finance Committee oversight: The Committee will review financial statements and engage with Teacher Leaders and the back-office provider to assess spending trends and identify areas of concern.
- Board of Trustees reporting: The Finance Committee will present monthly financial updates to the full Board, ensuring transparency and accountability.
- Annual budget adjustments: If significant variances occur (e.g., lower-than-expected enrollment, policy changes affecting funding, or unexpected expenses), the budget may be updated and re-approved by the Board to reflect new financial realities.

By proactively monitoring financial performance and adapting to changing conditions, WUNYCS will maintain fiscal responsibility while supporting a high-quality, student-centered learning environment.

c. Fiscal Audits

WUNYCS will engage a New York State–approved audit firm with extensive experience in charter school finance to conduct an annual independent financial audit. The audit will be carried out by a certified public accountant (CPA) or a certified public accounting firm licensed in New York State.

The Finance Committee of the Board of Trustees will oversee the audit firm selection process by issuing requests for proposals (RFPs) and selecting a firm that will report directly to the Board. This process ensures transparency, accountability, and alignment with best governance practices. The audit will comply with all applicable federal, state, and local auditing standards, including those set forth by the SUNY Charter Schools Institute.

The selected audit firm will also support required financial reporting, including the Charter Schools Program (CSP) agreed-upon procedures report, the A-133 Single Audit (if applicable), and the school's annual IRS Form 990 filing—ensuring full compliance with all regulatory and fiscal oversight requirements.

WUNYCS will ensure that its audits include detailed financial statements, such as income and expenditure reports and balance sheets, for each school or site—whether operational, in startup, or with delayed opening. Audits will also cover central or regional back-office functions and provide consolidated statements for the organization as a whole. These audit procedures reflect Wildflower's commitment to fiscal responsibility, regulatory compliance, and strong financial stewardship, consistent with SUNY's expectations for public charter schools.

d. Dissolution Procedures

In the event of dissolution, the Board of Trustees of WUNYCS will be responsible for overseeing the process in accordance with Education Law §2851(2)(t). In the immediate next steps, this would include notifying parents and guardians of enrolled students and ensuring that an enrollment roster is submitted to the New York State Department of Education (NYSED). Additionally, all student records will be transferred to NYSED or another appropriate entity to ensure continuity of education. We will utilize SUNY's closure plan template in order to take necessary procedures in the event of closure and dissolution.

Following the resolution of outstanding debts and liabilities, any remaining unrestricted assets will be allocated in accordance with Education Law §220, either to another charter school within the district or directly to NYSED. To prepare for this possibility, WUNYCS will set aside, as previously stated, $75,000, which will be held in a dedicated escrow account. These funds will be used exclusively for legal and audit expenses related to dissolution, as well as for settling any remaining financial obligations.

A detailed overview of the Institute's closure plan timeline is provided here as reference:

Governance, Financial Planning & Instructional Continuity

Upon final action by the SUNY Trustees, the WUNYCS Board will establish a Closure Committee to oversee the dissolution process. A financial assessment will be conducted immediately to confirm that sufficient funds exist to continue operations through the end of the current school year. If payroll obligations cannot be met, the Institute will be notified immediately as required by New York State law. As mentioned previously, the school will reserve at least $75,000 in escrow (or as directed by the Institute) to cover wind-up costs. Summer programming will be canceled, and communication will be sent to families and staff accordingly. Directors and Officers (D&O) liability insurance, if applicable, will be maintained through the final dissolution process.

Notification to Stakeholders & Contract Management

The WUNYCS will issue timely notifications to parents, guardians, school districts, funding partners, unions, contractors, and commercial lenders regarding school closure and the timeline of wind-down activities. These communications will include final instruction dates, reassignment expectations for students, and the status of staff contracts and benefits. Within 45 days of final charter action, contractors and service providers will be formally notified of terminations. Union representatives will receive appropriate notices in compliance with CBAs and labor law, and all benefit providers (e.g., healthcare, retirement) will be informed of termination dates and coverage extensions.

Student Records, Testing, and Employee Offboarding

Within 7 days after the end of classes (EOC), final report cards will be issued and parents/guardians will be informed of student record transfers. Within 14 days post-EOC, all required student records and testing materials will be transferred to the school district of location. Employee termination notices will be issued at least 60 days prior to EOC, and NYS unemployment and retirement systems will be notified. Benefits will be terminated according to applicable regulations. Equipment and contracted materials will be returned or removed as needed, and the Institute will be provided with supporting documentation for all related activities.

Financial Statements & IRS Compliance

An interim financial report will be prepared and submitted to the Institute within 10 days after EOC, detailing outstanding debts, collected receivables, and asset status. Updates will be submitted every 30 days until a final statement is filed—anticipated within 90 days after EOC. This final audited report will outline all liabilities, assets, and efforts made to reconcile financial obligations, and it will serve as part of the formal dissolution petition to the NYS Supreme Court. The WUNYCS will also continue fulfilling its obligations under IRS 501(c)(3) regulations and file all required tax documents and address changes.

Grants, Charter Reports & Record Retention

All state and federal grants will be closed out, including notifications, final expenditure reports, and asset disposition in alignment with NYSED and federal requirements (e.g., 34 CFR Part 80). U.S. Department of Education Forms 269/269a will be filed if applicable. Throughout the wind-down, all required charter and legal reports (such as resignations or final annual reports) will be submitted. The WUNYCS will maintain permanent records related to governance, contracts, grants, audits, assets, benefits, and personnel. Upon dissolution, any remaining records will be transferred to NYSED or as directed by the court.

Creditor/Debtor Reconciliation and Notifications

Within 30 days of final charter action, a list of all creditors and debtors will be created, UCC searches performed, and notifications issued to secure a final accounting. Final settlements will be negotiated, and unresolved debt collections may be turned over to commercial agencies. Creditors will be reconciled, and school districts will be updated regarding special education and per-pupil payments. Debtors will be contacted to satisfy outstanding balances. All documentation of disputes or reconciliations will be retained and submitted to the Institute.

Final Distribution of Assets & Legal Dissolution

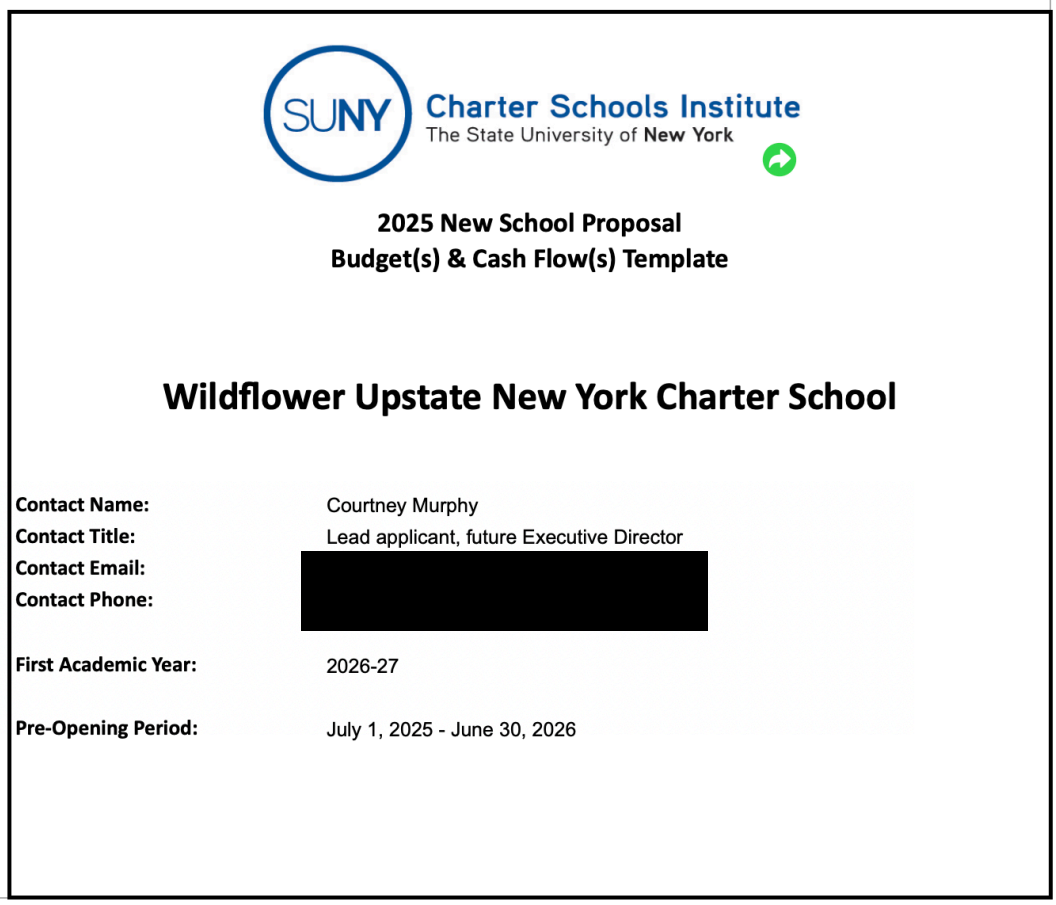
Final asset distribution will be guided by the NYS Supreme Court during dissolution proceedings. All debts will be settled or provisioned, and remaining assets transferred to charter or district schools per legal interpretation. An itemized receipt will be retained for each asset transfer. The Board must adopt a resolution of dissolution and file it with the NYS Supreme Court within 3–6 months of charter expiration. The petition must include asset inventories, notices to the Attorney General and Board of Regents, and publication requirements. Upon court order, all permanent records will be sent to NYSED. Trustees will remain in office through the wind-up process and support the final dissolution of the WUNYCS .

