

## Application Information Sheet

### PRIMARY CONTACT INFORMATION

Name: Kristy Sakai/Casey Akena

Current Employer & Position/Title: Chaminade University, Lab School Administrator/Hawaii DOE, Exec Asst OCID

Expected Role with the Applicant School: Curriculum Support/HOS

Mailing Address:

Phone:

Email:

### APPLICANT SCHOOL INFORMATION

Applicant School Name: Mana 'Ulu Montessori Charter Lab School

Mission and Vision:

**Mission:** Mana 'Ulu offers its students and families a high quality, hands-on, holistic education in a safe, loving, and empowering environment that encourages choice and place-based mindfulness to prepare them for life, service and the fulfillment of cosmic tasks. Guided by Montessori education philosophy and methodology, Mana 'Ulu encourages the development of moral character, personal competencies, and a commitment to build a just and peaceful society. Mana 'Ulu offers both the Chaminade and the broader Early Childhood Education communities in Hawaii a venue in the pursuit of research and innovation for a well prepared workforce.

**Vision:** Inspired by the wisdom of kūpuna (elders), the natural beauty of Hawai'i, and guided by the global themes of peace and community embedded in the Montessori philosophy, we envision a world where our graduates embody the spirit of aloha, embrace lifelong learning with a sense of wonder, and become compassionate leaders who malama (care for) our community.

List of Applicant Governing Board Members:

Scott Nishimoto, Andrea Blackwell, Dana Ciacci

State whether you have hired or contracted a consultant or a company/ies to assist you in the development and/or writing of your charter application.

☐ Yes

☒ No

If yes, please identify the name(s) of the consultant/company(ies):

Click or tap here to enter text.

<p>Geographic Location of your Facility:</p> <p>Honolulu Chaminade University 3140 Waialae Avenue Honolulu, HI 96816</p>	<p>Which complex areas do you anticipate attracting students from:</p> <p><input type="checkbox"/> Statewide</p> <p><input checked="" type="checkbox"/> Farrington-Kaiser-Kalani</p> <p><input checked="" type="checkbox"/> Kaimuki-McKinley-Roosevelt</p> <p><input checked="" type="checkbox"/> Aiea-Moanalua-Radford</p> <p><input checked="" type="checkbox"/> Leilehua-Mililani-Waialua</p> <p><input checked="" type="checkbox"/> Campbell-Kapolei</p> <p><input checked="" type="checkbox"/> Pearl City-Waipahu</p> <p><input checked="" type="checkbox"/> Nanakuli-Waianae</p> <p><input checked="" type="checkbox"/> Castle-Kahuku</p> <p><input checked="" type="checkbox"/> Kailua-Kalaheo</p> <p><input type="checkbox"/> Hilo-Waiakea</p> <p><input type="checkbox"/> Kau-Keaau-Pahoa</p> <p><input type="checkbox"/> Honokaa-Kealakehe-Kohala-Konawaena</p> <p><input type="checkbox"/> Baldwin-Kekaulike-Kulanihako-Maui</p> <p><input type="checkbox"/> Hana-Lahainaluna-Lanai-Molokai</p> <p><input type="checkbox"/> Kapaa-Kauai-Waimea</p>
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Grades Served Year 1 (SY 2024-2025):    PRE-K ONLY

Grades Served at Capacity:    PRE-K ONLY

Type of Charter School (Select One):

☒ Start-up charter school, as defined in HRS Chapter 302D-13

☐ Conversion charter school, as defined in HRS Chapter 302D-13

Name of HIDOE school to be converted:

Proposed School Description		
<p>School Model/Focus (check all that apply)</p>	<p><input type="checkbox"/> Alternative</p> <p><input type="checkbox"/> Arts</p> <p><input type="checkbox"/> Blended Learning</p> <p><input checked="" type="checkbox"/> Career and Technical Education</p> <p><input type="checkbox"/> Cultural Focus (specify):</p> <p><input type="checkbox"/> Disability (specify):</p>	<p><input type="checkbox"/> Language Immersion (specify):</p> <p><input checked="" type="checkbox"/> Montessori</p> <p><input type="checkbox"/> STEM</p> <p><input type="checkbox"/> Virtual Learning</p> <p><input checked="" type="checkbox"/> Other (specify): Training/observation/practicum site for Chaminade University programs</p>

Check that apply
<p><input type="checkbox"/> Virtual Blended Learning</p> <p><input type="checkbox"/> Third Party Providers</p> <p><input type="checkbox"/> Conversion Charter Schools</p>

**PURPOSE OVERVIEW:** The following questions seek to discover the why behind the proposed new charter school.

### QUESTION 1

BOE Policy E-700 requires charter schools to fulfill a distinct purpose in public education in Hawai'i.

How is the proposed charter school design innovative, unique, and important to the public education landscape of the state of Hawai'i?

Your response must include how the proposed school will meet each of the following:

1. address the needs of public education;
2. provide more public school options for students and families;
3. implement innovative educational practices;
4. reflect Hawai'i's diverse cultures, places, and values;
5. provide community-based school models and local control over education; and
6. provide high-quality public education for the students and communities they serve.

### EVALUATION CRITERIA:

*Response demonstrates evidence in all six areas of BOE Policy E-700 and should:*

- *align with the Commission's Strategic Plan Characteristics of High Quality Charter Schools.*
- *align with the Commission's Strategic Plan Characteristics of Innovative practices in public charter schools*
- *align with the Commission's Strategic Plan Diverse Educational Opportunities in Hawai'i*
- *included evidence of research supporting the school concept as innovative*
- *include data from surrounding Department schools and complexes that supports a new charter school*
- *include evidence of community outreach and participation efforts in determining the needs of the community*

### NARRATIVE SECTION:

This proposed Mana 'Ulu Montessori Charter Lab School offers a unique and innovative approach to education in Hawai'i, with research supporting its key design elements:

- **Community-Driven Model:** Research consistently demonstrates the positive impact of community schools on student achievement, engagement, and well-being (Epstein, 2018). This model is crucial in the public education landscape of Hawai'i, where strong community ties and cultural values are deeply valued. By fostering partnerships with local organizations and families, the school will create a supportive and enriching learning environment that reflects the unique needs and strengths of the East O'ahu community by honoring place and community. The Farrington-Kalani-Kaiser and Kaimuki-McKinley-Roosevelt Complex Areas (where the school will reside) is currently challenged with the lack of wide-spread early childhood and preschool programs for the community (closures of private programs).
- **Culturally Responsive Montessori Education:** Studies highlight the importance of culturally responsive education in promoting engagement, motivation, and a sense of belonging among students, particularly those from marginalized groups (Gay, 2018). The school's integration of Hawaiian values, language, and practices into the Montessori curriculum aligns with this research, creating a culturally affirming learning environment that honors the rich heritage of Hawai'i and empowers Native Hawaiian students. Support from the Office of Hawaiian Education

(within the Department of Education) will be a critical factor in this implementation.

