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## (Making) History



When Urban Montessori Charter School (UMCS) opened in the fall of 2012, we became Oakland's first public Montessori school, introducing a powerful, 21st-century-aligned model, committed to becoming a truly innovative and unique Transitional Kindergarten to 8<sup>th</sup> grade school option for Oakland (and neighboring cities') families. The Montessori model was designed in alignment with children's developmental stages, anticipating the era of education based in neuroscience and the pursuit of personalized learning models by over 100 years.

UMCS takes Montessori into the 21st century with a school model that rests on three foundational pillars:

- Montessori Curriculum and Pedagogy
- Design Thinking Process
- Arts Integration

Today, UMCS serves 320 students in grades TK-to-5 and regularly maintains a waitlist of nearly 100 children throughout the year. Last year, we received over 300 applications for a mere 90 openings. At full size, UMCS will serve a 700-student TK-to-8 student body that reflects the socioeconomic and racial diversity of Oakland. The large number of applicants and the size of our waitlist both highlight the enormous demand for our model and support our original vision to scale by opening other Urban Montessori school sites in the Bay Area and around the nation.

In November 2015, we were honored to be listed on the GettingSmart list of 65 model schools in the nation worth visiting<sup>1</sup>. In December 2015, **Edweek.org** included UMCS on its short list of schools providing innovative personalized learning options in the Bay Area<sup>2</sup>.

We take these as signs of great things to come considering we have only been open for three and a half years.

## Challenges: Why We Get Out of Bed

Maria Montessori never developed a formal middle school program and, unlike the other Montessori age levels, there is no international consensus defining Montessori secondary education. UMCS is poised to tackle this problem after **establishing a nationally-recognized Elementary program** in our first three years of existence.

Our model is a direct response to the pressures the internet and a global economy place on our children's future. When knowledge is a commodity, our schools must develop children who can identify their passions and apply knowledge to solving novel problems that matter to them and to their community. Writing in the New York Times, Thomas Friedman observed exactly this:

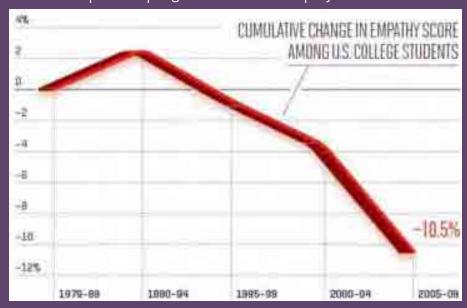
It will be vital to have more of the "right" education than less, that you will need to develop skills that are complementary to technology rather than ones that can be easily replaced by it and that we need everyone to be innovating new products and services to employ the people who are being liberated from routine work by automation and software. The winners won't just be those with more I.Q. It will also be those with more P.Q. (passion quotient) and C.Q. (curiosity quotient) to leverage all the new digital tools to not just find a job, but to invent one or reinvent one, and to not just learn but to relearn for a lifetime.<sup>3</sup>

Not surprisingly, it is not difficult to find specific data points to back up Friedman's views and UMCS's value proposition:

- As much as 47% of U.S. employment is at risk of disappearing due to the ability to use computers and/or robots to replace humans<sup>4</sup>
- The McKinsey Global Institute has identified an upward, ongoing trend in employment based upon human interaction; jobs in this category are growing faster than any others<sup>5</sup>

 The demand for empathy in the workplace is increasing while the supply of "empathetically competent" citizens and employees is decreasing<sup>6</sup>

In short, in an interconnected world and economy that increasingly demands that humans reinvent their ability to contribute constructively and meaningfully to society, empathy may be the single key that will unlock such a door. Our model concretely and demonstrably supports children in maintaining their natural love of learning by preserving student agency and then adds a well-defined process in Design Thinking and a rich tool set via Arts Integration to allow students to identify their passions and drive an idea from concept to implementation. The Middle School will put this progression on full display.



Our nation's capacity for empathy is cratering at time when career readiness and excellence most require it

<sup>&</sup>lt;sup>3</sup>Friedman, Thomas. "It's P.Q. and C.Q. as Much as I.Q.", New York Times, Jan. 29, 2013.

<sup>&</sup>lt;sup>4</sup>Frey, Carl Benedikt and Osborne, Michael A. "The Future of Employment: How Susceptible Are Jobs to Computerisation?", September, 2013.

<sup>&</sup>lt;sup>5</sup>Colvin, Geoff. "Humans are Underrated," Fortune, July 23, 2015.

<sup>&</sup>lt;sup>6</sup>Konrath, Sarah, O'Brien, Edward H. and Hsing, Courtney. "Changes in Dispositional Empathy in American College Students Over Time: A Meta-Analysis," Personality and Social Psychology Review (2010).

We envision a breakthrough middle school (Grades 7 and 8) grounded in Montessori's proven 100-year-old, studentcentered model; tailored to the academic needs of diverse, pre-adolescent and adolescent urban learners; and supercharged by 21st century technology.

Our foundational model is in place, so in building our Middle School, our goal is to carry over the work we already do in developing metacognitive skills like embracing diversity, teaching tolerance and empathy, cultivating global and environmental awareness, and practicing real-life skills. Our model grows by way of the children's connection with the larger community and outside world. Students participate in volunteer, internship, and entrepreneurial opportunities of their own design that explicitly teach the real-life skills of the workplace. Our success will serve as a national model for how to effectively integrate technology into Montessori's proven personalized learning pedagogy. And, in that Montessori is already personalized, we can leverage technology to enhance students' experience. We envision the capacity to amplify the world of each child by connecting them with other students and field professionals, as well as allow them access to materials and experiments that are currently inaccessible in our classroom environment.

The Middle School will illustrate the education environment we believe our students need in order to be happy, productive global citizens. It is an environment that:

- Preserves children's natural love of learning
- Respects their agency
- Nurtures their creative confidence
- Provides them with concrete tools to identify and solve novel problems they and their community face

# What futures do our students want from us? VSCN, next gen

## Our (hard)CORE Values Unite Us

We **founded** UMCS on the following values; these are not aspirational, but are **core to what it means to be a**Montessori school. We value:

- Creative Confidence
- Self-Agency
- Empathy
- Persistence
- Passion
- Innovation

As a community, we have reformulated the Stanford d.school's Design Thinking terminology to be more accessible to our students, teachers, and parents and to undergird our commitment to understanding and working across difference as global citizens. Together, we value:

- Noticing and Caring
- Working Together and Creating
- Sharing and Reflecting

All art in the Montessori classroom focuses on the process of making over the finished product. Our Studio Habits of Mind, drawn from Harvard's Project Zero Studio Thinking Framework, place equal emphasis on seven disposition-oriented habits of mind in addition to the more traditional habit of 'developing craft' (one's artistic skill). Thus, we value:

- Developing Craft
- Observing
- Stretching and Exploring
- Envisioning
- Expressing
- Engaging and Persisting
- Reflecting
- Understanding Art World

Each of these values has roots that trace back to our vision of developing students who can leverage their passions into meaningful and valuable contributions to their community, on any scale. And, in mapping to our vision, these values serve our core challenge to develop a breakthrough middle school.