These are the necessary steps and timeline that WUNYCS will follow in the event of closure, adhering strictly to the SUNY Charter Schools Institute's Closure Plan template requirements and all applicable laws and regulations.

Fiscal Soundness Conclusion

We are committed to maintaining fiscal soundness through disciplined, transparent, and prudent budgeting practices. Our financial planning will be grounded in conservative revenue projections, careful monitoring of expenditures, and ongoing evaluation of resource allocation to ensure alignment with student needs and academic priorities. Regular financial reviews, board oversight, and compliance with SUNY CSI’s reporting requirements will guide our efforts to remain financially responsible and responsive to both current operations and long-term sustainability.

R-21e - Budget Template



SUNY Charter Schools Institute
The State University of New York

2025 New School Proposal
Budget(s) & Cash Flow(s) Template

Wildflower Upstate New York Charter School

Contact Name:	Courtney Murphy
Contact Title:	Lead applicant, future Executive Director
Contact Email:	[redacted]
Contact Phone:	
First Academic Year:	2026-27
Pre-Opening Period:	July 1, 2025 - June 30, 2026

PLEASE ENTER SCHOOL NAME ON TAB - "1) SCHOOL INFORMATION"
2026-27 through 2030-31

CHARTER ENROLLMENT BY GRADE							
GRADES	**LEVEL**	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**	**AGE RANGE**
Kindergarten	Elementary School	8	8	8	8	16	5-6
1st Grade	Elementary School	8	8	8	8	8	6-7
2nd Grade	Elementary School		8	8	8	8	7-8
3rd Grade	Elementary School			8	8	8	8-9
4th Grade	Elementary School				8	8	9-10
5th Grade	*Elementary School*				3	8	10-11
6th Grade	Middle School					3	11-12
7th Grade	Middle School						
8th Grade	Middle School						
9th Grade	High School						
10th Grade	High School						
11th Grade	High School						
12th Grade	High School						
Ungraded							
TOTAL		16	24	32	43	59	

NUMBER OF CLASSES BY GRADE						
GRADES	**LEVEL**	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**
Kindergarten	Elementary School	1	1	1	1	2
1st Grade	Elementary School	1	1	1	1	1
2nd Grade	Elementary School		1	1	1	1
3rd Grade	Elementary School			1	1	1
4th Grade	Elementary School				1	1
5th Grade	Elementary School				1	1
6th Grade	Middle School					1
7th Grade	Middle School					
8th Grade	Middle School					
9th Grade	High School					
10th Grade	High School					
11th Grade	High School					
12th Grade	High School					
Ungraded						
TOTAL		2	3	4	6	8

AVERAGE NUMBER OF STUDENTS PER CLASS BY GRADE						
GRADES	**LEVEL**	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**
Kindergarten	Elementary School	8	8	8	8	8
1st Grade	Elementary School	8	8	8	8	8
2nd Grade	Elementary School	0	8	8	8	8
3rd Grade	Elementary School	0	0	8	8	8
4th Grade	Elementary School	0	0	0	8	8
5th Grade	Elementary School	0	0	0	3	8
6th Grade	Middle School	0	0	0	0	3
7th Grade	Middle School	0	0	0	0	0
8th Grade	Middle School	0	0	0	0	0
9th Grade	High School	0	0	0	0	0
10th Grade	High School	0	0	0	0	0
11th Grade	High School	0	0	0	0	0
12th Grade	High School	0	0	0	0	0
Ungraded		0	0	0	0	0

SUMMARY AND OTHER INFORMATION					
Total Elementary Enrollment	⚠	⚠	⚠	⚠	⚠
Total Middle School Enrollment	-	-	-	-	3
Total High School Enrollment	-	-	-	-	-
Total Ungraded Enrollment	-	-	-	-	-
Total Enrollment	⚠	⚠	⚠	⚠	⚠
Change in Net Enrollment from Prior Year (Count)	⚠	⚠	⚠	⚠	⚠
Change in Net Enrollment from Prior Year (Percent)	0.0%	0.0%	0.0%	0.0%	0.0%
Anticipated rate of attrition (Percent)	0.0%	0.0%	0.0%	0.0%	0.0%

ADDITIONAL NOTES/COMMENTS
Given that Montessori grade bands encompass mixed-age groupings over three-year spans (e.g., Primary: ages 3–5; Lower Elementary: grades 1–3; Upper Elementary: grades 4–6), the concept of an "average number of students per class per grade" does not directly apply to our educational model. Instead, we structure classrooms to support a maximum of 24 students per cohort. For example, a Primary classroom would consist of up to 24 students across the three age levels combined.

ESTIMATED ENROLLMENT BY DISTRICT					
ANNUAL ENROLLMENT BY DISTRICT TOTALS	16	24	32	43	59
Enrollment by Grade vs Enrollment by District (should = 0)	⚠	⚠	⚠	⚠	⚠

ENTER NUMBER OF SCHOOL DISTRICTS ANTICIPATED: -->	**1**

PRIMARY SENDING SCHOOL DISTRICT	Ballston Spa Central School District	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**
DISTRICT'S ANNUAL TOTAL OPERATING BUDGET		$ 107,179,996	$ 107,179,996	$ 107,179,996	$ 107,179,996	$ 107,179,996
ENROLLMENT (*Charter School*)		16	24	32	43	59
DESCRIPTION OF SOURCE FOR DISTRICT'S OPERATING BUDGET (Include web address if available)		This is the 2024-2025 budget, which is all that's been approved. https://www.bscsd.org/about/financial-information#:~:text=The%20Board%20of%20Education%20approved,the%202023%2D2024%20tax%20levy.				

SECONDARY SENDING SCHOOL DISTRICT	*Select from drop-down list →*	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**
DISTRICT'S ANNUAL TOTAL OPERATING BUDGET		$ -	$ -	$ -	$ -	$ -
ENROLLMENT (*Charter School*)						
DESCRIPTION OF SOURCE FOR DISTRICT'S OPERATING BUDGET (Include web address if available)						

PRIMARY/OTHER	**DISTRICT NAME(S)**	**2026-27**	**2027-28**	**2028-29**	**2029-30**	**2030-31**
Other District 3	Select from drop-down list →					
Other District 4	Select from drop-down list →					
Other District 5	Select from drop-down list →					
Other District 6	Select from drop-down list →					
Other District 7	Select from drop-down list →					

STAFFING PLAN FTE		Year 1	Year 2	Year 3	Year 4	Year 5
	Acad Years	2026-27	2027-28	2028-29	2029-30	2030-31
	Grades	K-1	K-2	K-3	K-5	K-6
	Enrollment	16	24	32	43	59

***NOTE:** Enter the number of planned full-time equivalent ("FTE") positions in each category for each charter year in the section provided below.*

***NOTE:** State the assumptions that are being made for personnel FTE levels in the section provided below.*

ADMINISTRATIVE PERSONNEL FTE	FTE					Description of Assumptions
Executive Management	1.0	1.0	1.0	1.0	1.0	Executive Director
Instructional Management	0.0	0.0	0.0	0.0	0.0	
Deans, Directors & Coordinators	0.0	0.0	0.0	0.0	0.0	
CFO / Director of Finance	0.0	0.0	0.0	0.0	0.0	
Operation / Business Manager	0.0	0.0	0.0	0.0	0.0	
Administrative Staff	0.0	0.0	0.0	0.0	0.0	
TOTAL ADMINISTRATIVE STAFF	1.0	1.0	1.0	1.0	1.0	
INSTRUCTIONAL PERSONNEL FTE						
Teachers - Regular	1.0	2.0	2.0	3.0	4.0	1 Teacher Leader in each setting (primary, lower, upper, second primary site)
Teachers - SPED	0.0	0.0	0.0	0.0	0.0	
Substitute Teachers	0.0	0.0	0.0	0.0	0.0	
Teaching Assistants	1.0	2.0	2.0	3.0	4.0	1 Teacher's Assistant in each setting (primary, lower, upper, second primary site)
Specialty Teachers	0.0	0.0	0.0	0.0	0.0	
Aides	0.0	0.0	0.0	0.0	0.0	
Therapists & Counselors	0.0	0.0	0.0	0.0	0.0	
Other	0.0	0.0	0.0	0.0	0.0	
TOTAL INSTRUCTIONAL	2.0	4.0	4.0	6.0	8.0	
NON-INSTRUCTIONAL PERSONNEL FTE						
Nurse	0.0	0.0	0.0	0.0	0.0	
Librarian	0.0	0.0	0.0	0.0	0.0	
Custodian	0.0	0.0	0.0	0.0	0.0	
Security	0.0	0.0	0.0	0.0	0.0	
Other	0.0	0.0	0.0	0.0	0.0	
TOTAL NON-INSTRUCTIONAL	0.0	0.0	0.0	0.0	0.0	
TOTAL PERSONNEL SERVICE FTE	3.0	5.0	5.0	7.0	9.0	