- **"Farm-to-ECE" Integration:** Research indicates that "farm-to-school" programs can improve student nutrition, increase consumption of fruits and vegetables, and enhance academic performance (Henry & Shorter, 2016). This innovative approach is particularly important in Hawai'i, where there is a growing emphasis on food sustainability and a need to strengthen local food systems. By integrating hands-on learning experiences related to agriculture, nutrition, and environmental stewardship, the school will cultivate 21st-century skills and promote a deeper understanding of the interconnectedness between food, culture, and the environment.
- **Addressing the Early Childhood Workforce Shortage:** The school's commitment to supporting early childhood education and teacher training, starting with a high-quality preschool to become a training site for Chaminade University's ECE teacher training program, directly addresses the growing workforce shortage in this critical field. Research emphasizes the importance of investing in early childhood education to improve long-term educational outcomes and reduce achievement gaps (Heckman, 2011). By providing a strong foundation in Montessori principles and culturally responsive practices, the school will contribute to the development of a skilled and dedicated early childhood workforce in Honolulu.
- **Alignment with Higher Education Initiatives:** The school's focus on Montessori education aligns with initiatives like the Montessori Certificate Program at Chaminade University, highlighting the growing recognition of this approach in Hawai'i's educational landscape. Research supports the effectiveness of Montessori education in fostering cognitive development, social-emotional skills, and academic achievement (Lillard & Else-Quest, 2006). This alignment creates pathways for collaboration and professional development, further strengthening the quality of early childhood education in the state.
- **Addressing the Early Childhood Market:** With a large number of private preschool and pre-kindergarten programs closing by the end of Fiscal Year 2025, our Montessori Preschool will serve a much needed learning gap in the community.

This charter school's innovative design, backed by research and combining Montessori principles, Hawaiian values, community partnerships, and "farm-to-ECE" initiatives, offers a unique and much-needed contribution to the public education landscape of Hawai'i. By addressing the specific needs and challenges of the community, the school aims to create a model for culturally responsive, sustainable, and community-centered education that can inspire and benefit other schools across the state.

#### SUBMITTING ATTACHMENTS?

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

#### Notes:

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 1 – Attachment 1, Question 1 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

**QUESTION 2**

State the proposed school's mission and vision.

**EVALUATION CRITERIA:**

*Response must include:*

- *a clear statement of mission and vision;*
- *a mission and vision focused on learning based on student needs; and*
- *a mission and vision that is relevant to the community the applicant proposes to serve*

**NARRATIVE SECTION:**

Mission: Mana 'Ulu Montessori Charter Lab School offers its students and families a high quality, hands-on, holistic education in a safe, loving, and empowering environment that encourages choice and place-based mindfulness to prepare them for life and service to others. Guided by Montessori philosophy and methodology, Mana 'Ulu Montessori Charter Lab School encourages the development of moral character, personal competencies, and a commitment to build a just and peaceful society. Mana'Ulu offers both the Chaminade and the broader Early Childhood communities in Hawaii a venue in the pursuit of research and innovation for a well prepared workforce and community.

Vision: Inspired by the wisdom of kūpuna (elders) and the natural beauty of Hawai'i, Mana 'Ulu Montessori Charter Lab School envisions a world where our graduates embody the spirit of aloha, embrace lifelong learning with a sense of wonder, and become compassionate leaders who malama (care for) our community.

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Select # of attachments number of attachments submitted.

*Notes:*

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**QUESTION 3**

Describe the process, specify the people involved, and rationale that helped in the development of the mission, vision, and school design.

**EVALUATION CRITERIA:**

*Response must include, but is not limited to:*

- *a description of the process the board took to develop their mission and vision and school design. (Examples may include other schools or programs that have been researched or visited and what was learned from them that influenced this mission, vision and school design.)*
- *describe the foundational values that led to the creation of the mission and vision and how the mission and vision align to the educational needs of the students that the school seeks to serve.*
- *evidence of community engagement of the steps to develop their school design and how the community's input and feedback informed or changed the school concept over time.*
- *evidence of research conducted supporting the need for this charter school in this community (examples may include academic performance reports from local schools, surveys, community forums, interviews from the community the schools proposes to serve).*

**NARRATIVE SECTION:**

Developing a successful Montessori preschool requires a thoughtful and collaborative process. Here's how this process unfolded, as well as the rationale for a Montessori preschool:

**Process for Developing the School:**

1. **Needs Assessment and Feasibility Study:** Conduct thorough research to determine the need for a Montessori preschool in Honolulu. This involves analyzing demographic data, assessing existing preschool options, and conducting surveys and focus groups with families to understand their needs and preferences. With the closure of private preschool programs in Honolulu, a viable site for prospective families is needed.
2. **Curriculum Development:** The development of a high-fidelity Montessori curriculum that aligns with the school's mission and vision, incorporating Hawaiian values, sustainability principles, and "farm-to-school" initiatives is a priority. This curriculum will be tailored to the developmental needs of multi-age preschoolers, as well as a curriculum focused on "place" and community.
3. **Partnership with Chaminade University:** Collaboration with Chaminade University's Montessori Teacher Education Program will ensure alignment with best practices and access to qualified teachers. Addressing the workforce pipeline is yet another reason for the partnership. This partnership will involve:
  - **Curriculum review and feedback:** Provide expertise in Montessori pedagogy and child development.
  - **Teacher recruitment and training:** Recruit qualified Montessori teachers and provide ongoing professional development opportunities.
  - **Access to resources:** Utilize Chaminade's resources, such as its library, research materials, and expertise in early childhood education.

4. **Community Engagement:** We have established a strong community presence by engaging with families, community organizations, and local businesses already. This could involve hosting open houses, informational meetings, and parent workshops.
5. **Facility and Resources:** Secure a suitable facility that meets the needs of a Montessori preschool, including spacious classrooms, outdoor learning areas, and access to natural elements. Acquire high-quality Montessori materials and learning resources.
6. **Licensing and Accreditation:** Obtain the necessary licenses and accreditation from the Hawai‘i Department of Human Services and relevant educational agencies to ensure compliance with quality standards.

**Rationale for Mana ‘Ulu Montessori Charter Lab School:**

- **Fosters Holistic Development:** Montessori education emphasizes the development of the whole child—cognitive, social-emotional, physical, and spiritual—through hands-on learning, individualized instruction, and a prepared environment.
- **Promotes Independence and Self-Direction:** Montessori encourages children to become independent learners, fostering self-confidence, problem-solving skills, and a love of learning.
- **Cultivates a Love of Nature:** The emphasis on natural materials, outdoor learning, and respect for the environment aligns with Hawaiian values and promotes environmental stewardship.
- **Prepares for Future Success:** Research indicates that Montessori education can have a positive impact on children's academic achievement, social skills, and executive function, setting them up for success in school and beyond.