Montessori, Design Thinking, and Arts Integration -- UMCS's three pedagogical pillars -- intertwine to deliver a powerful learnercentered student experience that has to be observed to be fully comprehended. Montessori's well-known reputation for preserving children's natural passion to learn by placing children at the center of their education is strengthened by the Design Thinking process that makes explicit what is implicit in Montessori pedagogy: how to translate a passion into a concrete contribution to one's community. Arts Integration is not only aligned to Montessori curriculum, but it teaches the arts as a tool for self-expression in service of solving problems that matter. All three come together to address the "empathy gap" noted earlier: children don't "just" believe they can change the world, they want to change it because day in and day out they see their passion solve someone else's problem.



Montessori: All lessons are linked to state standards and allow for multiple entry-points for follow-up work to meet each child at her/ his level.

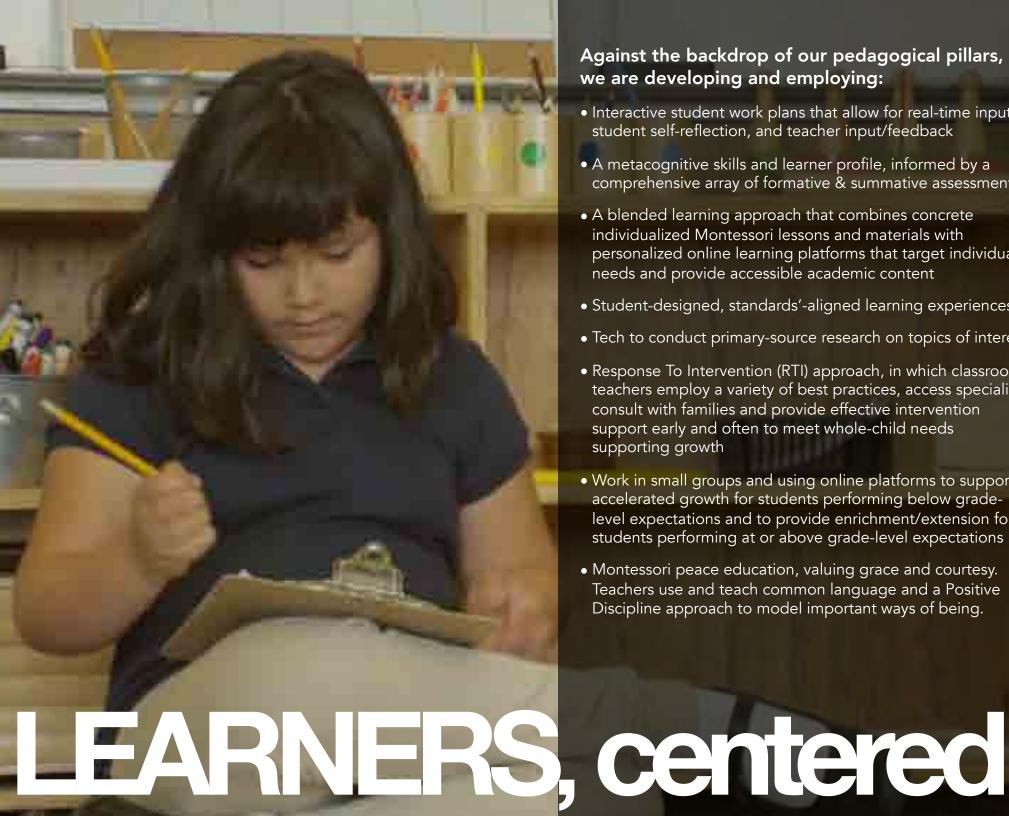


Design Thinking (DT): UMCS Middle School students will have used DT for a minimum of four years when they enter 7th Grade. Students will be competent in identifying important problems that matter, working collaboratively to develop prototype solutions, iterating solutions based upon real world testing and feedback and sharing their solutions with key community stakeholders and users. In the Middle School, this practice will increasingly extend into the larger Oakland and California community.



**Arts Integration**: There are strong parallels between the work we do to integrate the arts within our curriculum and the skills gained through Montessori. Risk-taking, creative problem-solving, and authentic expression are at the heart of this work. Art is also used to deepen student engagement, hook multiple types of learners, and expose students to different cultural values and beliefs. While students are taught fine-art skills, the focus is more on their own expression, articulation, and artistic literacy.

# LEARNERS, centered,



#### Against the backdrop of our pedagogical pillars, we are developing and employing:

- Interactive student work plans that allow for real-time input, student self-reflection, and teacher input/feedback
- A metacognitive skills and learner profile, informed by a comprehensive array of formative & summative assessments
- A blended learning approach that combines concrete individualized Montessori lessons and materials with personalized online learning platforms that target individual needs and provide accessible academic content
- Student-designed, standards'-aligned learning experiences
- Tech to conduct primary-source research on topics of interest
- Response To Intervention (RTI) approach, in which classroom teachers employ a variety of best practices, access specialists, consult with families and provide effective intervention support early and often to meet whole-child needs supporting growth
- Work in small groups and using online platforms to support accelerated growth for students performing below gradelevel expectations and to provide enrichment/extension for students performing at or above grade-level expectations
- Montessori peace education, valuing grace and courtesy. Teachers use and teach common language and a Positive Discipline approach to model important ways of being.

Though there is still a significant lack of clarity regarding the definition of what "college and career ready" means across the nation<sup>7</sup>, UMCS has a very simple definition that transcends policy and prizes real-world results. College and Career Readiness is the belief that one can change the world knowing one has the skills to do it. Without that unshakeable belief in their ability to drive change, our children will grow up impacted by the world instead of impacting the world themselves. No college degree or pay check can ever stand in for passion, curiosity, and persistence. As should be crystal clear by now, from the moment a child enters UMCS, our model's entire focus is to place that child at the center of his or her education so that s/he immediately experiences the joy that comes from doing something you love for people you care about. The metacognitive skills of collaboration, perseverance, critical thinking, empathy, problem solving, and risktaking that students practice and acquire at UMCS will set them up for success in high school, college, and career.

One would think this kind of training begins at the Middle School level, but it actually begins at the age of 4, when a child first walks through our doors. The teaching and practice of real-life skills, called "practical life" in Montessori, is an integral part of a student's work at school. The aim of practical life is to offer the child, at an early age, skills that foster independence, concentration, creativity, and the idea that they are a contributing member of society.



And, these skills are EXACTLY the skills that leaders at some of the most innovative companies in the world are increasingly and actively seeking at a time when knowledge is a commodity but innovation is not. Laszlo Bock, the former Head of People Operations at Google, wrote in his 2015 book Work Rules: Insights from Inside Google That Will Transform How You Live and Lead that Google prefers "clever and curious to someone who actually knew what he was doing."8 As the Wall Street Journal observed in reviewing Mr. Bock's book, "the resumé is dying. . .the traditional way of attracting job seekers—post a job, screen résumés, interview, hire—isn't going to get you the best candidates."9 The implications for our students is that college and career readiness must reflect changing employment practices and the UMCS Middle School is designed to support that very requirement, regardless of how the child might someday choose to contribute to society.