STAFFING PLAN WAGES		Year 1	Year 2	Year 3	Year 4	Year 5
	Acad Years	2026-27	2027-28	2028-29	2029-30	2030-31
	Grades	K-1	K-2	K-3	K-5	K-6
	Enrollment	16.00	24.00	32.00	43.00	59.00

***NOTE:** Enter the proposed average salary for each category and the anticipated yearly increase percentages in the section provided below.*

***NOTE:** Concisely state the assumptions that are being made for personnel wages in the section provided below.*

ADMINISTRATIVE PERSONNEL WAGES	WAGES						Description of Assumptions
	Salary/Incr %	0.00%	0.00%	0.00%	0.00%	0.00%	
Executive Management	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	Aligns with average salary of a principal/executive director in local districts
Instructional Management	$ - 0	$ -	$ -	$ -	$ -	$ -	
Deans, Directors & Coordinators	$ - 0	$ -	$ -	$ -	$ -	$ -	
CFO / Director of Finance	$ - 0	$ -	$ -	$ -	$ -	$ -	
Operation / Business Manager	$ - 0	$ -	$ -	$ -	$ -	$ -	
Administrative Staff	$ - 0	$ -	$ -	$ -	$ -	$ -	
TOTAL ADMINISTRATIVE STAFF		$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	
INSTRUCTIONAL PERSONNEL WAGES							
Teachers - Regular	$ 60,000	$ 60,000	$ 120,000	$ 120,000	$ 180,000	$ 240,000	Above base pay in Ballston Spa Central Schools ($50,500) to attract staff
Teachers - SPED	$ - 0	$ -	$ -	$ -	$ -	$ -	
Substitute Teachers	$ - 0	$ -	$ -	$ -	$ -	$ -	
Teaching Assistants	$ 41,600	$ 41,600	$ 83,200	$ 83,200	$ 124,800	$ 166,400	Aligns with average salary of a teachers assistant in Ballston Spa Central Schools
Specialty Teachers	$ - 0	$ -	$ -	$ -	$ -	$ -	
Aides	$ - 0	$ -	$ -	$ -	$ -	$ -	
Therapists & Counselors	$ - 0	$ -	$ -	$ -	$ -	$ -	
Other	$ - 0	$ -	$ -	$ -	$ -	$ -	
TOTAL INSTRUCTIONAL		$ 101,600	$ 203,200	$ 203,200	$ 304,800	$ 406,400	
NON-INSTRUCTIONAL PERSONNEL WAGES							
Nurse	$ - 0	$ -	$ -	$ -	$ -	$ -	
Librarian	$ - 0	$ -	$ -	$ -	$ -	$ -	
Custodian	$ - 0	$ -	$ -	$ -	$ -	$ -	
Security	$ - 0	$ -	$ -	$ -	$ -	$ -	
Other	$ - 0	$ -	$ -	$ -	$ -	$ -	
TOTAL NON-INSTRUCTIONAL		$ -	$ -	$ -	$ -	$ -	
TOTAL PERSONNEL SERVICE WAGES		$ 201,600	$ 303,200	$ 303,200	$ 404,800	$ 506,400	

Please enter school name on tab - "1) School Information"		
PROJECTED BUDGET / OPERATING PLAN FOR PRE-OPENING PERIOD		
July 1, 2025 - June 30, 2026		
***NOTE:** Please enter financial data on "6) Pre-OP Cash Flow 1-Year."*		
The pre-opening budget will be for a 1-Year Period as selected on tab #1, School Information.		
		DESCRIPTION OF ASSUMPTIONS
Total Revenue	**200,000**	Wildflower CSP Grant
Total Expenses	**197,100**	
Net Income	**2,900**	
	START-UP PERIOD	
REVENUE		
REVENUES FROM STATE SOURCES		
Grants		
Stimulus	- 0	
DYCD (Department of Youth and Community Developmt.)	- 0	
Other	- 0	
Other	- 0	
TOTAL REVENUE FROM STATE SOURCES	- 0	
REVENUE FROM FEDERAL FUNDING		
Grants		
Charter School Program (CSP) Planning & Implementation	- 0	
Other	200,000	Wildflower CSP Grant
Other	- 0	
TOTAL REVENUE FROM FEDERAL SOURCES	**200,000**	
LOCAL and OTHER REVENUE		
Contributions and Donations	- 0	
Fundraising	- 0	
Erate Reimbursement	- 0	
Earnings on Investments	- 0	
Interest Income	- 0	
Food Service (Income from meals)	- 0	
Text Book	- 0	
OTHER	- 0	
TOTAL REVENUE FROM LOCAL and OTHER SOURCES	**- 0**	
TOTAL REVENUE	**200,000**	
EXPENSES		

EXPENSES	FTE No. of Positions		
ADMINISTRATIVE STAFF PERSONNEL COSTS			
Executive Management	1.00	100,000	Executive Director
Instructional Management	- 0	- 0	
Deans, Directors & Coordinators	- 0	- 0	
CFO / Director of Finance	- 0	- 0	
Operation / Business Manager	- 0	- 0	
Administrative Staff	- 0	- 0	
TOTAL ADMINISTRATIVE STAFF	**1.00**	100,000	
INSTRUCTIONAL PERSONNEL COSTS			
Teachers - Regular	- 0	- 0	
Teachers - SPED	- 0	- 0	
Substitute Teachers	- 0	- 0	
Teaching Assistants	- 0	- 0	
Specialty Teachers	- 0	- 0	
Aides	- 0	- 0	
Therapists & Counselors	- 0	- 0	
Other	- 0	- 0	
TOTAL INSTRUCTIONAL	**- 0**	**- 0**	
NON-INSTRUCTIONAL PERSONNEL COSTS			
Nurse	- 0	- 0	
Librarian	- 0	- 0	
Custodian	- 0	- 0	
Security	- 0	- 0	
Other	- 0	- 0	
TOTAL NON-INSTRUCTIONAL	- 0	**- 0**	
SUBTOTAL PERSONNEL SERVICE COSTS	**1.00**	**100,000**	
PAYROLL TAXES AND BENEFITS			
Payroll Taxes		1,000	
Fringe / Employee Benefits		16,100	
Retirement / Pension		- 0	
TOTAL PAYROLL TAXES AND BENEFITS		**17,100**	
TOTAL PERSONNEL SERVICE COSTS	**1.00**	**117,100**	
CONTRACTED SERVICES			
Accounting / Audit		- 0	
Legal		4,000	
Management Company Fee		- 0	
Nurse Services		- 0	
Food Service / School Lunch		- 0	
Payroll Services		- 0	
Special Ed Services		- 0	
Titlement Services (i.e. Title I)		- 0	
Other Purchased / Professional / Consulting		10,000	Consultant support for school start-up.
TOTAL CONTRACTED SERVICES		**14,000**	

SCHOOL OPERATIONS		
Board Expenses	- 0	
Classroom / Teaching Supplies & Materials	15,000	Montessori materials
Special Ed Supplies & Materials	- 0	
Textbooks / Workbooks	- 0	
Supplies & Materials other	2,500	Office supplies/materials
Equipment / Furniture	17,000	Montessori and staff furniture
Telephone	- 0	
Technology	- 0	
Student Testing & Assessment	- 0	
Field Trips	- 0	
Transportation (student)	- 0	
Student Services - other	- 0	
Office Expense	- 0	
Staff Development	20,000	PD and training for all staff
Staff Recruitment	- 0	
Student Recruitment / Marketing	1,500	
School Meals / Lunch	- 0	
Travel (Staff)	- 0	
Fundraising	- 0	
Other	- 0	
TOTAL SCHOOL OPERATIONS	**56,000**	
FACILITY OPERATION & MAINTENANCE		
Insurance	- 0	
Janitorial	- 0	
Building and Land Rent / Lease / Facility Finance Interest	- 0	
Repairs & Maintenance	10,000	Expected renovations for facility
Equipment / Furniture	- 0	
Security	- 0	
Utilities	- 0	
TOTAL FACILITY OPERATION & MAINTENANCE	**10,000**	
DEPRECIATION & AMORTIZATION	- 0	
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	- 0	
TOTAL EXPENSES	**197,100**	
NET INCOME	**2,900**	