**Partnership with Chaminade University:**

Collaborating with Chaminade University offers numerous benefits:

- **Ensures High-Quality Montessori Education:** Chaminade's expertise in Montessori teacher education ensures that the school's curriculum and practices align with the highest standards.
- **Provides Access to Qualified Teachers:** The partnership can help address the early childhood workforce shortage by providing a pipeline of qualified Montessori teachers and give education students the opportunity to work as an assistant or aide.
- **Enhances Community Engagement:** Chaminade's connections within the community can help the school expand its reach and build strong partnerships.
- **Supports Research and Innovation:** Collaboration with Chaminade can create opportunities for research and innovation in early childhood education, contributing to the advancement of the field in Hawai‘i, and to provide a “lab school experience” in the early childhood space here in Honolulu..

By following a collaborative and research-based approach, this proposed Montessori charter lab school, in partnership with Chaminade University, can provide a high-quality, culturally responsive, and innovative early childhood education that meets the needs of the community and prepares young learners for a successful future.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 3 – Attachment 1, Question 3 – Attachment 2, etc.*
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**QUESTION 4**

State and provide evidence of the type of applicant governing board being established, pursuant to HRS 302D-13(b).

- Community group
- Department School
- School Community Council
- Group of Teachers and Administrators
- Nonprofit Organization in accordance with HRS 302D-13(b)(4)

Include the reasoning behind this choice of applicant governing board

**EVALUATION CRITERIA:**

*Unless specified below, the response must include the rationale for the selected type of applicant governing board and provide evidence that could include, but is not limited to:*

- *governing board meeting minutes, agendas, attendance that establishes an applicant governing board.*
- *flyers of community meetings; and*
- *letters of support, petitions, or signatures.*

*The selected group must also comply with the following:*

- *department School: HRS 302-13(b)(2); and*
- *group of Teachers and Administrators: HRS 302D-13(b)(3)*

*Selected group must also comply and submit the following:*

- *Nonprofit Organization: Business Records (501(c)(3)),*
- *IRS Tax ID Information, HRS 302D-13(b)(4).*
- *The applicant must submit all Department of Commerce and Consumer Affairs filings in accordance with HRS 302D-1 including the Certificate of Good Standing, and Annual Filings (for the most recent five years), and the Articles of Incorporation.*

**NARRATIVE SECTION:**

For this proposed Mana 'Ulu Montessori Charter Lab School, the governing board is being established by a community group in accordance with HRS 302D-13(b).

**Evidence for a "community group" established governing board:**

- **Diverse Membership:** The board comprises individuals from various segments of the Montessori and Honolulu community, including parents, educators with Montessori experience, business leaders, and representatives from Chaminade University. This diversity ensures a broad range of perspectives and reflects the community's investment in the school.
- **Shared Vision:** The founding members united around a shared vision for a Montessori preschool that incorporates Hawaiian values, emphasizes sustainability, and addresses the need for high-quality early childhood education in the region.
- **Grassroots Effort:** The initiative for the school originated from community discussions, parent meetings, and a recognized need for more diverse early childhood education options. This reflects a bottom-up approach to establishing the charter school.
- **Community Engagement:** The board actively engages with the community through outreach

events, surveys, and forums to gather input and ensure the school reflects the community's needs and aspirations.

**Reasoning behind the Choice:**

Choosing a community group as the applicant governing board aligns with the school's vision of being a true "community lab school." This approach offers several advantages:

- **Responsiveness to Community Needs:** Ensures the school's curriculum, programs, and activities are relevant and beneficial to the community it serves.
- **Sense of Ownership:** Encourages community members to feel invested in the school's success and actively participate in its development.
- **Collaboration:** Builds strong partnerships with families, community organizations, and local resources to create a supportive learning environment.
- **Cultural Relevance:** Facilitates the integration of Hawaiian values and cultural practices into the school's philosophy and curriculum, ensuring a culturally responsive learning environment.

By establishing the governing board through a community-led effort, our charter school aims to create a strong foundation of community support, ensuring its long-term sustainability and success in meeting the educational needs of Honolulu families.

**SUBMITTING ATTACHMENTS?**

☐ NO. There is no attachment submitted for this question.

☒ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

2 attachment submitted

**Notes:**


- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 4 – Attachment 1, Question 4 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

Date of this notice: 12-06-2024

Employer Identification Number:  
33-2281442

Form: SS-4

Number of this notice: CP 575 E

KAMALII FOUNDATION  
% CASEY AGENA  


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

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

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 33-2281442. This EIN will identify your entity, accounts, tax returns, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

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

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

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

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

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

KAMALII FOUNDATION  
% CASEY AGENA

**Streamlined Application for Recognition of Exemption  
Under Section 501(c)(3) of the Internal Revenue Code**

Do not enter Social Security numbers on this form as it will be made public.

Information about Form 1023-EZ and its separate instructions is at [www.irs.gov/form1023ez](http://www.irs.gov/form1023ez)**Note:** If exempt status is approved,  
this application will be open for  
public inspection.**Check this box to attest that you have completed the Form 1023-EZ Eligibility Worksheet in the current instructions, are eligible to apply for exemption using Form 1023-EZ, and have read and understand the requirements to be exempt under section 501(c)(3).**

Have your annual gross receipts exceeded \$50,000 in any of the past 3 years and/or do you project that your annual gross receipts will exceed \$50,000 in any of the next 3 years? If yes, stop. Do not file Form 1023-EZ. See Instructions.

☐ Yes☒ No

Do you have total assets the fair market value of which is in excess of \$250,000? If yes, stop. Do not file Form 1023-EZ. See Instructions.

☐ Yes☒ No**Part I Identification of Applicant**

<b>1a</b> Full Name of Organization KAMALII FOUNDATION		<b>b</b> Care Of Name (if applicable)		
<b>c</b> Mailing Address (number, street, and room/suite). If a P.O. box, see instructions. [REDACTED]		<b>d</b> City HONOLULU	<b>e</b> State HI	<b>f</b> Zip code + 4 96816
<b>2</b> Employer Identification Number 33-2281442	<b>3</b> Month Tax Year Ends (MM) 12	<b>4</b> Person to Contact if More Information is Needed CASEY AGENA		
<b>5</b> Contact Telephone Number [REDACTED]		<b>6</b> Fax Number (optional)	<b>7</b> User Fee Submitted \$275.00	
<b>8</b> List the names, titles, and mailing addresses of your officers, directors, and/or trustees. (If you have more than five, see instructions.)				
First Name: CASEY		Last Name: AGENA		Title: DIRECTOR
Street Address: [REDACTED]		City: HONOLULU	State: HI	Zip code + 4: 96816
First Name:		Last Name:		Title:
Street Address:		City:	State:	Zip code + 4:
First Name:		Last Name:		Title:
Street Address:		City:	State:	Zip code + 4:
First Name:		Last Name:		Title:
Street Address:		City:	State:	Zip code + 4:
First Name:		Last Name:		Title:
Street Address:		City:	State:	Zip code + 4:
First Name:		Last Name:		Title:
Street Address:		City:	State:	Zip code + 4:
<b>9a</b> Organization's Website (if available):				
<b>b</b> Organization's Email (optional):				