#### As such, we ensure:

- Overarching emphasis on metacognitive skill development directly aligns to increasing value placed on these skills by colleges and employers
- Robust academics in core subjects that prepare all students for college and career readiness
- Student-identified and -driven internships provide exposure to wide-ranging career paths
- Support services meet individual needs via counseling, academic intervention and guidance

<sup>&</sup>lt;sup>7</sup>Freedburg, Louis. "Teachers Say Critical Thinking Key to College and Career Readiness," http://edsource.org/2015/teachers-say-critical-thinking-most-important-indicator-of-student-success/87810 September 29, 2015.

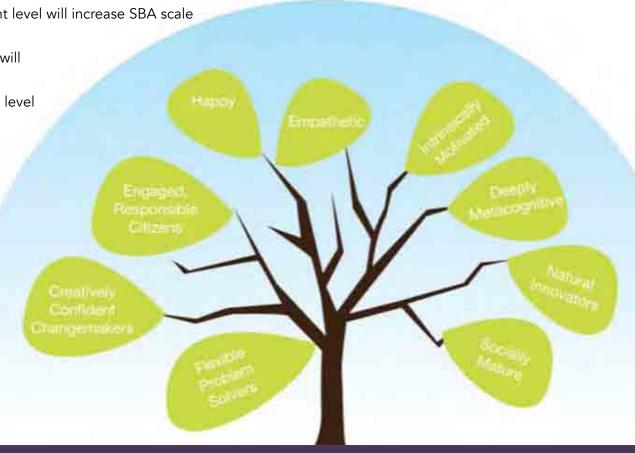
<sup>&</sup>lt;sup>8</sup>Bock, Laszlo. Work Rules: Insights from Inside Google That Will Transform How You Live and Lead, Twelve, 2015. <sup>9</sup>Freedman, Daniel. "Silicon Valley Star Search," Wall Street Journal, April 6, 2015.

For all intents and purposes, we have been prototyping our Middle School outcomes and measures by developing our Primary, Lower and Upper Elementary Programs. We have implemented the basic systems necessary to measure the short- and long-term success indicators below, and we have been measuring all of them for a minimum of one and a maximum of three years. Our children will enter the Middle School with a performance baseline and a range of demonstrated success with the strategies upon which we are building the Middle School. As a result, we have significantly de-risked the question of whether or not our strategies will be successful so that we can focus on how to optimize them for student success using these increasingly sophisticated and breakthrough success indicators.

#### **Success Indicators for Middle School**

- Increase percentage of students that meet proficiency on CAASPP (SBA) summative assessment (Mathematics) by 10% per annum
- Increase percentage of students that meet proficiency on CAASPP (SBA) summative assessment (English Language Arts) by 10% per annum
- Annual student growth targets on annual summative standardized state testing (SBA ELA & Math):
  - Students scoring in "Standard Not Met" achievement level will increase SBA scale score by 50 points
  - Students scoring in "Standard Nearly Met" achievement level will increase SBA scale score by 40 points
  - Students scoring in "Standard Met" achievement level will increase SBA scale score by 30 points
  - Students scoring in "Standard Exceeded" achievement level will maintain college and career readiness
- 80% of students meet or exceed annual Math and ELA growth targets (benchmark assessments, including NWEA; students participate each academic term)
- 90% of students meet or exceed weekly learning targets (SMART goals set in consultation with the teacher, recorded and tracked on the work plan)

It is essential to understand that **UMCS expects to develop happy, life-long learners**. We are not aware of any assessment tools that exist yet to take such a measurement; the illustration at right reflects how we would expect to describe every single graduate of the UMCS Middle School program.



## OUT COMES SUCCESS

In 2018-2019, with our Middle School built out and our learner-centered strategies of Montessori curriculum and pedagogy, Design Thinking Process and Arts Integration fully realized, we envision the following **day in the life** of a Middle Schooler who has been at UMCS since 2nd grade:

As is our custom, we welcome each child at the door with a handshake and a smile. When 12-year-old Janira arrives, we connect with her so that her day begins positively. She enters the room and immediately joins her classmates who have already eagerly begun silent reading, diving into a variety of texts across genres. Her teachers regularly bring her new books they know will interest her. She knows that if she reads in a focused way during this time, she can help take attendance, which provides her with positive reinforcement for appropriate actions.

After 25-to-30 minutes of silent reading, Janira facilitates the class meeting in the daily morning circle. She is a natural leader adept at addressing her peers, having practiced these skills for the last six years at UMCS. During the class meeting, students discuss a range of issues, including thoughts on **their current design challenge to increase the yield of the school's vegetable garden to meet the needs of a local food bank**, reflections on a recent increase in theft in some of the students' neighborhoods, and discussions on the waning shark populations in the Pacific Ocean.

Janira dismisses the students from the morning circle and turns to the work plan that she created on her Chromebook. It is integrated with the Illuminate Student Information System to track her work plan progress trends and subject matter coverage. For the next three hours, Janira will engage in Montessori's customary focused morning work period. As it is Friday, the first thing to do is attend a Skype meeting with peers in Jersey City, NJ who share Janira's passion for using photography to tell the story of what it is like to live in a diverse city. **The students are working on a project they will pitch to museums and galleries in the Bay Area and New York** that depicts a day in the life of Middle Schoolers in the cities as a compare-and-contrast exercise of what these experiences are for students living on opposite coasts.

After the morning work-period concludes, Janira and 15 other middle school students head to the garden to harvest vegetables and eggs that will be part of the lunch they prepare for their classmates. Every week a different group rotates through lunch prep and service as part of building practical life skills and a greater sense of school community. The week before their shift, Janira and her peers budgeted for, selected recipes and placed orders with local vendors to ensure that they had everything required to serve lunch to their peers. At week's end, Janira and her team will be responsible for presenting financials -- revenues and costs for the week's lunch -- to school administration.

In the afternoon, students attend cultural lessons based on their interests, standards, and their personal work plan. Janira's focus this year in Science is Ecology. She participates in an internship with Friends of Sausal Creek, which regularly takes her out of the classroom and into the field. Her specific focus is on watershed health and restoration. Today, **she participates** in a Google Expedition, following a field biologist online through her restoration work. She then spends time researching how that work pertains to the vegetation and local waterways.

After the formal school day ends, Janira turns to her interest in U.S. Government as a participant in the Debate Club. She has been organizing a mock debate on gun control that grew out of her Congresswoman's invitation to Washington, D.C. Upon learning about Janira's photography project, the Congresswoman invited Janira and her peers to visit Washington to discuss teens' perspectives and experiences with gun violence in Oakland. As the day draws to an end, **Janira stops to reflect on how connected her schooling feels to the things she really cares about and how certain she is that she can be a changemaker in her community**.

# THE FUTURE, perfect

## Launch Year: Student Agency

In order to have a robust Montessori Middle School program up and running in three years, we will begin the process of building out our model during the 2016-17 school year. Visitors to our school can expect to see many of the learner-centered strategies that will characterize our Middle School already in place next year.