PRE-OPENING CASH FLOW 1-YEAR	**Please enter school name on tab - "1) School Information"**												
***NOTE:** Please enter "Description of Assumptions" on tab "4) Pre-Opening Period Budget."*	**PROJECTED CASH FLOW FOR SCHOOLS PROPOSING TO OPEN IN THE SECOND YEAR FOLLOWING PROPOSAL SUBMISSION July 1, 2025 - June 30, 2026**												
Total Revenue	200,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	200,000
Total Expenses	60,925	16,425	16,425	15,925	10,925	10,925	10,925	10,925	10,925	10,925	10,925	10,925	197,100
Net Income	139,075	(16,425)	(16,425)	(15,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	2,900
Cash Flow Adjustments	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Beginning Cash Balance	- 0	139,075	122,650	106,225	90,300	79,375	68,450	57,525	46,600	35,675	24,750	13,825	- 0
Net Income	139,075	122,650	106,225	90,300	79,375	68,450	57,525	46,600	35,675	24,750	13,825	2,900	2,900

	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
REVENUE													TRUE
REVENUES FROM STATE SOURCES													
Grants													
Stimulus	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
DYCD (Department of Youth and Community Development)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM STATE SOURCES	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
REVENUE FROM FEDERAL FUNDING													
Grants													
Charter School Program (CSP) Planning & Implementation	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	200,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	200,000
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM FEDERAL SOURCES	200,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	200,000
LOCAL and OTHER REVENUE													
Contributions and Donations	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Fundraising	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Erate Reimbursement	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Earnings on Investments	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Interest Income	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Food Service (Income from meals)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Text Book	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
OTHER	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM LOCAL and OTHER SOURCES	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE	200,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	200,000
EXPENSES													

EXPENSES														
ADMINISTRATIVE PERSONNEL COSTS	E No. of Positions													
Executive Management	1.00	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	100,000
Instructional Management	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Deans, Directors & Coordinators	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
CFO / Director of Finance	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Operation / Business Manager	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Administrative Staff	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL ADMINISTRATIVE STAFF	1.00	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	100,000
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Teachers - SPED	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Substitute Teachers	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Teaching Assistants	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Specialty Teachers	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Aides	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Therapists & Counselors	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL INSTRUCTIONAL	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Librarian	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Custodian	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Security	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL NON-INSTRUCTIONAL	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
SUBTOTAL PERSONNEL SERVICE COSTS	1.00	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	100,000
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		83	83	83	83	83	83	83	83	83	83	83	83	1,000
Fringe / Employee Benefits		1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	16,100
Retirement / Pension		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL PAYROLL TAXES AND BENEFITS		1,425	1,425	1,425	1,425	1,425	1,425	1,425	1,425	1,425	1,425	1,425	1,425	17,100
TOTAL PERSONNEL SERVICE COSTS	1.00	9,758	9,758	9,758	9,758	9,758	9,758	9,758	9,758	9,758	9,758	9,758	9,758	117,100
CONTRACTED SERVICES														
Accounting / Audit		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Legal		333	333	333	333	333	333	333	333	333	333	333	333	4,000
Management Company Fee		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Nurse Services		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Food Service / School Lunch		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Payroll Services		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Special Ed Services		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Titlement Services (i.e. Title I)		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other Purchased / Professional / Consulting		833	833	833	833	833	833	833	833	833	833	833	833	10,000
TOTAL CONTRACTED SERVICES		1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	14,000

SCHOOL OPERATIONS													
Board Expenses	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Classroom / Teaching Supplies & Materials	15,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	15,000
Special Ed Supplies & Materials	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Textbooks / Workbooks	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Supplies & Materials other	2,500	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	2,500
Equipment / Furniture	17,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	17,000
Telephone	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Technology	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Student Testing & Assessment	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Field Trips	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Transportation (student)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Student Services - other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Office Expense	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Staff Development	5,000	5,000	5,000	5,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	20,000
Staff Recruitment	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Student Recruitment / Marketing	500	500	500	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	1,500
School Meals / Lunch	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Travel (Staff)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Fundraising	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL SCHOOL OPERATIONS	40,000	5,500	5,500	5,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	56,000
FACILITY OPERATION & MAINTENANCE													
Insurance	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Janitorial	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Building and Land Rent / Lease / Facility Finance Interest	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Repairs & Maintenance	10,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	10,000
Equipment / Furniture	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Security	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Utilities	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL FACILITY OPERATION & MAINTENANCE	10,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	10,000
DEPRECIATION & AMORTIZATION	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL EXPENSES	**60,925**	**16,425**	**16,425**	**15,925**	**10,925**	**10,925**	**10,925**	**10,925**	**10,925**	**10,925**	**10,925**	**10,925**	197,100
NET INCOME	**139,075**	**(16,425)**	**(16,425)**	**(15,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**(10,925)**	**2,900**
CASH FLOW ADJUSTMENTS													
OPERATING ACTIVITIES													
Description (e.g. Add Back Depreciation)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Operating Activities	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**
INVESTMENT ACTIVITIES													
Description (e.g. Subtract Property and Equipment Expenditures)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Investment Activities	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**
FINANCING ACTIVITIES													
Description (e.g. Add Expected Proceeds from a Loan)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Financing Activities	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**
Total Cash Flow Adjustments	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	- 0
NET INCOME	139,075	(16,425)	(16,425)	(15,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	(10,925)	2,900
Beginning Cash Balance	**- 0**	**139,075**	**122,650**	**106,225**	**90,300**	**79,375**	**68,450**	**57,525**	**46,600**	**35,675**	**24,750**	**13,825**	- 0
ENDING CASH BALANCE	139,075	122,650	106,225	90,300	79,375	68,450	57,525	46,600	35,675	24,750	13,825	2,900	2,900

YEAR 1 BUDGET AND ASSUMPTION			Please enter school name on tab - "1) School Information" PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE JULY 1, 2026 - JUNE 30, 2027						DESCRI *NOTE: State assump Budget in
Total Revenue			**436,054**	**68,720**	**- 0**	**- 0**	**- 0**	**504,774**	
Total Expenses			**280,399**	**- 0**	**- 0**	**- 0**	**117,100**	**397,499**	
Net Income			**155,655**	**68,720**	**- 0**	**- 0**	**(117,100)**	**107,275**	
Budgeted Student Enrollment			**16**	**- 0**				**16**	
			PROGRAM SERVICES			SUPPORT SERVICES			
			REGULAR EDUCAT	SPECIAL EDUCATI(	OTHER	FUNDRAISING	MANAGEMENT & G	TOTAL	
REVENUE									
REVENUES FROM STATE SOURCES									
Per Pupil Revenue		Basic Tuition (2024-25)							
PRIMARY School District:	Ballston Spa Central School District	14,259	228,144					228,144	
Other District 1:		- 0	- 0					- 0	
Other District 2:		- 0	- 0					- 0	
Other District 3:		- 0	- 0					- 0	
Other District 4:		- 0	- 0					- 0	
Other District 5:		- 0	- 0					- 0	
Other District 6:		- 0	- 0					- 0	
Other District 7:		- 0	- 0					- 0	
Other District 8:		- 0	- 0					- 0	
Other District 9:		- 0	- 0					- 0	
Other District 10:		- 0	- 0					- 0	
Other District 11:		- 0	- 0					- 0	
Other District 12:		- 0	- 0					- 0	
Other District 13:		- 0	- 0					- 0	
Other District 14:		- 0	- 0					- 0	
Other School Districts' Revenue:	(Weighted Avg.)	- 0	- 0					- 0	
TOTAL Per Pupil Revenue	(Weighted Avg.)	14,259	228,144					228,144	
Special Education Revenue				68,720				68,720	
NYC DoE Rental Assistance			- 0	- 0	- 0	- 0	- 0	- 0	
Grants									
Stimulus			- 0	- 0	- 0	- 0	- 0	- 0	
DYCD (Department of Youth and Community Development)			- 0	- 0	- 0	- 0	- 0	- 0	
Other			- 0	- 0	- 0	- 0	- 0	- 0	
Other			- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM STATE SOURCES			228,144	68,720	- 0	- 0	- 0	296,864	
REVENUE FROM FEDERAL FUNDING									
IDEA Special Needs			- 0	- 0	- 0			- 0	
Title I			7,910	- 0	- 0			7,910	
Title Funding - Other			- 0	- 0	- 0			- 0	
School Food Service (Free Lunch)			- 0	- 0	- 0			- 0	
Grants									
Charter School Program (CSP) Planning & Implementation			200,000	- 0	- 0	- 0	- 0	200,000	Wildflower CSP grant
Other			- 0	- 0	- 0	- 0	- 0	- 0	
Other			- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM FEDERAL SOURCES			207,910	- 0	- 0	- 0	- 0	207,910	