**Part II Organizational Structure**

- 1** To file this form, you must be a corporation, an unincorporated association, or a trust. **Select the box** for the type of organization.
- ☒ Corporation ☐ Unincorporated association ☐ Trust
- 2** ☒ **Check this box** to attest that you have the organizing document necessary for the organizational structure indicated above.  
(See the instructions for an explanation of **necessary organizing documents**.)
- 3** Date incorporated if a corporation, or formed if other than a corporation (MMDDYYYY): 12062024
- 4** State of Incorporation or other formation: Hawaii
- 5** Section 501(c)(3) requires that your organizing document must limit your purposes to one or more exempt purposes within section 501(c)(3).
- ☒ **Check this box** to attest that your organizing document contains this limitation.
- 6** Section 501(c)(3) requires that your organizing document must not expressly empower you to engage, otherwise than as an insubstantial part of your activities, in activities that in themselves are not in furtherance of one or more exempt purposes.
- ☒ **Check this box** to attest that your organizing document does not expressly empower you to engage, otherwise than as an insubstantial part of your activities, in activities that in themselves are not in furtherance of one or more exempt purposes.
- 7** Section 501(c)(3) requires that your organizing document must provide that upon dissolution, your remaining assets be used exclusively for section 501(c)(3) exempt purposes. Depending on your entity type and the state in which you are formed, this requirement may be satisfied by operation of state law.
- ☒ **Check this box** to attest that your organizing document contains the dissolution provision required under section 501(c)(3) or that you do not need an express dissolution provision in your organizing document because you rely on the operation of state law in the state in which you are formed for your dissolution provision.

**Part III Your Specific Activities**

- 1** Briefly describe the organization's mission or most significant activities (limit 250 characters)

To provide equitable access to high-quality education for all learners in Hawaii, empowering them to reach their full potential and contribute to their communities.

- 2** Enter the appropriate 3-character NTEE Code that best describes your activities (See the instructions): B29

- 3** To qualify for exemption as a section 501(c)(3) organization, you must be organized and operated exclusively to further one or more of the following purposes. By checking the box or boxes below, you attest that you are organized and operated exclusively to further the purposes indicated. **Check all that apply.**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Charitable   | <input type="checkbox"/> Religious                                    | <input checked="" type="checkbox"/> Educational    |
| <input type="checkbox"/> Scientific   | <input type="checkbox"/> Literary                                     | <input type="checkbox"/> Testing for public safety |
| <input type="checkbox"/> To foster national or international amateur sports competition | <input type="checkbox"/> Prevention of cruelty to children or animals |  |

- 4** To qualify for exemption as a section 501(c)(3) organization, you must:

- ☒ Refrain from supporting or opposing candidates in political campaigns in any way.
- ☒ Ensure that your net earnings do not inure in whole or in part to the benefit of private shareholders or individuals (that is, board members, officers, key management employees, or other insiders).
- ☒ Not further non-exempt purposes (such as purposes that benefit private interests) more than insubstantially.
- ☒ Not be organized or operated for the primary purpose of conducting a trade or business that is not related to your exempt purpose(s).
- ☒ Not devote more than an insubstantial part of your activities attempting to influence legislation or, if you made a section 501(h) election, not normally make expenditures in excess of expenditure limitations outlined in section 501(h).
- ☒ Not provide commercial-type insurance as a substantial part of your activities.

☒ **Check this box** to attest that you have not conducted and will not conduct activities that violate these prohibitions and restrictions.

- |  |                           |                                     |
|--|---------------------------|-------------------------------------|
| <b>5</b> Do you or will you attempt to influence legislation? _____<br>(If yes, consider filing Form 5768. See the instructions for more details.)   | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>6</b> Do you or will you pay compensation to any of your officers, directors, or trustees? _____<br>(Refer to the instructions for a definition of <b>compensation</b> .)                           | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>7</b> Do you or will you donate funds to or pay expenses for individual(s)? _____   | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>8</b> Do you or will you conduct activities or provide grants or other assistance to individual(s) or organization(s) outside the United States? _____  | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>9</b> Do you or will you engage in financial transactions (for example, loans, payments, rents, etc.) with any of your officers, directors, or trustees, or any entities they own or control? _____ | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>10</b> Do you or will you have unrelated business gross income of \$1,000 or more during a tax year? _____  | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>11</b> Do you or will you operate bingo or other gaming activities? _____   | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| <b>12</b> Do you or will you provide disaster relief? _____  | <input type="radio"/> Yes | <input checked="" type="radio"/> No |

**Part IV Foundation Classification**

**Part IV is designed to classify you as an organization that is either a private foundation or a public charity. Public charity status is a more favorable tax status than private foundation status.**

- 1** Are you applying for recognition as a church, school, or hospital (described in section 170(b)(1)(A)(i), (ii), or (iii) of the Internal Revenue Code)? If yes, stop. Do not file Form 1023-EZ. See Instructions ☐ Yes ☒ No
- 2** If you qualify for public charity status, check the appropriate box (**2a - 2c** below) and skip to **Part V** below.
- a** ☐ **Select this box** to attest that you normally receive at least one-third of your support from public sources or you normally receive at least 10 percent of your support from public sources and you have other characteristics of a publicly supported organization. **Sections 509(a)(1) and 170(b)(1)(A)(vi).**
- b** ☒ **Select this box** to attest that you normally receive more than one-third of your support from a combination of gifts, grants, contributions, membership fees, and gross receipts (from permitted sources) from activities related to your exempt functions and normally receive not more than one-third of your support from investment income and unrelated business taxable income. **Section 509(a)(2).**
- c** ☐ **Select this box** to attest that you are operated for the benefit of a college or university that is owned or operated by a governmental unit. **Sections 509(a)(1) and 170(b)(1)(A)(iv).**
- 3** If you are not described in items **2a - 2c** above, you are a private foundation. As a private foundation, you are required by section 508(e) to have specific provisions in your organizing document, unless you rely on the operation of state law in the state in which you were formed to meet these requirements. These specific provisions require that you operate to avoid liability for private foundation excise taxes under sections 4941-4945.
- ☐ **Select this box** to attest that your organizing document contains the provisions required by section 508(e) or that your organizing document does not need to include the provisions required by section 508(e) because you rely on the operation of state law in your particular state to meet the requirements of section 508(e). (See the instructions for explanation of the section 508(e) requirements.)

**Part V Reinstatement After Automatic Revocation**

**Complete this section only if you are applying for reinstatement of exemption after being automatically revoked for failure to file required annual returns or notices for three consecutive years, and you are applying for reinstatement under section 4 or 7 of Revenue Procedure 2014-11. (Check only one box.)**

- 1 ☐ **Check this box** if you are seeking retroactive reinstatement under section 4 of Revenue Procedure 2014-11. By checking this box, you attest that you meet the specified requirements of section 4, that your failure to file was not intentional, and that you have put in place procedures to file required returns or notices in the future. (See the instructions for requirements.)
- 2 ☐ **Check this box** if you are seeking reinstatement under section 7 of Revenue Procedure 2014-11, effective the date you are filing this application.