#### STUDENT AGENCY

Montessori prizes student agency. Because UMCS does not typically accept new students into the school beyond third grade, our middle school students will have been at UMCS for a minimum of five years and will therefore expect to own their learning by the time they are in middle school. This fundamentally differentiates our model: we're not bolting student agency onto a model that was not designed for student agency from the outset; rather, student agency has been at UMCS's core since we opened in 2012.

UMCS students generate their own work plans that guide their choices and responsibilities throughout the week. Lessons are presented in an individual or small-group format that introduces a topic or initiates a discussion. Students then complete follow-up work to hone their skills until they demonstrate competency. In the multi-age classrooms<sup>10</sup>, students learn not only from their teachers, but also from each other, giving lessons or practicing skills when requested or when they see a need. Students advance and content becomes layered when they show proficiency. Students are also involved in long-term planning and self-assessment, building metacognition of their unique learning style and school experience. Beginning in Fourth Grade, students present during family conferences, sharing with their families and caregivers what they've accomplished and where they need to improve. Throughout the middle school years, their ability to self-evaluate heightens and becomes more formalized.

At the beginning of their Seventh Grade year, students will take their data and work plans from the previous year and create an outline and learning objectives for the coming school year. Data includes their NWEA assessments, competencies from the previous year that need to be strengthened, and their work plans, revealing patterns of work choice and follow through. Students practice day-to-day work alongside long-term projects to cultivate time management skills and build metacognition. Teachers and students set weekly expectations together and then students are given the responsibility for managing their time to meet those expectations. Students use long-term objectives to reverse engineer how to spend their time most effectively in the short-term.

UMCS students choose curricular extensions that inspire them, with teachers helping to align projects to standards and learning outcomes. The following is a real example from our Upper Elementary program that illustrates how we support student agency:

Students wanted to fundraise for curriculum and P.E. equipment and noticed that unopened potato and tortilla chips students didn't eat at lunch could be sold at the pickup line. Teachers assisted with problem solving the logistics and drawing out what students gleaned from the process, including but not limited to the mathematics involved in ordering, selling, and maintaining inventory, handling sales and the public, and planning and writing the proposal.

This is just one example of how, after multiple years of exposure to Design Thinking, our students are well-versed in the process and how it has become interwoven with the way they identify and solve problems.

<sup>10</sup>In Year One, the Middle School will include 7th grade students only -- those children who rise up to 7th grade from 6th grade. In Year Two, the Middle School will include both 7th and 8th grade students as rising 6th grade students will become 7th grade students and rising 7th grade students will become 8th grade students. As a result, the Middle School will not have multi-age classes until Year Two. To compensate for the lack of a multi-age experience in Year One, 7th grade students will be actively engaged in other UMCS classrooms as leaders and teachers.

### Student Agency/Data & Assessment

The Middle School will scale student agency and entrepreneurship. Our elementary students feel empowered, capable, and validated exploring interesting content, and in Middle School they will have more opportunities through regular access to internships and out-of-school experiences that provide larger opportunities for students to experience their ability to positively impact their community. Weekly visits to the Sausal Creek watershed, San Francisco Bay, Phat Beets, and City Slickers farms will offer opportunities to meet their physical needs, while providing volunteer and community service opportunities.

#### **DATA & ASSESSMENT**

Montessori teachers continually assess cognitive, metacognitive, social, and emotional development through observation of each child in the Prepared Environment<sup>11</sup>, noticing how each child interacts with the materials, with peers and with lessons. These observational data are complemented by robust formative assessments, which provide teachers and students alike with data on academic performance, including NWEA growth data, metacognitive skills data, time on task, and evidence of empathy through hours of community service and reflection.

#### Students demonstrate mastery in a variety of ways.

After lessons, students progress through increasingly complex follow-up work, culminating in a task that inherently requires mastery. As we implement Illuminate's DnA, we will develop a series of standards-aligned performance tasks so that students can demonstrate mastery (or not) in another modality. Rather than complete multiple choice tests, students show competence through an inquiry-based project that engages the child in problem solving. The student may be asked to propose a solution that resolves conflict between two peers, generate funds for a field trip or outing, or design, build, plant, maintain, and harvest a garden bed to be used to supplement school snack.

On a weekly basis, students confer in-depth with peers and teachers regarding academic work completed, long-term goal progress, successes, challenges, and future goal-setting. **Students are expected to reach their weekly goals 100% of the time.** By taking into account lessons (student-requested, teacher-initiated, and student-given), follow-up-work completed, use of resources, community engagement, and also self- and teacher-assessment of how each student utilized their learning time, students develop their ability to set and attain appropriate goals over time and hold themselves accountable, with the support of their teachers.

On a trimesterly basis, all students participate in benchmark assessments in reading, writing, and math. Teachers and academic support staff monitor performance and growth data each term. Students performing below expectations have accelerated growth goals, which are supported by a school-wide tiered intervention support system. Regular, on-going meetings with teachers help guide and solidify this plan as well as build metacognition in regard to their learning. Students demonstrate competence with the classroom materials and are then challenged to apply their learning in a different modality, thereby demonstrating mastery. Students and teachers meet regularly around this data to set their short- and long-term goals.

"Education technology grabs all of the headlines, but Montessori education is still one of the most complete examples of personalized learning."

-Alex Hernandez, Partner, Charter School Growth Fund

## Walk With Us on Our College & Career Path

#### **CORE CURRICULA, CONTENT & PATHWAYS**

Effectively and figuratively, every Montessori student has an Individualized Education Program (IEP). In the context of this application, we might replace "Program" with "Pathway"<sup>12</sup>.

Montessori core academic subjects are math, language arts, geometry, history, botany, zoology, physics, chemistry, ecology, and geography. Each year, content spirals upward in depth and complexity. Tangible materials and inspiring stories introduce concepts concretely and activate curiosity. Children manipulate materials based on interest, need, and teacher recommendation, solidifying each concept in sequence. Students also participate in physical education, art, music, and outdoor education. As indicated elsewhere, all subjects are interwoven and come to life via each child's specific work plan, which provides a concrete path forward toward meeting yearly learning goals.

Additionally, metacognitive skills development is an explicit aspect of students' learning path. While this has been embedded in Montessori since its inception a century ago through the Peace Curriculum, we have added to our metacognitive skills development arsenal by adopting Positive Discipline, Mindfulness, Honoring the Light of the Child, and the Toolbox Project tools. We are very intentional about our metacognitive skills development as, increasingly, research is finding that metacognitive skills are as important, if not more important, than subject matter expertise to college and career-readiness. 13, 14 We focus weekly on social and emotional learning, teaching or practicing skills and strategies students can use to grow their metacognitive skills.