LOCAL and OTHER REVENUE									
Contributions and Donations			- 0	- 0	- 0	- 0	- 0	- 0	
Fundraising			- 0	- 0	- 0	- 0	- 0	- 0	
Erate Reimbursement			- 0	- 0	- 0	- 0	- 0	- 0	
Earnings on Investments			- 0	- 0	- 0	- 0	- 0	- 0	
Interest Income			- 0	- 0	- 0	- 0	- 0	- 0	
Food Service (Income from meals)			- 0	- 0	- 0	- 0	- 0	- 0	
Text Book			- 0	- 0	- 0	- 0	- 0	- 0	
OTHER			- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE			**436,054**	**68,720**	**- 0**	**- 0**	**- 0**	**504,774**	
EXPENSES									
ADMINISTRATIVE STAFF PERSONNEL COSTS		FTE No. of Positions							
Executive Management		1.00	- 0	- 0	- 0	- 0	100,000	100,000	
Instructional Management		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Deans, Directors & Coordinators		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
CFO / Director of Finance		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Operation / Business Manager		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Administrative Staff		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL ADMINISTRATIVE STAFF		1.00	- 0	- 0	- 0	- 0	100,000	100,000	
INSTRUCTIONAL PERSONNEL COSTS									
Teachers - Regular		1.00	60,000	- 0	- 0	- 0	- 0	60,000	
Teachers - SPED		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Substitute Teachers		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Teaching Assistants		1.00	41,600	- 0	- 0	- 0	- 0	41,600	
Specialty Teachers		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Aides		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Therapists & Counselors		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL INSTRUCTIONAL		2.00	101,600	- 0	- 0	- 0	- 0	101,600	
NON-INSTRUCTIONAL PERSONNEL COSTS									
Nurse		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Librarian		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Custodian		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Security		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
Other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL NON-INSTRUCTIONAL		- 0	- 0	- 0	- 0	- 0	- 0	- 0	
SUBTOTAL PERSONNEL SERVICE COSTS		3.00	101,600.00	- 0	- 0	- 0	100,000	201,600	
PAYROLL TAXES AND BENEFITS									
Payroll Taxes			1,016	- 0	- 0	- 0	1,000	2,016	
Fringe / Employee Benefits			23,442	- 0	- 0	- 0	16,100	39,542	
Retirement / Pension			- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL PAYROLL TAXES AND BENEFITS			24,458	- 0	- 0	- 0	17,100	41,558	
TOTAL PERSONNEL SERVICE COSTS		3.00	126,058	- 0	- 0	- 0	117,100	243,158	
CONTRACTED SERVICES									
Accounting / Audit			14,400	- 0	- 0	- 0	- 0	14,400	Back office and audit
Legal			5,000	- 0	- 0	- 0	- 0	5,000	
Management Company Fee			9,143	- 0	- 0	- 0	- 0	9,143	
Nurse Services			2,000	- 0	- 0	- 0	- 0	2,000	
Food Service / School Lunch			- 0	- 0	- 0	- 0	- 0	- 0	
Payroll Services			1,800	- 0	- 0	- 0	- 0	1,800	
Special Ed Services			- 0	- 0	- 0	- 0	- 0	- 0	
Titlement Services (i.e. Title I)			- 0	- 0	- 0	- 0	- 0	- 0	
Other Purchased / Professional / Consulting			15,250	- 0	- 0	- 0	- 0	15,250	Educational consultants and substitutes
TOTAL CONTRACTED SERVICES			47,593	- 0	- 0	- 0	- 0	47,593	

SCHOOL OPERATIONS							
Board Expenses	- 0	- 0	- 0	- 0	- 0	- 0	
Classroom / Teaching Supplies & Materials	21,000	- 0	- 0	- 0	- 0	21,000	Montessori materials, supplies, and consumables.
Special Ed Supplies & Materials	- 0	- 0	- 0	- 0	- 0	- 0	
Textbooks / Workbooks	- 0	- 0	- 0	- 0	- 0	- 0	
Supplies & Materials other	7,000	- 0	- 0	- 0	- 0	7,000	Office supplies
Equipment / Furniture	10,500	- 0	- 0	- 0	- 0	10,500	Classroom and staff furniture
Telephone	- 0	- 0	- 0	- 0	- 0	- 0	
Technology	4,800	- 0	- 0	- 0	- 0	4,800	
Student Testing & Assessment	- 0	- 0	- 0	- 0	- 0	- 0	
Field Trips	8,000	- 0	- 0	- 0	- 0	8,000	
Transportation (student)	- 0	- 0	- 0	- 0	- 0	- 0	
Student Services - other	- 0	- 0	- 0	- 0	- 0	- 0	
Office Expense	- 0	- 0	- 0	- 0	- 0	- 0	
Staff Development	3,500	- 0	- 0	- 0	- 0	3,500	
Staff Recruitment	- 0	- 0	- 0	- 0	- 0	- 0	
Student Recruitment / Marketing	500	- 0	- 0	- 0	- 0	500	
School Meals / Lunch	- 0	- 0	- 0	- 0	- 0	- 0	
Travel (Staff)	- 0	- 0	- 0	- 0	- 0	- 0	
Fundraising	- 0	- 0	- 0	- 0	- 0	- 0	
Other	3,048	- 0	- 0	- 0	- 0	3,048	Authorizer fee
TOTAL SCHOOL OPERATIONS	58,348	- 0	- 0	- 0	- 0	58,348	
FACILITY OPERATION & MAINTENANCE							
Insurance	8,000	- 0	- 0	- 0	- 0	8,000	
Janitorial	12,000	- 0	- 0	- 0	- 0	12,000	Custodial services
Building and Land Rent / Lease / Facility Finance Interest	18,400	- 0	- 0	- 0	- 0	18,400	
Repairs & Maintenance	1,000	- 0	- 0	- 0	- 0	1,000	
Equipment / Furniture	1,200	- 0	- 0	- 0	- 0	1,200	Custodial supplies
Security	- 0	- 0	- 0	- 0	- 0	- 0	
Utilities	7,800	- 0	- 0	- 0	- 0	7,800	
TOTAL FACILITY OPERATION & MAINTENANCE	48,400	- 0	- 0	- 0	- 0	48,400	
DEPRECIATION & AMORTIZATION	- 0	- 0	- 0	- 0	- 0	- 0	
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL EXPENSES	280,399	- 0	- 0	- 0	117,100	397,499	
NET INCOME	155,655	68,720	- 0	- 0	(117,100)	107,275	
ENROLLMENT - *School Districts Are Linked To Above Entries*							
PRIMARY School District: Ballston Spa Central School District	16					16	
Other District 1: 0	- 0					- 0	
Other District 2: 0	- 0					- 0	
Other District 3: 0	- 0					- 0	
Other District 4: 0	- 0					- 0	
Other District 5: 0	- 0					- 0	
Other District 6: 0	- 0					- 0	
Other District 7: 0	- 0					- 0	
Other District 8: 0	- 0					- 0	
Other District 9: 0	- 0					- 0	
Other District 10: 0	- 0					- 0	
Other District 11: 0	- 0					- 0	
Other District 12: 0	- 0					- 0	
Other District 13: 0	- 0					- 0	
Other District 14: 0	- 0					- 0	
All Other School Districts	- 0					- 0	
TOTAL ENROLLMENT	**16**					**16**	
REVENUE PER PUPIL	27,253					31,548	
EXPENSES PER PUPIL	17,525					24,844	

YEAR 1 CASH FLOW *(FIRST YEAR OF CHARTER)*	Please enter school name on tab - "1) School Information" PROJECTED CASH FLOW FOR YEAR ONE OF OPERATIONS JULY 1, 2026 - JUNE 30, 2027												
Total Revenue	**225,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**504,774**
Total Expenses	**74,829**	**32,377**	**31,579**	**28,079**	**30,079**	**28,079**	**30,079**	**28,079**	**30,079**	**28,079**	**28,079**	**28,079**	**397,499**
Net Income	**150,569**	**(6,979)**	**(6,181)**	**(2,681)**	**(4,681)**	**(2,681)**	**(4,681)**	**(2,681)**	**(4,681)**	**(2,681)**	**(2,681)**	**(2,681)**	**107,275**
Cash Flow Adjustments	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**	**- 0**
Beginning Cash Balance	**- 0**	**150,569**	**143,589**	**137,408**	**134,726**	**130,045**	**127,363**	**122,682**	**120,001**	**115,319**	**112,638**	**109,956**	**- 0**
Ending Cash Balance	**150,569**	**143,589**	**137,408**	**134,726**	**130,045**	**127,363**	**122,682**	**120,001**	**115,319**	**112,638**	**109,956**	**107,275**	**107,275**

			JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
REVENUE			*** Totals (Column U) for all lines above Cash Flow Adjustments should equal the Totals (Column N) on tab "7) Year 1 Budget & Assumptions."**												
REVENUES FROM STATE SOURCES															
Per Pupil Revenue		Basic Tuition (2024-25)													
PRIMARY School District:	Ballston Spa Central School District	14,259	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	228,144
Other District 1:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 2:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 3:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 4:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 5:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 6:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 7:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 8:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 9:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 10:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 11:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 12:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 13:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other District 14:	0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other School Districts' Revenue:	(Weighted Avg.)	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL Per Pupil Revenue	(Weighted Avg.)	14,259	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	19,012	228,144
Special Education Revenue			5,727	5,727	5,727	5,727	5,727	5,727	5,727	5,727	5,727	5,727	5,727	5,727	68,720
NYC DoE Rental Assistance			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Grants															
Stimulus			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
DYCD (Department of Youth and Community Developmt.)			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM STATE SOURCES			24,739	24,739	24,739	24,739	24,739	24,739	24,739	24,739	24,739	24,739	24,739	24,739	296,864
REVENUE FROM FEDERAL FUNDING															
IDEA Special Needs			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Title I			659	659	659	659	659	659	659	659	659	659	659	659	7,910
Title Funding - Other			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
School Food Service (Free Lunch)			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Grants															
Charter School Program (CSP) Planning & Implementation			200,000	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	200,000
Other			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM FEDERAL SOURCES			200,659	659	659	659	659	659	659	659	659	659	659	659	207,910
LOCAL and OTHER REVENUE															
Contributions and Donations			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Fundraising			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Erate Reimbursement			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Earnings on Investments			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Interest Income			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Food Service (Income from meals)			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Text Book			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
OTHER			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL REVENUE			**225,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**25,398**	**504,774**
EXPENSES															