**Part VI Signature**

☒ **I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, and to the best of my knowledge it is true, correct, and complete.**

CASEY AGENA

(Type name of signer)

DIRECTOR

(Type title or authority of signer)

12212024

(Date)

**QUESTION 5** *This question is required only to an applicant group that has an associated nonprofit entity. (this would NOT apply to a nonprofit organization apply to be a charter school)*

Describe the purpose and mission of the associated nonprofit, and give the names, occupations and a brief summary describing the roles of the non-profit board members;

Identify any existing relationships that could pose actual or perceived conflicts of interest if the application is approved; and discuss specific steps that the applicant governing board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Submit all Department of Commerce and Consumer Affairs filings in accordance with HRS 302D-1 including the Certificate of Good Standing, and Annual Filings (for the most recent five years), and the Articles of Incorporation.

**If *this does not apply to your school. Please state in the narrative section: Does not apply.***

**EVALUATION CRITERIA:**

*Response could include, but is not limited to:*

- *Evidence that the proposed school plan includes a system to conduct regular reviews of the associated nonprofit policies, engage in ongoing professional development that pertains to their work as public agents, and follow all applicable ethics guidelines and statutory responsibilities as they pertain to their fiduciary duties as volunteer public servants.*
- *All Department of Commerce and Consumer Affairs filings in accordance with HRS302D-123 including the Certificate of Good Standing, and Annual Filings (for the most recent five years), and the Articles of Incorporation are provided.*

**NARRATIVE SECTION:**

**Purpose and Mission of the Associated Nonprofit:**

The associated nonprofit organization, **Kamalii Foundation**, was established to support the development and operation of Mana 'Ulu Montessori Charter Lab School and its governing board.

**Mission:**

To champion high-quality early childhood education in Honolulu by providing resources, advocacy, and community partnerships that foster a thriving learning environment for all keiki (children), grounded in Montessori principles, and a commitment to sustainability through aloha, lokahi and malama.

**Nonprofit Board Members:**

- **Aaron Domingo:** An important figure in the business community, coupled with a deep knowledge of Hawaiian traditions and values. Mr. Domingo will provide guidance on integrating cultural elements into the school's curriculum and practices with the fiscal sustainability of the organization.



- **Rae Kim** : A Human Resource specialist with ties to the State system. Ms. Kim will provide guidance to the community at-large and position the organization to positively impact the community.
- **Kristy Sakai** (non-voting): A longtime early childhood educator and advocate in the community, Ms. Sakai will be an active non-voting member supporting the operations and management of the foundation.
- **Casey Agena** (non-voting): A longtime leader in the education space, Mr. Agena will be an active non-voting member supporting the operations and fiscal management of the foundation.

**Steps to Avoid and Mitigate Conflicts:**

- **Transparency:** The nonprofit board will maintain transparency regarding all financial transactions, decision-making processes, and relationships with the charter school.
- **Recusal Policy:** Board members will recuse themselves from any discussions or votes related to matters where they have a potential conflict of interest.
- **Conflict of Interest Policy:** The nonprofit will develop a clear conflict of interest policy that outlines procedures for identifying, disclosing, and managing potential conflicts.
- **Regular Training:** Board members will receive regular training on conflict of interest issues and ethical governance practices.
- **Independent Oversight:** The nonprofit will establish an independent oversight committee composed of community members not affiliated with the charter school to review financial transactions and ensure accountability.

By proactively addressing potential conflicts of interest and maintaining transparency, the nonprofit board will ensure that all decisions are made in the best interests of the children and families served by Mana ‘Ulu Montessori Charter Lab School.

**SUBMITTING ATTACHMENTS?**

☐ NO. There is no attachment submitted for this question.

☒ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

1 attachment submitted

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 5 – Attachment 1, Question 5 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

The Kamalii Foundation recognizes the crucial role a strong and dedicated non-profit board plays in the success of the Mana Ulu Charter Lab School and its governing school board. To ensure effective governance and ongoing guidance, the foundation will implement a comprehensive recruitment strategy to attract and retain qualified board members.

### **Recruitment Strategies:**

#### **1. Targeted Outreach:**

- **Community Networks:** Leverage existing community networks, including parent groups, educational organizations, and community leaders, to identify potential board candidates with relevant skills and experience.
- **Professional Associations:** Connect with professional associations in education, business, law, and finance to reach individuals with expertise valuable to the school's governance.
- **University Partnerships:** Collaborate with Chaminade University and other educational institutions to identify potential board members with expertise in Montessori education, child development, and school administration.

#### **2. Public Announcements:**

- **Website and Social Media:** Utilize the school's website and social media platforms to publicize board vacancies and encourage interested individuals to apply.
- **Community Publications:** Place announcements in local newspapers, community newsletters, and online forums to reach a wider audience (as well as through Chaminade University).
- **Open Houses and Events:** Promote board opportunities at school open houses, parent meetings, and community events to raise awareness and attract potential candidates.

#### **3. Clear Recruitment Criteria:**

- **Skills and Expertise:** Define specific skills and expertise needed on the board, such as finance, law, education, fundraising, and community engagement.
- **Diversity and Representation:** Prioritize diversity and representation on the board, seeking individuals from various backgrounds, professions, and experiences to reflect the community served by the school.
- **Commitment to Mission:** Clearly articulate the school's mission and values to attract candidates who are passionate about Montessori education, Hawaiian culture, and the school's vision.

#### 4. **Application and Interview Process:**

- **Formal Application:** Develop a formal application process that includes a written application, resume, and references.
- **Comprehensive Interviews:** Conduct thorough interviews with potential candidates to assess their qualifications, experience, and commitment to the school's mission.
- **Background Checks:** Conduct background checks to ensure the suitability and integrity of potential board members and abide. The foundation will also ensure that all employees, agents, representatives, and assignees interacting with students and have passed DOE background check requirements (Act 156, SLH 2024, Hawaii Harm to Student Registry)

#### 5. **Ongoing Board Development:**

- **Orientation and Training:** Provide new board members with comprehensive orientation and training on their roles, responsibilities, and legal obligations.
- **Mentorship Program:** Pair new board members with experienced mentors to provide guidance and support during their initial term.
- **Continuing Education:** Offer ongoing professional development opportunities for board members to enhance their governance skills and knowledge of current educational trends within our Montessori approach.

#### **Collaboration with Chaminade University:**

The Kamalani Foundation will continue to collaborate with Chaminade University to leverage their expertise and resources. This may include:

- **Accessing Chaminade's Network:** Tap into Chaminade's network of alumni, faculty, and community partners to identify potential board candidates.
- **Joint Recruitment Efforts:** Collaborate with Chaminade on joint recruitment events and initiatives to reach a wider pool of qualified individuals.
- **Utilizing Chaminade's Expertise:** Seek guidance from Chaminade faculty and staff on best practices in board recruitment, governance, and leadership development.