Integration is at the heart of the Montessori pedagogy and our Middle School program. In lieu of textbooks, students learn at an early age how to access relevant material from an array of sources: books, magazines, videos, personal interviews, Montessori command cards, and online resources (including, but not limited to Newsela, Kidrex, Kidsclick, and Google Cultural Institute). When discovering a topic, students have the opportunity to easily integrate content areas through a project-based learning approach. They may be working on an assignment focusing on U.S. History which integrates digital citizenship, interviewing primary sources, essay composition, statistics, regional topography, art, weather patterns, natural resources, and traditional local

local food. Because the projects are multi-faceted and hold meaning for the child, the work is legitimized, done with intention, and memorable.

Our ongoing work with Design Thinking enables children to continually develop their empathic tendencies towards fellow community members, further rooting them in the culture, economy, and thought of the 21st century. Students not only become more adept at solving problems, but also use this innovation process, grounded in human needs, to look for and identify problems around them.

The Design Thinking mindset also stresses the bias towards action necessary in nurturing the designers, engineers, and entrepreneurs of the future, while concurrently providing a useful framework for better self-regulation within students' personal lives. Completed UMCS Design Thinking Challenges include creating necessary, functional classroom furniture, drafting classroom constitutions, and crafting a unique utensil to aid fellow students in consuming favorite meals.

Through creating and participating in arts-integrated projects, students recognize the interconnectedness of curriculum and how to approach content in a multi-faceted way. The arts integration is two-fold. For any given assignment, students are welcome to create follow-up work to a particular lesson in whatever way best expresses their learning: PowerPoint, diorama, play, essay, model, song, diagram, etc. This allows students to assimilate the information in a meaningful way, while accommodating or accentuating their learning style and the way they coalesce skills. It is also approached when teachers from two content areas meet to design larger projects that intentionally fuse art, music, design, dance, photography, or literature, with math, the sciences, or social studies. These are typically larger projects, like the example photography project in the Day in the Life section.

Middle School students will conduct research that will inform the next stage of their learning path. Students will research and apply to high school programs that meet their specific learning goals, styles, and learning focus.

# Not Joyful? Not Personalized.



#### **INSTRUCTIONAL DELIVERY**

Visitors to our school make a powerful observation not often included in the personalization discussion: true personalization means students are happy and engaged. Q&A sessions with visitors tend toward this question: "How do you give students SO much control of their learning and how have you made them so happy?"

The answer is in the question. Dr. Montessori's curriculum meets children where they are and moves them forward at an appropriate pace. **The whole child is considered when designing a motivating academic plan.** They have ownership, and therefore engagement, in planning and initiating their day, week, and year. Students regularly conference with teachers regarding their work and effort, and self-assess in content areas. These practices build metacognition of their learning and promote analytic skills.

Montessori is fundamentally a personalized learning model. Alex Hernandez, writing in early 2015 for Edsurge.com, called attention to this fact when he rightly observed that "education technology grabs all the headlines, but Montessori education is still one of the most complete examples of personalized learning." During the planning phase, we've been honored to host visits with a range of schools on the personalized learning model spectrum. Visitors' feedback is consistent: they recognize that truly personalized learning can only be attained when personalization is the focal point of each decision. At UMCS, personalization isn't something that happens only sometimes -- it describes our entire approach because Montessori was designed and is practiced with students in the center and adults on the side.

That being said, teachers routinely evaluate the classroom environment, their own approach, and observational data to ensure each child's needs are met and that they are growing academically. Some lessons are given weekly for practice skill-building or to expose children to new content, while some lessons are presented only once a child shows a particular level of mastery. Each child may receive a lesson on commas in the same week, but the lessons layer with complexity as is appropriate for a particular student or small group. In essence, they are tailored to enhance individual or small group accessibility. Teachers support students in metacognition/self-reflection, setting goals in multiple areas. Goals address growth areas which might be building a strength or supporting an area of difficulty. If a child requires more support, we meet with families to develop and then use targeted interventions in eight-week increments to monitor student progress. Interventions include in-classroom best practices and/or accessing specialists' support for intensive intervention. Students receiving intervention have monthly growth goals the specialist measures in collaboration with the classroom team. Intervention teams meet at least monthly to review progress, strategies, and set/adjust goals.

Students also have access to services such as special reading groups, occupational therapy, and speech and language. Teachers continue interventions resulting in measurable growth. When growth does not result, teachers request support from the Care Team, a group of teachers and specialists who convene to gather information, identify needs, set goals, and determine action. Students continue to receive support under the guidance of the Care Team until the child demonstrates growth or qualifies for Special Education services.

# SPACING OUT

All students will be grouped into one learning pod, consisting of the entire cohort of about 100 students and a team of five educators who act as both facilitators and teachers all working together. The pod will function best in a large space consisting of learning nooks with materials for each content area as well as common spaces that allow students to organize as individuals or in self-assigned or teacher-assigned groups as needed.

# INSIDE SPACES

- Student-accessible storage of content materials
- Small group instruction space
- Collaborative work spaces with movable furniture
- Individual work spaces
- Tech storage and checkout, holding Chromebooks, headphones, mice, document and digital cameras, Google Cardboard, tablets, scanners, Arduino software and motor kits, and 3D printers

### OUTSIDE SPACES

- Off-campus locations for off-site learning
- The Garden: Students plan for efficient use of garden plots by researching, planning and planting seasonal companion crops
- Workshop/Maker Space: Student learning can take students outside of the classroom as they build computers, work on bikes, repair issues within their physical environment or design, repair and invent new devices
- Art Studio: Students interested in the visual arts have a place to study art and artists and draw, paint, design and sculpt their ideas into reality
- Music Room: Students practice their studied instrument alone or in ensembles, as well as practice writing and recording music
- **Photo Lab**: Students deepen/demonstrate knowledge and expression via photography
- Science Lab: Modern facility promotes practice in core sciences
- Stage: Supports theatrical disciplines as well as free expression
- The World: "Going Out"s and internships take learning into the local and extended community

## Schedule & Staffing

#### **SCHEDULE**

Every day in a Montessori classroom is designed to flexibly meet students' needs. Students play a central role in planning their year, months, weeks and days, reflecting both in-class and outside-of-the-classroom work.

Middle School students will continue to participate in the traditional Montessori morning, beginning with a student-facilitated class meeting on current events, followed by an uninterrupted, three-hour (180 minute) work period focused on lessons, follow-up work, and including interventions. During the work period, students prepare and then are guided by their work plan -- that is, they structure their learning time.

They designate and prioritize focus for the day and week. They engage in individual or small group lessons, Readers and Writers Workshop, plan for or participate in specific projects, maintain their internship requirements, act as reading buddies or aides in Kindergarten and Lower Elementary classrooms, and conference with their teacher or peers. As is the case schoolwide, students take care of their physical needs (snack and bathroom breaks) as necessary and move throughout the learning spaces to accommodate different tasks.

In the afternoon, there is also a flex work time with lessons emphasizing Science, History, Social Studies, Design Thinking and Art, which then get integrated into the morning work period initiatives. Students rotate through varying spaces, work with different teachers, and experience both discussion- and activity-based sessions. For example, a student may work outside in the garden designing the next steps for her shelf building project, but then head to the Maker workshop to select, measure, and cut wood before History begins.