EXPENSES	No. of Positions													
ADMINISTRATIVE STAFF PERSONNEL COSTS														
Executive Management	1.00	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	100,000
Instructional Management	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Deans, Directors & Coordinators	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
CFO / Director of Finance	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Operation / Business Manager	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Administrative Staff	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL ADMINISTRATIVE STAFF	1.00	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	8,333	100,000
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	1.00	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	60,000
Teachers - SPED	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Substitute Teachers	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Teaching Assistants	1.00	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	3,467	41,600
Specialty Teachers	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Aides	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Therapists & Counselors	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL INSTRUCTIONAL	2.00	8,467	8,467	8,467	8,467	8,467	8,467	8,467	8,467	8,467	8,467	8,467	8,467	101,600
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Librarian	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Custodian	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Security	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL NON-INSTRUCTIONAL	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
SUBTOTAL PERSONNEL SERVICE COSTS	3.00	16,800	16,800	16,800	16,800	16,800	16,800	16,800	16,800	16,800	16,800	16,800	16,800	201,600
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		168	168	168	168	168	168	168	168	168	168	168	168	2,016
Fringe / Employee Benefits		3,295	3,295	3,295	3,295	3,295	3,295	3,295	3,295	3,295	3,295	3,295	3,295	39,542
Retirement / Pension		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL PAYROLL TAXES AND BENEFITS		3,463	3,463	3,463	3,463	3,463	3,463	3,463	3,463	3,463	3,463	3,463	3,463	41,558
TOTAL PERSONNEL SERVICE COSTS	3.00	20,263	20,263	20,263	20,263	20,263	20,263	20,263	20,263	20,263	20,263	20,263	20,263	243,158
CONTRACTED SERVICES														
Accounting / Audit		1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	14,400
Legal		417	417	417	417	417	417	417	417	417	417	417	417	5,000
Management Company Fee		762	762	762	762	762	762	762	762	762	762	762	762	9,143
Nurse Services		167	167	167	167	167	167	167	167	167	167	167	167	2,000
Food Service / School Lunch		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Payroll Services		150	150	150	150	150	150	150	150	150	150	150	150	1,800
Special Ed Services		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Titlement Services (i.e. Title I)		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other Purchased / Professional / Consulting		1,271	1,271	1,271	1,271	1,271	1,271	1,271	1,271	1,271	1,271	1,271	1,271	15,250
TOTAL CONTRACTED SERVICES		3,966	3,966	3,966	3,966	3,966	3,966	3,966	3,966	3,966	3,966	3,966	3,966	47,593
SCHOOL OPERATIONS														
Board Expenses		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Classroom / Teaching Supplies & Materials		21,000		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	21,000
Special Ed Supplies & Materials		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Textbooks / Workbooks		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Supplies & Materials other		7,000		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	7,000
Equipment / Furniture		10,500		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	10,500
Telephone		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Technology		4,800		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	4,800
Student Testing & Assessment		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Field Trips		- 0	- 0	2,000	- 0	2,000	- 0	2,000	- 0	2,000	- 0	- 0	- 0	8,000
Transportation (student)		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Student Services - other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Office Expense		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Staff Development		1,000	1,000	1,500	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	3,500
Staff Recruitment		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Student Recruitment / Marketing		250	250	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	500
School Meals / Lunch		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Travel (Staff)		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Fundraising		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other		- 0	3,048	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	3,048
TOTAL SCHOOL OPERATIONS		44,550	4,298	3,500	- 0	2,000	- 0	2,000	- 0	2,000	- 0	- 0	- 0	58,348
FACILITY OPERATION & MAINTENANCE														
Insurance		667	667	667	667	667	667	667	667	667	667	667	667	8,000
Janitorial		1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	12,000
Building and Land Rent / Lease / Facility Finance Interest		1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	18,400
Repairs & Maintenance		1,000		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	1,000
Equipment / Furniture		1,200		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	1,200
Security		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Utilities		650	650	650	650	650	650	650	650	650	650	650	650	7,800
TOTAL FACILITY OPERATION & MAINTENANCE		6,050	3,850	3,850	3,850	3,850	3,850	3,850	3,850	3,850	3,850	3,850	3,850	48,400
DEPRECIATION & AMORTIZATION		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
DISSOLUTION ESCROW & RESERVES / CONTIGENCY		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
TOTAL EXPENSES		74,829	32,377	31,579	28,079	30,079	28,079	30,079	28,079	30,079	28,079	28,079	28,079	397,499
NET INCOME		150,569	(6,979)	(6,181)	(2,681)	(4,681)	(2,681)	(4,681)	(2,681)	(4,681)	(2,681)	(2,681)	(2,681)	107,275
CASH FLOW ADJUSTMENTS														
OPERATING ACTIVITIES														
Example - Add Back Depreciation		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Operating Activities		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
INVESTMENT ACTIVITIES														
Example - Subtract Property and Equipment Expenditures		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Investment Activities		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
FINANCING ACTIVITIES														
Example - Add Expected Proceeds from a Loan or Line of Credit		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Other		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Financing Activities		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
Total Cash Flow Adjustments		- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0	- 0
NET INCOME		150,569	(6,979)	(6,181)	(2,681)	(4,681)	(2,681)	(4,681)	(2,681)	(4,681)	(2,681)	(2,681)	(2,681)	107,275
Beginning Cash Balance		- 0	150,569	143,589	137,408	134,726	130,045	127,363	122,682	120,001	115,319	112,638	109,956	- 0
ENDING CASH BALANCE		150,569	143,589	137,408	134,726	130,045	127,363	122,682	120,001	115,319	112,638	109,956	107,275	107,275

5 YEAR BUDGET AND CASH FLOW ADJUSTMENTS

***NOTE:** Projected Five Year Budget on this tab should be for the first five years of actual operations.*

PLEASE ENTER SCHOOL NAME ON TAB - "1) SCHOOL INFORMATION"

PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD
2026-27 THROUGH 2030-31

DESCR

***NOTE:** State assumptior*

Total Revenue				**504,774**	**870,876**	**646,670**	**895,032**	**1,264,910**	
Total Expenses				**397,499**	**570,055**	**621,707**	**814,548**	**1,028,809**	
Net Income (Before Cash Flow Adjustments)				**107,275**	**300,821**	**24,963**	**80,484**	**236,101**	
Budgeted Student Enrollment				**16**	**24**	**32**	**43**	**59**	
				Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	
				2026-27	2027-28	2028-29	2029-30	2030-31	
REVENUE				**Per Pupil Revenue Percentage Increase**					
REVENUES FROM STATE SOURCES				**0.0%**	**3.0%**	**3.0%**	**3.0%**	**3.0%**	
Per Pupil Revenue			Basic Tuition (2024-25)						
PRIMARY School District:	Ballston Spa Central School District		14,259	228,144	352,482	484,076	669,991	946,869	
Other District 1:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 2:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 3:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 4:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 5:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 6:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 7:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 8:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 9:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 10:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 11:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 12:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 13:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other District 14:		0	- 0	- 0	- 0	- 0	- 0	- 0	
Other School Districts' Revenue:		(Weighted Avg.)	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL Per Pupil Revenue		(Weighted Avg.)	14,259	228,144	352,482	484,076	669,991	946,869	
Special Education Revenue				68,720	106,172	145,810	201,810	285,210	
NYC DoE Rental Assistance				- 0	- 0	- 0	- 0	- 0	
Grants									
Stimulus				- 0	- 0	- 0	- 0	- 0	
DYCD (Department of Youth and Community Developmt.)				- 0	- 0	- 0	- 0	- 0	
Other				- 0	- 0	- 0	- 0	- 0	
Other				- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM STATE SOURCES				296,864	458,654	629,886	871,801	1,232,079	
REVENUE FROM FEDERAL FUNDING									
IDEA Special Needs				- 0	- 0	- 0	- 0	- 0	
Title I				7,910	12,222	16,784	23,231	32,831	
Title Funding - Other				- 0	- 0	- 0	- 0	- 0	
School Food Service (Free Lunch)				- 0	- 0	- 0	- 0	- 0	
Grants									
Charter School Program (CSP) Planning & Implementation				200,000	400,000	- 0	- 0	- 0	Wildflower CSP Grant
Other				- 0	- 0	- 0	- 0	- 0	
Other				- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM FEDERAL SOURCES				207,910	412,222	16,784	23,231	32,831	