By implementing these strategies, the Kamalani Foundation will ensure that the Mana Ulu Charter Lab School has a strong and dedicated governing board that provides effective guidance, oversight, and support for the school's long-term success.

**ACADEMIC OVERVIEW:** The following questions seek to understand the instructional intention and assessment practices of the proposed new charter school. This section gets to the delivery of instruction and the monitoring of student performance both at an operational and governance level.

#### QUESTION 6

What will be the proposed school's Mission Aligned Initiative (MAI)?

The MAI can be found in the Pre-K only contract Section 6.13. and Exhibit A. Academic Performance Framework

#### EVALUATION CRITERIA:

*Response must include reference to:*

- *the Pre-K only contract Section 6.13.. and Exhibit A. Academic Performance Framework (Articulation of a yearlong curriculum with units/lessons and assessments that target an aspect of the school mission/vision).*

*Response may reference but is not limited to:*

- *characteristics of Innovative Practices;*
- *characteristics of High Quality: Promoting a Culture of Continuous Learning and Improvement;*
- *specific examples of MTSS, equitable access to instruction for challenged learners;*
- *aligned professional development for staff and parents;*
- *references social emotional learning and a discipline program that aligns with the mission and vision; and*
- *reference to academic and social emotional data monitoring.*

#### NARRATIVE SECTION:

Mana 'Ulu Montessori Charter Lab School's mission aligned initiative, "Malama 'Āina" (Caring for our Earth), will be a cornerstone of its multi-age preschool program. Aligning with the school's mission and vision, this initiative will foster a deep connection to the natural world and cultivate environmental stewardship in young learners through a high-fidelity Montessori curriculum and pedagogical practices.

#### **3 year long rotating Curriculum with Units/Lessons and Assessments:**

The Malama 'Āina initiative will be integrated throughout the year, with units and lessons adapted to engage preschoolers in ways that are developmentally appropriate:

- **Connecting to 'Āina (Land and Place):**
  - **Lessons:** Exploring the school garden through sensory activities like smelling herbs and feeling different textures of soil, learning about native plants through songs and stories, engaging in simple composting activities, and observing the growth of seedlings.
  - **Assessments:** Expressing observations through drawings and storytelling, participating in planting and watering activities, creating nature collages with found objects.
- **Solar System and Universe (Seeing the big picture):**
  - **Lessons:** Observing the night sky, learning about the planets and the properties of different planets, understanding that the sun is a star, classifying solids, liquids and gases.

- **Assessments:** Being able to place the planets in order from the closest to the sun, participating in group discussions, demonstrating proper use of classroom materials
- **The Continents, People and Culture:**
  - **Lessons:** Learning continent names, learning about cultures and people around the world, landforms, map making, family heritage
  - **Assessments:** Making a continent map, naming all the continents and identifying on a map. understanding where families in the class are from
- **Hawaii and Community:**
  - **Lessons:** Volcanoes and how islands are formed, Hawaiian island names and characteristics of each island, learning about the community and people's roles in the community.
  - **Assessments:** Participating in classroom discussions, Hawaiian island map making, demonstrating an understanding of volcanoes through classification activities.

#### High-Fidelity Montessori Practices:

Ensuring all components of authentic Montessori environment: Nature/reality, Materials, Teacher (Montessori credentialed and trained), Beauty/aesthetics, Community, Freedom, Community, Mixed Ages

The initiative will be implemented through high-fidelity Montessori practices, including:

- **Prepared Environment:** The classroom will be carefully designed to provide opportunities for exploration and discovery, with natural materials, real tools, and areas for gardening and nature exploration.
- **Sensorial Exploration:** Children will engage in activities that stimulate their senses and connect them to the natural world, such as exploring textures, smelling herbs, and listening to nature sounds.
- **Practical Life Activities:** Children will learn practical skills related to caring for the environment, such as watering plants, composting, and recycling.
- **Grace and Courtesy:** Children will be encouraged to treat the environment with respect and care, fostering a sense of responsibility and appreciation for the natural world.

#### Connection to Mission and Vision:

By embedding the initiative within a high-fidelity Montessori curriculum, the preschool program will:

- **Foster Sense of Belonging:** Cultivate a love for nature and a sense of responsibility for caring for self and others.
- **Promote Aloha:** Encourage respect and appreciation for all living things, fostering a sense of interconnectedness and compassion.
- **Embrace Lifelong Learning:** Inspire a lifelong love of nature and a commitment to environmental stewardship.

This approach aims to create a foundation for environmental awareness and responsibility in young learners, empowering them to become future caretakers of our planet.

**SUBMITTING ATTACHMENTS?**

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 6 – Attachment 1, Question 6 – Attachment 2, etc.*
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**QUESTION 7**

Pre-k only Public Charter schools authorized by the commission in the State of Hawai'i, are required to utilize the following classroom assessments (currently Teaching Strategies or Native Hawaiian culture based assessment, CLASS, ECERS-3). What other measures will be used to assess the effectiveness of your educational program? Describe how the proposed school intends to demonstrate and assess student academic performance.

**EVALUATION CRITERIA:**

*Response could include, but is not limited to:*

- *examples of formative and summative measures to be used in assessment of student progress. (Such as Site-specific Diagnostics);*
- *example of a well-articulated curriculum with benchmarks;*
- *evidence of grade level meetings; and*
- *embedded teacher planning time.*

**NARRATIVE SECTION:**

We are committed to providing a high-quality early childhood education that meets the highest standards of excellence. To demonstrate this commitment, our charter lab school will seek accreditation from the National Association for the Education of Young Children (NAEYC) and school membership with the American Montessori Society (AMS). These prestigious recognitions will validate the school's adherence to best practices in early childhood education and Montessori pedagogy.

**NAEYC Accreditation:**

NAEYC accreditation is a rigorous process that evaluates early childhood programs on ten standards of quality, including curriculum, teaching, assessment, health, and family engagement. Achieving NAEYC accreditation will demonstrate the school's commitment to providing a developmentally appropriate and enriching learning environment for all students.

**AMS School Membership:**

AMS school membership signifies that the school meets the high standards of Montessori practice set forth by the American Montessori Society. This includes adherence to the Montessori method, utilization of authentic Montessori materials, and employment of qualified Montessori teachers.

**Comprehensive Assessment Approach:**

The school will utilize a comprehensive approach to assessment, going beyond standardized measures like Teaching Strategies Gold, CLASS, and ECERS-3, to evaluate the effectiveness of its educational program and demonstrate student academic performance. This approach will include:



- **Transparent Classroom:** This early childhood learning management system will be used to record observations, track developmental milestones, generate progress reports, and facilitate communication between teachers and parents.
- **Formative Assessments:** Ongoing assessments will focus on anecdotal observation, practice with materials, and teacher-presented lessons to provide continuous feedback and guide instruction.
- **Summative Assessments:** These assessments will occur at the end of each unit and the school year to evaluate students' overall progress and mastery of learning objectives.
- **Montessori-based Assessments:** These ongoing assessments will focus on observing and documenting children's progress in key developmental areas through daily classroom activities.
- **Portfolio Assessments:** Each child will have a portfolio documenting their learning journey, providing a comprehensive picture of their individual progress and growth.
- **Parent-Teacher Conferences:** Regular conferences will be held to discuss each child's progress and involve parents in their child's education.
- **Community-Based Projects:** Participation in community projects will be assessed to evaluate students' understanding of environmental stewardship, cultural awareness, and social responsibility.