#### **STAFFING**

The Montessori staffing model is designed to ensure children learn to develop the metacognitive skills required to direct their own learning for the rest of their lives. Also, it is critical to recognize that, as is the case for 1st-to-3rd grades and 4th-to-6th grades, **children will work with the same teachers for 7th and 8th grades.** Among many other benefits, this enables both students and teachers to settle back into school routines much faster after the summer break than is the case for teachers and students who need to establish new relationships at the start of each school year.

Each individual child will have an **Advisor/Supervising Teacher** who conferences, reviews and reflects, sets and monitors growth goals, supports assimilating discrete work in different content areas, and plans for high school transition with the child.

Unlike the Elementary School, the Middle School will employ **subject-specific teachers** in ELA, Math/Geometry, History/Geography, and Science.

Specifically for the Middle School (serving ~50 7th graders and ~50 8th graders), we will create the **Middle School Coordinator** role (a single teacher to coordinate all Middle School teachers' efforts) and the **Middle School Student Life Coordinator** (charged with developing and supporting Middle School students activities) and the Internship Coordinator role (supporting partnerships and tracking service aligned to academic plans and portfolios).



#### PROFESSIONAL DEVELOPMENT

At UMCS, we recognize the importance of teacher collaboration and voice. We preserve time weekly so that teachers can meet to plan and share observations. Every other week, teachers meet as a level to connect and discuss high priority topics. Teachers host a meeting monthly to share best practices and present Montessori instructional methods and best practices. This provides a thread of continuity throughout the different classroom levels. In the Middle School, teachers will also meet as advisors to share concerns, connect resources, and ensure continuity throughout the student body. On the opposite weeks, we meet as whole staff to aid in transparency of school business, team build, and strengthen solidarity.

Teachers receive and provide robust support in order to continually improve practice. Seasoned teachers coach our novice teachers through the process of clearing state credentials. This onsite coach allows us to specialize our support for advancing teachers within our unique learning environment. Additionally a veteran Montessori educator mentors our beginning Montessori teachers by frequently observing the classroom and providing ongoing feedback, guidance and support. A literacy coach and numeracy coach also provide support to the instructional staff by observation/feedback, providing resources, delivering PD and supporting implementation of curricula. A Lead Teacher at each level (Primary, Lower Elementary, Upper Elementary, and Middle School) also acts as a teacher leader, serving as Program Coordinator who is facilitates effective two-way communication between school administration and the instructional staff.

Middle School teachers will receive ongoing Montessori professional development by way of American Montessori Society (AMS) webinars, the AMS annual conference, attendance and participation in the Montessori (un)Conference, and collaboration with colleagues. Teachers will continue to develop their work in Mindful Schools Curriculum, Positive Discipline, and Toolbox. Teachers will attend local workshops and symposia related to cultivating internships, Model UN, creating community partnerships, ecological reciprocity, outdoor education, teambuilding, digital citizenship, and STEAM. We will continue to build our partnerships with Montessori For Social Justice, the Center for Critical Environmental and Global Literacy, and Educate 78. Our Arts Integration and Design Thinking leadership committees meet bi-weekly to develop, support, and organize specific work being done in each area.

As an urban public school, we are committed to providing equitable education for all students. This effort requires teachers and administrators to continue the work we have started to unpack personal bias and better understand how to teach within a social justice framework within a diverse school community. In our opening year, Ashoka recognized UMCS as a Changemaker school -- making UMCS the first public Montessori school to gain such recognition. As a result, we are held to high standards in terms of challenging assumptions, teaching empathy, peace, and making positive change. In addition, teachers will continue to participate in training that assists them in working with children with special needs as well as those who have experienced trauma. As mentioned above, we have a strong Response to Intervention to quickly identify students that need additional support. We have a Care committee that includes our SPED team, parents, teachers, and administration to create plans that best support individual students and get them the support they need.

Our teachers operate in a data-rich environment, relying both on observational data and embedded authentic assessment that is the core of Montessori practice as well as formal and informal assessment measures. These data inform the thousands of instructional decisions educators make each day. In addition, four times per year, following each term's benchmark assessments, we convene data summits to dive more deeply into patterns and trends and to focus on class-level data. Teachers participate in trainings to add to our toolbox of available interventions to support students either not meeting term growth targets or achieving below grade-level expectations (or both). Following each data summit, a day is dedicated to each level to analyze data and collaborate to determine actions steps for each student at every level; all educators who work with a student are present.

Middle School, as we continue to add one grade per year. Our plan reflects staff growth, too, as their proficiency in our model increases with continued planning and support. **Outputs, by School Year** 2018-19 2017-18 **Priorities** 2016-17 First year of Middle School (MS) Program First year of full Upper Elementary (UE) First year of full Middle School Program (Grades 4-6) Program (Grades 7-8) (Grade 7) • Iterate upon & implement electronic work • Iterate upon electronic work plan and • Iterate upon electronic work plan Metacognitive plans (student- & teacher-created, Common implement across UE (piloted 2017-18) and implement **Skills** • Create and implement Middle School work Core and Montessori Standards aligned. across MS piloted '15-'16) across UE plans that include internship / service learning Full implementation of linked work · Create & pilot linked work plans, portfolios, plans, portfolios, teacher records, tracking teacher records, and electronic gradebook and electronic gradebook feature • Full implementation of linked work plans, feature (Illuminate), for record-keeping & portfolios, teacher records, and electronic across UE and MS parent communication across UE gradebook feature for record-keeping across Implement self-assessment and Develop and pilot UE self-assessment and feedback tool within weekly work UE & MS Implement self-assessment and feedback tool feedback tool within electronic work plans to plans, which inform weekly studentinform weekly student-teacher conferences within electronic work plans, to inform weekly teacher conferences and planning and planning student-teacher conferences and planning • UE students use GAFE (Google Apps for • UE and MS students use GAFE platforms to Robust, Core Student portfolios utilized across Education) platforms to access core/ access core and supplemental academic MS, focused on demonstration of **Academics** supplemental academic content, including mastery of academic and content Afternoon Camp and Summer Learning • Launch student portfolios in Middle School extracurricular subjects, prior to • Provide multi-age learning experience for MS Programs graduation • Pilot student portfolios in Google Drive students (in absence of G8) • Pilot hands-on, experiential, interdisciplinary Montessori learning experiences (making, agriculture, and other entrepreneurial pursuits) Staff & students propose "Going Out" policy Student- Internship coordinator secures local/ national/ Internship coordinator secures local/ and procedures, research potential local international (virtual) internship partnerships national/international (virtual) Driven partners, and lay foundation for • First MS cohort pilot Spring trimester internship partnerships for full MS **Internships** partnerships, supported by Internship internships with identified partners and MS students secure Winter & Coordinator organizations Spring trimester internships with identified partners and organizations • Continue refining early interventions model • Present MS RTI Strategy at national Grow RTI leadership capacity to support **Support** • Increase RTI staff, including student support nascent MS program Montessori conference **Services** • Add .5 FTE Student Life Coordinator assistant and resource teacher services • Implement joint Student Life • Research & plan for MS extracurricular • Pilot clubs, sports teams, advisories, HS & Coordinator & MS student services college exploration recommendations for program needs iteration

Over the course of three years, we will implement our learner-centered strategies in stages that align with the growth of the

### There are three key barriers that we will focus on overcoming to realize our breakthrough vision:

**1. Facilities**: Our model requires larger-than-normal classrooms (national Montessori leadership organizations recommend 30-to-40 sq. ft/child) with configurable spaces to support the dynamic, design-driven, and student-centric work the Middle School program demands.