LOCAL and OTHER REVENUE							
Contributions and Donations		- 0	- 0	- 0	- 0	- 0	
Fundraising		- 0	- 0	- 0	- 0	- 0	
Erate Reimbursement		- 0	- 0	- 0	- 0	- 0	
Earnings on Investments		- 0	- 0	- 0	- 0	- 0	
Interest Income		- 0	- 0	- 0	- 0	- 0	
Food Service (Income from meals)		- 0	- 0	- 0	- 0	- 0	
Text Book		- 0	- 0	- 0	- 0	- 0	
OTHER		- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE FROM LOCAL and OTHER SOURCES		- 0	- 0	- 0	- 0	- 0	
TOTAL REVENUE		**504,774**	**870,876**	**646,670**	**895,032**	**1,264,910**	
EXPENSES							
ADMINISTRATIVE STAFF PERSONNEL COSTS	Year 1 No. of Position						***NOTE:***
Executive Management	1.00	100,000	100,000	100,000	100,000	100,000	
Instructional Management	- 0	- 0	- 0	- 0	- 0	- 0	
Deans, Directors & Coordinators	- 0	- 0	- 0	- 0	- 0	- 0	
CFO / Director of Finance	- 0	- 0	- 0	- 0	- 0	- 0	
Operation / Business Manager	- 0	- 0	- 0	- 0	- 0	- 0	
Administrative Staff	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL ADMINISTRATIVE STAFF	1.00	100,000	100,000	100,000	100,000	100,000	
INSTRUCTIONAL PERSONNEL COSTS							
Teachers - Regular	1.00	60,000	120,000	120,000	180,000	240,000	
Teachers - SPED	- 0	- 0	- 0	- 0	- 0	- 0	
Substitute Teachers	- 0	- 0	- 0	- 0	- 0	- 0	
Teaching Assistants	1.00	41,600	83,200	83,200	124,800	166,400	
Specialty Teachers	- 0	- 0	- 0	- 0	- 0	- 0	
Aides	- 0	- 0	- 0	- 0	- 0	- 0	
Therapists & Counselors	- 0	- 0	- 0	- 0	- 0	- 0	
Other	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL INSTRUCTIONAL	2.00	101,600	203,200	203,200	304,800	406,400	
NON-INSTRUCTIONAL PERSONNEL COSTS							
Nurse	- 0	- 0	- 0	- 0	- 0	- 0	
Librarian	- 0	- 0	- 0	- 0	- 0	- 0	
Custodian	- 0	- 0	- 0	- 0	- 0	- 0	
Security	- 0	- 0	- 0	- 0	- 0	- 0	
Other	- 0	- 0	- 0	- 0	- 0	- 0	
TOTAL NON-INSTRUCTIONAL	- 0	- 0	- 0	- 0	- 0	- 0	
SUBTOTAL PERSONNEL SERVICE COSTS	3.00	201,600	303,200	303,200	404,800	506,400	
PAYROLL TAXES AND BENEFITS							
Payroll Taxes		2,016	3,123	3,217	4,423	5,700	
Fringe / Employee Benefits		39,542	65,594	68,318	97,712	129,491	
Retirement / Pension		- 0	- 0	- 0	- 0	- 0	
TOTAL PAYROLL TAXES AND BENEFITS		41,558	68,717	71,535	102,135	135,191	
TOTAL PERSONNEL SERVICE COSTS	3.00	243,158	371,917	374,735	506,935	641,591	
CONTRACTED SERVICES							
Accounting / Audit		14,400	14,832	15,277	15,735	16,207	
Legal		5,000	5,150	5,305	5,464	5,628	
Management Company Fee		9,143	14,126	19,400	26,851	37,947	
Nurse Services		2,000	2,060	2,122	2,185	2,251	
Food Service / School Lunch		- 0	- 0	- 0	- 0	- 0	
Payroll Services		1,800	1,854	1,910	1,967	2,026	
Special Ed Services		- 0	- 0	- 0	- 0	- 0	
Titlement Services (i.e. Title I)		- 0	- 0	- 0	- 0	- 0	
Other Purchased / Professional / Consulting		15,250	15,708	16,179	16,664	17,164	
TOTAL CONTRACTED SERVICES		47,593	53,730	60,193	68,866	81,223	
SCHOOL OPERATIONS							

SCHOOL OPERATIONS						
Board Expenses	- 0	- 0	- 0	- 0	- 0	
Classroom / Teaching Supplies & Materials	21,000	29,870	39,253	52,451	72,033	
Special Ed Supplies & Materials	- 0	- 0	- 0	- 0	- 0	
Textbooks / Workbooks	- 0	- 0	- 0	- 0	- 0	
Supplies & Materials other	7,000	7,210	7,426	7,649	7,879	
Equipment / Furniture	10,500	14,935	19,627	26,225	36,016	
Telephone	- 0	- 0	- 0	- 0	- 0	
Technology	4,800	2,400	2,400	2,400	2,400	
Student Testing & Assessment	- 0	- 0	- 0	- 0	- 0	
Field Trips	8,000	12,360	16,974	23,494	33,203	
Transportation (student)	- 0	- 0	- 0	- 0	- 0	
Student Services - other	- 0	- 0	- 0	- 0	- 0	
Office Expense	- 0	- 0	- 0	- 0	- 0	
Staff Development	3,500	3,605	3,713	3,825	3,939	
Staff Recruitment	- 0	- 0	- 0	- 0	- 0	
Student Recruitment / Marketing	500	515	530	546	563	
School Meals / Lunch	- 0	- 0	- 0	- 0	- 0	
Travel (Staff)	- 0	- 0	- 0	- 0	- 0	
Fundraising	- 0	- 0	- 0	- 0	- 0	
Other	3,048	4,709	6,467	8,950	12,649	
TOTAL SCHOOL OPERATIONS	58,348	75,604	96,390	125,540	168,682	
FACILITY OPERATION & MAINTENANCE						
Insurance	8,000	8,240	8,487	8,742	9,004	
Janitorial	12,000	12,360	12,731	13,113	13,506	
Building and Land Rent / Lease / Facility Finance Interest	18,400	37,904	58,562	80,425	103,547	
Repairs & Maintenance	1,000	1,030	1,061	1,093	1,126	
Equipment / Furniture	1,200	1,236	1,273	1,311	1,351	
Security	- 0	- 0	- 0	- 0	- 0	
Utilities	7,800	8,034	8,275	8,523	8,779	
TOTAL FACILITY OPERATION & MAINTENANCE	48,400	68,804	90,389	113,207	137,313	
DEPRECIATION & AMORTIZATION	- 0	- 0	- 0	- 0	- 0	
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	- 0	- 0	- 0	- 0	- 0	
TOTAL EXPENSES	**397,499**	**570,055**	**621,707**	**814,548**	**1,028,809**	
NET INCOME	**107,275**	**300,821**	**24,963**	**80,484**	**236,101**	

ENROLLMENT - *School Districts Are Linked To Above Entries*							
PRIMARY School District:	Ballston Spa Central School District		16	24	32	43	59
Other District 1:		0	- 0	- 0	- 0	- 0	- 0
Other District 2:		0	- 0	- 0	- 0	- 0	- 0
Other District 3:		0	- 0	- 0	- 0	- 0	- 0
Other District 4:		0	- 0	- 0	- 0	- 0	- 0
Other District 5:		0	- 0	- 0	- 0	- 0	- 0
Other District 6:		0	- 0	- 0	- 0	- 0	- 0
Other District 7:		0	- 0	- 0	- 0	- 0	- 0
Other District 8:		0	- 0	- 0	- 0	- 0	- 0
Other District 9:		0	- 0	- 0	- 0	- 0	- 0
Other District 10:		0	- 0	- 0	- 0	- 0	- 0
Other District 11:		0	- 0	- 0	- 0	- 0	- 0
Other District 12:		0	- 0	- 0	- 0	- 0	- 0
Other District 13:		0	- 0	- 0	- 0	- 0	- 0
Other District 14:		0	- 0	- 0	- 0	- 0	- 0
All Other School Districts		0	- 0	- 0	- 0	- 0	- 0
TOTAL ENROLLMENT			**16**	**24**	**32**	**43**	**59**
REVENUE PER PUPIL			**31,548**	**36,287**	**20,208**	**20,815**	**21,439**
EXPENSES PER PUPIL			**24,844**	**23,752**	**19,428**	**18,943**	**17,437**
CASH FLOW ADJUSTMENTS							
OPERATING ACTIVITIES							
Example - Add Back Depreciation			- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0
Total Operating Activities			- 0	- 0	- 0	- 0	- 0
INVESTMENT ACTIVITIES							
Example - Subtract Property and Equipment Expenditures			- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0
Total Investment Activities			- 0	- 0	- 0	- 0	- 0
FINANCING ACTIVITIES							
Example - Add Expected Proceeds from a Loan or Line of Credit			- 0	- 0	- 0	- 0	- 0
Other			- 0	- 0	- 0	- 0	- 0
Total Financing Activities			- 0	- 0	- 0	- 0	- 0
Total Cash Flow Adjustments			**- 0**	**- 0**	**- 0**	**- 0**	**- 0**
NET INCOME			**107,275**	**300,821**	**24,963**	**80,484**	**236,101**
Beginning Cash Balance			- 0	107,275	408,096	433,059	513,544
ENDING CASH BALANCE			**107,275**	**408,096**	**433,059**	**513,544**	**749,645**