By seeking NAEYC accreditation and AMS school membership, and implementing a comprehensive assessment system, the Mana 'Ulu Montessori Charter Lab School will ensure a high-quality, authentic Montessori education that meets the needs of all students and prepares them for success. This commitment to excellence will benefit our community and contribute to the advancement of early childhood education in Honolulu.

#### SUBMITTING ATTACHMENTS?

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

#### Notes:

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 7 – Attachment 1, Question 7 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

### QUESTION 8

What processes are in place to ensure that all pre-K teachers and educational aids meet the licensing requirements pursuant to HRS302A-805 and section 8-64-1.1, Hawai'i Administrative Rules (HAR) and the Hawai'i Teacher Standards Board (HTSB) for prekindergarten teachers, which includes required coursework in early childhood education or enrollment in State-approved teacher education program?

#### EVALUATION CRITERIA:

*Response must include:*

- *Compliance with HRS 302A-805 and HAR 8-54-1.1 requirements*
- *Evidence of HTSB licensing qualifications for Pre-K teachers, including early childhood education coursework or enrollment in a teacher education program*
- *Describes a clear plan for verifying teacher qualifications and providing necessary support for certification completion.*

#### NARRATIVE SECTION:

To ensure that all pre-K teachers and educational aides meet the licensing requirements pursuant to Hawai'i Administrative Rules (HAR), the Hawai'i Teacher Standards Board (HTSB), and the Hawai'i Department of Health, Mana 'Ulu Montessori Charter Lab School will implement the following processes:

##### 1. Rigorous Hiring Practices:

- **Verification of Credentials:** All applicants will be required to provide official transcripts and documentation verifying their qualifications, including degrees, licenses, and certifications. The school will verify the validity of these credentials with the HTSB, the Hawai'i Department of Health, and relevant institutions.
- **Background Checks:** Thorough background checks, including criminal history and child abuse clearances, will be conducted for all prospective employees to ensure the safety and well-being of students, meeting the requirements of both the HTSB and the Hawai'i Department of Health.
- **Interviews and Demonstrations:** Candidates will undergo interviews with the school administration and potentially lead teachers to assess their understanding of Montessori philosophy, commitment to culturally responsive practices, and alignment with the school's mission and vision. Pre-K teacher candidates may be asked to demonstrate a lesson or activity to showcase their teaching skills.

##### 2. Ongoing Professional Development:

- **Montessori Training:** All pre-K teachers will be required to complete or be actively enrolled in a state-approved Montessori teacher education program, such as the ECE with Montessori Credential Program at Chaminade University in Honolulu, or other recognized programs. Educational aides will receive training in Montessori principles and practices to effectively support the lead teachers and meet the professional development requirements of the Hawai'i Department of Health.
- **HTSB and DHS Compliance:** The school will provide ongoing professional development opportunities to ensure that all pre-K teachers meet the Hawai'i Teacher Standards Board (HTSB) requirements for pre-kindergarten teachers, including required coursework in early childhood education and ongoing professional development hours, as well as meeting licensing requirements and annual training mandates of the Hawai'i Department of Human Services
- **Culturally Responsive Practices:** Professional development will include training on culturally responsive teaching practices, incorporating Hawaiian values, language, and perspectives into the curriculum and classroom environment.

**3. Mentorship and Support:**

- **Mentorship Program:** New teachers will be paired with experienced Montessori mentors to receive guidance, support, and feedback during their initial years.
- **Collaborative Culture:** The school will foster a collaborative culture where teachers can share best practices, observe each other's classrooms, and participate in peer-to-peer learning opportunities.
- **Performance Evaluations:** Regular performance evaluations will be conducted to provide feedback and support for continuous improvement, ensuring that teachers are meeting the school's standards and adhering to licensing requirements of both the HTSB and the Hawai'i Department of Health.

**4. Compliance Monitoring:**

- **Internal Review:** The school administration will conduct regular internal reviews of teacher credentials, professional development records, and classroom practices to ensure compliance with HAR, HTSB, and Hawai'i Department of Health requirements.
- **External Audits:** The school will be subject to external audits by the Hawai'i State Public Charter School Commission to ensure compliance with all applicable regulations, including teacher licensing requirements.

By implementing these processes, Mana ‘Ulu Montessori Charter Lab School will ensure that all pre-K teachers and educational aides meet the highest standards of professionalism and are equipped to provide a high-quality, culturally responsive, and developmentally appropriate learning experience for all students, in full compliance with all relevant state regulations.

**SUBMITTING ATTACHMENTS?**

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 8– Attachment 1, Question 8 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

### QUESTION 9

How does your proposed school's system of assessment inform:

- Instructional practices
- Impact on student outcomes
- Meets the needs of all students (such as English Learners, Students with Disabilities (SWD), at-risk students, and students who are far below or above grade level, and the targeted student population)

### EVALUATION CRITERIA:

*Evidence could include, but is not limited to:*

- *characteristics of Innovative Practices;*
- *characteristics of High-Quality Public Charter Schools-Promoting a Culture of Continuous Learning and Improvement:*
  - o *High quality charter schools use continuous learning and improvement plans for student success. There is a systemization of assessment for student learning that informs school leaders, staff, faculty, and governing boards on instruction and the impact on student learning.*
  - o *Student-focused instructional planning reflects commitment to the school's vision, demonstrates an innovative spirit, and includes strict accountability that all works synchronously to create learning communities embracing a school culture of continuous improvement.*
  - o *School-wide goals and performance indicators for student learning are adopted and measured regularly using the spiral inquiry processes.*
  - o *Data is used to adjust plans as part of a data-driven culture focused on increasing the quality of student work through prevention and intervention.*
- *regularly agendaized governing board updates;*
- *staff data discussions and practices;*
- *ongoing mission and vision related professional developments;*
- *communication with parents regarding student performance, and*
- *MTSS strategies as appropriate.*

### NARRATIVE SECTION:

Mana 'Ulu Montessori Charter Lab School recognizes the importance of remaining at the forefront of innovation in early childhood development and teaching practices. To achieve this, the school will function as a lab/teaching site for adult learners, fostering a culture of continuous professional development and collaboration among its staff.