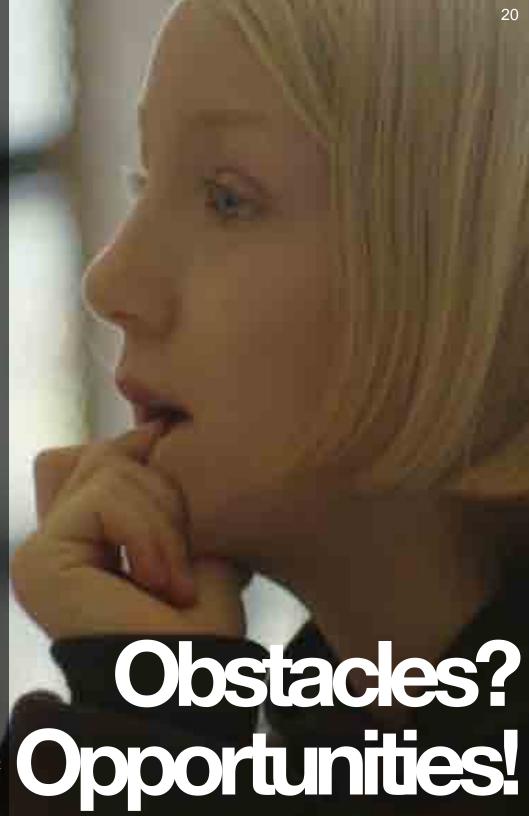
Prospective Solution: We are currently working directly with the Oakland Unified School District to meet our short-term and long-term facilities needs. We are exploring the option for a new site that would accommodate our growth to 8th grade (full Middle School program). We are also exploring options that would allow us to remain on our current site by adding both portable and flexible space capacity. A split campus option is also a possibility if the sites (separate Middle School) are in close proximity to each other.

**2. Talent Pipeline**: UMCS has historically faced greater-than-average difficulty in finding qualified Montessori instructors who also have a California Clear Credential and who have experience working with diverse urban youth and families.

**Prospective Solution**: To date, we overcome this challenge by supporting our teachers and Afternoon Camp staff in obtaining the appropriate Montessori training and/or the classes required to obtain a CA Clear Credential. We will continue to fund this support. And, as our school continues to gain national attention, we are increasingly finding that prospective teachers are reaching out to us from across the United States, as well.

**3. Fundraising**: Our model is more expensive than traditional models.

**Prospective Solution**: To date, we have averaged \$250,000 in our fundraising line item. Our model has not yet reached economic scalability, but it will in Year Two of our Middle School. At that time, costs should begin stabilizing while total per pupil revenues drive more dollars than any previous year due to maximum TK-8 enrollment. Additionally, we exceed our authorizer's 3% Operating Income reserve target, maintaining an adequate reserve, which allows us to smooth out any unexpected fundraising shortfalls.





# We're very engaging

In a such a diverse school, we are constantly reminded of and mindful of how essential stakeholder engagement is to the success of any changemaking initiative. We have been including our community in updates around our Middle School planning work and continue to do so.

Here are the concrete channels we use to ensure engagement:

#### **WEEKLY**

- NGLC Blueprint development updates are included in school emails
- Friday Community Coffee Mixers

#### **MONTHLY**

- UMCS staff meets twice monthly; NGLC activities and updates are included in these meeting agendas
- Monthly Family Advisory Council Meetings (1-3 family representatives from each classroom meet with the Head of School to discuss pressing issues)
- Monthly Board of Directors Meetings
- During this year's recruitment season, we continue to share NGLC updates that focus on innovative pilots that were implemented during the planning grant

#### **OTHER**

- Annual Authorizer Meetings
- NGLC Showcase
- Final Blueprint Publication

# Appendices

Urban Montessori Charter School's mission is to develop self-directed and engaged learners who are academically, socially and emotionally prepared to succeed in any high school. Nurturing the innovators of tomorrow to creatively meet the challenges of today's world with confidence, compassion and grace, Urban Montessori cultivates individual curiosities and strengths, while holding children to a high standard of excellence. At Urban Montessori, children deepen their understanding of what it means to live responsibly in a diverse urban community.

# Mission



David Castillo

Head of School/Parent

State-wide Charter Leader

& Technologist



Nathan Kendall
Teacher
Montessori Middle School
Expert



**Taima Beyah**Ops. Director/Parent

Deep operations, HR & advocacy experience



Jen Heeter
Founding Teacher/Parent
Instructional Leader w/
Montessori & CA
credentials



Michael Stollman

Academic Programs

Coordinator/Parent

Pedagogy expert



Randy Weiner
Co-Founder/Fmr. Board
Chair/Parent
Soc. entrepreneur &
former OUSD teacher



## Montessori excels in the capture and application of formative assessment data. Sources we use today and others that we will be introducing next year include:

- NWEA Performance and Growth Targets
- Student-designed, -driven and completed/incomplete work plans
- Uninterrupted, deep engagement in work during three-hour morning work period, measured through understanding of topics presented and integration into student work throughout the curriculum, as well as time on task, monitored through online accountability system
- Student-created, organized, and maintained work using an online portfolio management system
- Student metacognition capacity data, as collected via student/teacher conferences, extant tools such as The Hope Survey and The Survey of Academic Youth Outcomes
- Student ability to mediate conflicts with peers by utilizing resolution strategies, internalization and use of Toolbox SEL tools as measured by yoop.ly behavior management system data
- Documentation and analysis of unexpected behavior (choices that significantly affect learning for at least one student)
- Evidence of student use of empathy to identify meaningful problems/opportunities in the school, neighborhood or city community (a concrete example of such evidence will be student-designed community service projects that donate a minimum of 30 hours service; projects will utilize Design Thinking to create and implement their project idea)
- Implementation of Design Thinking, leading to a minimum of one project per year that delivers measurable change in the intended community
- The completion and presentation of projects incorporating an interdisciplinary approach to learning interweaving one or more foci or discipline in art (theater, dance, fine art, music, photography) with curricular content from other areas (science, math, history)

# Formative Data Sources

UMCS is an innovative, Design Thinking, reform-minded, flexible organization. We continuously reflecting upon our practices, researching and introducing new initiatives and iterating upon our current practices and systems. The list below details some of the more significant projects we have completed, from pilots to full implementation during the NGLC Planning Grant timeframe.