5-YEAR FISCAL IMPACT REPORT

Largest Enrollment District: Ballston Spa Central School District							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for Ballston Spa Central School District School District	Projected Impact (% of District's Total Budget)
Year 1 (2026-27)	16	14,259	228,144	- 0	228,144	107,179,996	0.213%
Year 2 (2027-28)	24	14,687	352,482	- 0	352,482	107,179,996	0.329%
Year 3 (2028-29)	32	15,127	484,076	- 0	484,076	107,179,996	0.452%
Year 4 (2029-30)	43	15,581	669,991	- 0	669,991	107,179,996	0.625%
Year 5 (2030-31)	59	16,049	946,869	- 0	946,869	107,179,996	0.883%

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	This is the 2024-2025 budget, which is all that's been approved. https://www.bscsd.org/about/financial-information#:~:text=The%20Board%20of%20Education%20approved,the%202023%2D2024%20tax%20levy.
OTHER NOTES:	

Second Largest Enrollment District: N/A							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for Select from drop-down list → School District	Projected Impact (% of District's Total Budget)
Year 1 (2026-27)	- 0	- 0	- 0	- 0	- 0	- 0	⚠
Year 2 (2027-28)	- 0	- 0	- 0	- 0	- 0	- 0	⚠
Year 3 (2028-29)	- 0	- 0	- 0	- 0	- 0	- 0	⚠
Year 4 (2029-30)	- 0	- 0	- 0	- 0	- 0	- 0	⚠
Year 5 (2030-31)	- 0	- 0	- 0	- 0	- 0	- 0	⚠

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	
OTHER NOTES:	

R-21f - Letters of Commitment

At this point in time, WUNYCS does not have any letters of commitment for any funding from private contributions, grant funds, or other philanthropic sources included in our school budget. We will work towards securing further funding throughout the application phase and especially once approved for our charter.

R-21g - Non-SUNY Financials

Wildflower Upstate New York Charter School is partnering with The Wildflower Foundation and as such must submit a business plan. The information required in this request will be provided in the business plan.

R-22 - Action Plan

WUNYCS Pre-Opening Timeline- Pending Approval through SUNY around November 2025 approximately

(December 2025 – September 2026)

1. Securing a Facility (Including Necessary Construction)

Identify and secure a facility (lease agreement, zoning compliance, ADA accessibility review)

- Start Date: January 2026
- Completion Date: February 2026
- Person(s) Responsible: Board of Trustees, Executive Director

- Arrange for facility inspections, renovations, and fire/building code compliance
  - Start Date: February 2026
  - Completion Date: April 2026
  - Person(s) Responsible: Board of Trustees, Executive Director

- Obtain Certificate of Occupancy and liability insurance
  - Start Date: February 2026
  - Completion Date: May 2026
  - Person(s) Responsible: Board of Trustees, Executive Director, Legal/Facilities Consultant

2. Hiring Personnel

- Finalize staffing plan & begin recruitment of teachers and support staff
  - Start Date: February 2026
  - Completion Date: March 2026
  - Person(s) Responsible: Board of Trustees/Executive Director

- Conduct interviews, hire core instructional staff, and begin background checks
  - Start Date: March 2026
  - Completion Date: April 2026
  - Person(s) Responsible: Board of Trustees/Executive Director, HR Consultant

- Provide teacher onboarding & professional development

- Start Date: April 2026
- Completion Date: July 2026
- Person(s) Responsible: Executive Director/Wildflower Foundation- educators participate in a 'school startup journey' and go through months of ongoing development towards becoming Teacher Leaders

3. Setting Up Organizational, Legal, and Financial Structures

- Establish legal and financial structures (501(c)(3) confirmation, EIN, bank accounts, fiscal policies)
    - Start Date: December 2025
    - Completion Date: February 2026
    - Person(s) Responsible: Board Treasurer, Legal and Financial Advisors
- Secure back-office financial service provider
    - Start Date: March 2026
    - Completion Date: April 2026
    - Person(s) Responsible: Board Treasurer, Finance Committee
- Develop and finalize fiscal policies & procedures
    - Start Date: March 2026
    - Completion Date: April 2026
    - Person(s) Responsible: Board Treasurer, Finance Committee

4. Securing Funding

- Secure funding sources (startup grants, fundraising efforts, etc.)
    - Start Date: January 2026
    - Completion Date: April 2026
    - Person(s) Responsible: Board of Trustees, Executive Director, Community Engagement Committee
- Monthly financial monitoring, compliance reporting, and operational refinement
    - Start Date: Ongoing from April 2026
    - Completion Date: Ongoing
    - Person(s) Responsible: Board Treasurer, Finance Committee, Executive Director

5. Selecting or Developing Critical Aspects of the School's Academic Program (Including the Curriculum)

- Develop and finalize curriculum materials & instructional framework
    - Start Date: May 2026
    - Completion Date: July 2026
    - Person(s) Responsible: Teacher Leaders/Executive Director
- Provide teacher onboarding & professional development (Montessori training, compliance, special education training)
    - Start Date: May 2026
    - Completion Date: July 2026
    - Person(s) Responsible: Executive Director/contracted professional development
- Set up classrooms, purchase and install Montessori materials, furniture, etc
    - Start Date: July 2026
    - Completion Date: August 2026
    - Person(s) Responsible: Board of Trustees, Teacher Leaders, Executive Director, Community partners and prospective family volunteers

Final Preparations for School Opening

- Ensure student recruitment goals are met, conduct final enrollment confirmations
    - Start Date: January 2026
    - Completion Date: July 2026
    - Person(s) Responsible: Executive Director and eventually once hired: Teacher Leaders
- Conduct family orientation sessions
    - Start Date: July 2026
    - Completion Date: August 2026
    - Person(s) Responsible: Community Engagement committee, Teacher Leaders, Executive Director
- Finalize health and safety procedures (including emergency response, medical services, and food services)
    - Start Date: May 2026

    - Completion Date: August 2026
    - Person(s) Responsible: Executive Director, Teacher Leaders

- Launch School (First Day of Instruction)

    - Start Date: September 2026
    - Person(s) Responsible: Board of trustees, Executive Director, Teacher Leaders

This timeline ensures that all key aspects—including securing a facility, hiring staff, establishing legal and financial structures, securing funding, and developing the academic program—are addressed in a structured manner leading up to the first day of school in September 2026.

R-23a - Supplemental Narrative

Clarification Regarding Admissions/Enrollment Policy Language in this RFP

In our initial submissions uploaded to epicenter, we referenced the use of set-asides for Students with Disabilities (SWDs) and Economically Disadvantaged (ED) students as part of our admissions approach. Upon further review, and with a more thorough understanding of New York State Education Law and SUNY CSI policy, we acknowledge that this terminology and approach were not applicable under the current legal and regulatory framework. As such, we have replaced mention of 'set asides' as it pertains to SWD's and ED, and replaced it with a weighted lottery system. We then replaced former entries containing this language with new entries on epicenter.

We understand that under Education Law § 2854(2)(b) and SUNY CSI policy, set-asides are only permitted for children of full-time employees of the education corporation or its Charter Management Organization (CMO), and only up to a maximum of 15% of available seats per grade. We recognize use of set-asides for federally defined at-risk subgroups, including SWDs and ED students, is not permissible and may conflict with the SUNY Institute's guidance as well as the U.S. Department of Education's Charter Schools Program (CSP) Non-Regulatory Guidance, which discourages the use of absolute preferences or set-asides outside of the staff/CMO exception. In response to this clarification, we have revised our admissions and lottery policy to reflect the appropriate use of a weighted lottery in full alignment with SUNY CSI standards and CSP federal guidance. Specifically, we now apply a single additional lottery entry for applicants who identify as either SWD or ED, with no compounded weights or guaranteed seats. We have ensured that all language regarding enrollment prioritization aligns with the SUNY Institute's requirements for a single, random lottery and supports equitable access to all applicants.

Still, we wanted to make note that to the best of our knowledge, all references to set-asides for at-risk groups have been removed from our final submission. Any residual use of the term "set-aside" exists only in early external communications, such as an email referenced to the local Mayor, which were retained in our record solely to reflect the original language used at the time of outreach. These instances are not indicative of our final policy position, nor will they be moving forward.

We sincerely appreciate the SUNY Charter Schools Institute's rigorous standards and guidance throughout this process. We remain fully committed to maintaining compliance with New York State law, SUNY CSI policy, and federal CSP requirements, and we are grateful for the opportunity to demonstrate our alignment with those expectations.

R-23b - Supplemental Attachments

This request is not applicable.