#### **SYSTEMS**

- Capture and support academic outcomes with benchmark assessments (NWEA) Winter 2015-present
- Implement new SIS and Assessment platform (Illuminate) SY 2015-16
- Pilot new state Interim Assessments to prepare students for CAASPP Spring 2015
  - In-house mentoring of beginning teachers
  - Clearing CA credential (BTSA) Fall 2015
  - Coaching for newly credentialed Montessori teachers Winter 2016

#### STUDENT LEARNING

- Year 1 of Summer Learning Program (an intervention for 40+ students) Summer 2015
- Comprehensive redesign of Response to Intervention (RTI) model/process SY 2015-16
- Implementation of multi-age Upper Elementary Program (G4-5, 3 classrooms) SY 2015-16
  - "Notice and Care" community engagement Spring 2015
  - Pilot student-designed electronic work plan Fall 2015
- Implementing online learning platforms Pilot Summer 2015, Implement SY 2015-16
  - Mindplay (as an elementary intervention)
  - Todo Math (TK-3)
  - Montessorium (TK-K)
  - Edoki (TK-K)
  - IXL (G1-3)
  - Google Classroom, Newsela, Typing Club (G4-5)
- Create and staff new positions
  - Reading Interventionists .8 FTE Winter 2015, 1.25 FTE Winter 2016
  - Art Teacher (.5 FTE) Winter 2015
  - PE Teacher (.3 FTE) Fall 2015
- Implement new curricula
  - Toolbox (SEL) SY 2015-16
  - Lucy Calkin's Units of Study for both Reading and Writing SY 2015-16

## Planning Grant Pilots & Projects

#### STUDENT LEARNING, CONTINUED FROM PREVIOUS PAGE

- Launch redesigned after school program, UMAC, focus on innovative, engaging content Fall 2016
  - Pilot after school academic program offerings Winter 2016
- First overnight field trip (Camp Arroyo) Spring 2016
- Piloted Google Cardboard (9 classrooms) Fall 2015

#### **PARTNERSHIPS**

- d.school (Stanford University)
  - Ongoing PD at d.school
  - Spark Truck Spring 2015
  - Collaborative on-site curriculum planning 2015-16 SY
- Local sister schools
  - Unity High School seniors as reading buddies Winter 2015
  - Julia Morgan School for Girls (GO GIRLS: service learning) Winter 2016
- Represent at relevant annual conferences (with an eye toward presenting in the near future)
  - Montessori (un)Conference Summer 2015
  - AMS Conference Spring 2016
  - Ashoka Changemakers School Summit Spring 2016

## Planning Grant Pilots & Projects

UMCS was and is honored to have been recognized as an NGLC Oakland Planning Grant winner. We made very good use of both the additional resources as well as the opportunity to connect with other like-minded innovators. We conducted research and empathy work, engaged with other innovators, and built our technology baseline. We thought you might like to see some of the benefits of our affiliation with NGLC.

- Research off-site learning and work (subs and some travel expenses funded by grant)
  - Design Days
    - Mastery Design Collective hosted
    - Internal UMCS
  - School Tours
    - Seven local NGLC tours (sending at least 2 staff on each occasion)
    - NGLC Montessori school in Austin, TX (Montessori for All, 1 staff)
  - Conferences
    - Montessori unConference (2 staff Salt Lake City Summer 2015)
    - AMS Annual Conference (4 staff Chicago Spring 2016)
    - Montessori unConference (TBD staff Boston, MA Summer 2016)
- II. Engagement with NGLC/personalized learning community Networking Opportunities
  - Hosting multiple visitors to tour our school during our school day (introduction, observations, debrief/Q&A)
    - Local NGLC schools (individually and in groups)
    - Imaginarium (Denver)
    - Chicago NGLC schools
    - Atlanta (DT/STEAM)
    - National Eli Broad residents
    - Washington State Charter School Association (prospective school designers & founders)
    - Montessori Sky Schools (network of Montessori schools in South Africa)
    - Kansas City school innovators (Tom Vander Ark)
  - Other networking activities
    - Posting on NGLC Oakland Google group
    - Posting on Twitter (~900 followers)
    - Presented at 1/20 Showcase event

- Technology Baseline largely funded by grant
  - Oakland Google Education Symposium (Full Staff - Fall 2015)
  - Devices
  - Student (40 Chromebooks, 20 iPads, peripherals)
  - Teacher (8 Macbook Airs, 12 projectors, peripherals)
  - Learning Platform Subscriptions (Mindplay, TodoMath, IXL, Motion Math, C8 Sciences)
  - Illuminate (SIS and assessment tools)
  - Supplementing site bandwidth capacity

NGLC Impact

Urban Montessori actively promotes Social Emotional Learning through a wide range of curricula and practice:

- Montessori Peace Education: Montessori's implicit 100-year-old conflict resolution curriculum
- Positive Discipline: Well-known system that focuses on behaviors and choices children make
- The Toolbox & Honoring the Light of the Child: Concrete, third-party tools that build valuable personal skills including self-awareness, self-management and relationship skills to foster responsible decision making
- Mindfulness: Meditative practice develops children's ability to unemotionally direct attention to unfolding experiences, encouraging open-minded curiosity and non-judgmental acceptance. This practice is used to foster self and community awareness.

# Social Emotional Learning

#### At a glance, this will be the Middle School daily schedule:

**8:15 AM - 8:45 AM**: Morning Work Period--Students may use this time to collaborate on projects, seek help on assignments from the previous day, organize for the day, etc.

**8:45 AM - 9:00 AM**: Morning Meeting/Advisory--Students disperse and receive information pertinent to their school day and meet with their advisors to discuss goals, problems, solutions, projects, etc.

**9:00 AM - 12:00 PM:** Uninterrupted Morning Work Period/Core Class Work/Offsite Internship Work--Students, respectively, complete projects, independent and group work, receive lessons and assignments from teachers or assemble at the place of their off-site location to engage in internship work

**12:00 PM - 1:00 PM**: Lunch, Social, Committee/Government, Active Time--Students choose suitable locations and peer groups to eat, converse, meet in government or committee groups to plan, and engage in unstructured physical activities

**1:00 PM - 2:50 PM**: Independent Study/Enrichment Activities--Students engage in research for their independent learning projects and design and participate in their desired enrichment classes

**2:50 PM - 3:00 PM**: Organizing, Cleaning, Preparing the Environment--Students ready their physical environment for the next school day

# Sample Schedule

As a direct result of our involvement in the NGLC Planning Cohort, we had hundreds of visitors from around the city, state and country ask to visit our school because of the dramatically different window we provide into personalized learning. Here are some of the observations our visitors have shared with us (we collect this feedback anonymously):

"I loved listening to the conversations that were happening among students. It was clear that there were a lot of opportunities for student leadership to be developed and students were interested in owning their learning. Also, it was really fun to see that much diversity in a Montessori setting."

"It was a great experience to see all the student choice involved in the morning work time. You could tell students were engaged and motivated to learn."

"Such a great visit. I loved seeing such a different model and was so impressed with how happy, engaged and self-directed the students were."

"Kids were engaged and self-directed, kids seemed calm and cooperative, kids were being kids in a structured activity and free to be themselves."

"I really appreciated the chance to visit Urban Montessori - thank you! I felt like I was in a place where kids were really enjoying learning and getting what they need when they need it."

# Visitors' Voices