### Lab/Teaching Site for Adult Learners:

- **Partnerships with Universities:** The school will partner with universities offering early childhood education programs, such as Chaminade University, to provide practicum and internship opportunities for pre-service teachers. This will allow the school to contribute to the development of future educators and stay informed about the latest research and pedagogical approaches.
- **Mentorship Program:** Experienced Montessori teachers will serve as mentors for student teachers and new staff members, providing guidance, support, and opportunities for observation and co-teaching.
- **Professional Development Workshops:** The school will host professional development

workshops and seminars, inviting experts in early childhood education, Montessori pedagogy, and child development to share their knowledge and expertise with staff.

**Continuous Professional Development and Networking:**

- **Conferences and Workshops:** Teachers and staff will be encouraged and supported to attend conferences and workshops related to early childhood education, Montessori practices, and culturally responsive teaching (particularly the National American Montessori Conference).
- **Networking Opportunities:** The school will facilitate networking opportunities with other ECE teachers and schools, both public and private, to foster collaboration, share best practices, and stay informed about innovative approaches here in Honolulu.
- **Study Groups and Peer Observations:** Teachers will participate in study groups and peer observations to deepen their understanding of Montessori principles, reflect on their teaching practices, and learn from each other.

**Ensuring High-Fidelity Montessori Practices:**

- **AMS Affiliation:** The school's affiliation with the American Montessori Society (AMS) will provide access to resources, training, and support to ensure adherence to high-fidelity Montessori practices.
- **Montessori Consultants:** The school will consult with AMS-certified Montessori trainers to receive guidance on curriculum development, classroom design, and teacher practice.
- **Ongoing Self-Reflection:** Teachers will engage in ongoing self-reflection and peer feedback to ensure that their practices align with Montessori principles and meet the needs of all students.

**Comprehensive Assessment System:**

The school's comprehensive assessment system will be used to inform instructional practices, positively impact student outcomes, and meet the diverse needs of all learners. This system includes:

- **Transparent Classroom:** This platform will be used to record observations, track developmental milestones, generate progress reports, and facilitate communication between teachers and parents.
- **Formative and Summative Assessments:** Ongoing formative assessments and periodic summative assessments will provide valuable data to guide instruction and evaluate student learning.
- **Montessori-based Assessments:** These assessments will focus on observing and documenting children's progress in key developmental areas through daily classroom activities.
- **Parent-Teacher Conferences, Student-Led Conferences, and Community-Based Projects:** These additional measures will provide a holistic picture of each child's learning and development.

By functioning as a lab/teaching site for adult learners and prioritizing continuous professional development, our Montessori charter lab school will ensure that its staff remains up-to-date on the latest research and best practices in early childhood education. This commitment to ongoing learning and innovation will benefit students, teachers, and the broader community by fostering a high-quality, dynamic, and responsive learning environment.

**SUBMITTING ATTACHMENTS?**

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 9 – Attachment 1, Question 9 – Attachment 2, etc.*
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### QUESTION 10

Describe the system of accountability that will be developed and implemented for:

- School administrators
- Teachers and Staff

### EVALUATION CRITERIA:

*Response must include:*

- *How will school administrators hold teachers accountable for student success and alignment to its academic program?*
- *Demonstrative understanding of all applicable bargaining units' requirements.*

*Response could include, but is not limited to:*

- *Characteristics of High-Quality Public Charter Schools-Academic Plans Embrace a System of Accountability:*
  - *High quality charter schools' academic plans embrace a comprehensive and effective system of accountability that holds all stakeholders publicly accountable.*
  - *There is a system of internal accountability for monitoring systems that includes academic performance expectations.*
  - *School communities are internally accountable—dedicated to working together to accomplish shared goals, and responding flexibly and quickly when needed.*
  - *High Quality charter schools demonstrate school improvement that is steady.*
    - *Leadership prioritizes improvement and is able to communicate its urgency and monitors short- and long-term goals.*
    - *There is differentiated, targeted support to meet individual needs which use frequent data analysis to inform responses to interventions.*

### NARRATIVE SECTION:

Mana 'Ulu Montessori Charter Lab School will implement a robust accountability system that aligns with the requirements of the Hawaii State Teachers Association (HSTA) bargaining units while ensuring high standards of teaching and learning and reflecting the characteristics of high-quality charter schools.

### Accountability for Teachers:

- **Clear Expectations:** Teachers will receive clear expectations for student performance, curriculum implementation, and professional conduct, outlined in the school's handbook and reinforced through regular communication and professional development. These expectations will be aligned with the HSTA contract, relevant state standards, and the school's commitment to high-fidelity Montessori practices.
- **Comprehensive Evaluation System:** The school will utilize a comprehensive evaluation system that includes:
  - **Formative Assessments:** Ongoing observations, anecdotal records, and feedback on lesson planning and implementation will provide continuous support and guidance for teachers, allowing for timely adjustments and targeted professional development.
  - **Summative Assessments:** Formal evaluations will be conducted annually, incorporating multiple measures of teacher effectiveness, including student performance data, classroom observations, portfolio reviews, and parent feedback. This process will adhere to the HSTA contract guidelines for teacher evaluations.

- **Student Growth:** Student growth will be a significant factor in evaluating teacher effectiveness. The school will use a variety of assessments, including standardized measures and Montessori-specific assessments, to track student progress and measure the impact of teaching practices.
- **Alignment to the Academic Program:** Teachers will be held accountable for implementing the school's high-fidelity Montessori curriculum, incorporating Hawaiian values, and adhering to the school's mission and vision. Regular observations and curriculum reviews will ensure alignment with the academic program.

#### HSTA Requirements:

The school will demonstrate a clear understanding of all applicable HSTA bargaining unit requirements, including:

- **Evaluation Procedures:** Adherence to the HSTA contract guidelines for teacher evaluations, including timelines, notification procedures, and opportunities for teacher input and response.
- **Just Cause:** Any disciplinary actions or dismissals will be based on just cause and follow due process procedures outlined in the HSTA contract.
- **Professional Development:** Provide teachers with adequate time and resources for professional development, including opportunities to attend conferences, workshops, and engage in collaborative learning activities.
- **Working Conditions:** Maintain a safe and supportive working environment for all teachers, adhering to HSTA contract provisions regarding workload, class size, and other working conditions.
- **Grievance Procedures:** Establish clear grievance procedures for teachers to address concerns or disputes, ensuring fair and timely resolution in accordance with the HSTA contract.

#### Characteristics of High-Quality Charter Schools in Hawaii:

The accountability system will reflect the characteristics of high-quality charter schools by:

- **Embracing a Comprehensive System of Accountability:** The system will hold all stakeholders, including administrators, teachers, staff, and the governing board, accountable for student success and school improvement.
- **Internal Accountability for Monitoring Systems:** The school will establish internal mechanisms for monitoring student performance, teacher effectiveness, and program implementation. This will include regular data analysis, classroom observations, and curriculum reviews.
- **School Community Collaboration:** The school will foster a collaborative culture where all stakeholders are dedicated to working together to accomplish shared goals, responding flexibly and quickly to address challenges and support student needs.
- **Continuous Improvement:** The leadership will prioritize continuous improvement, communicating its urgency and monitoring short- and long-term goals. Differentiated and targeted support will be provided to meet individual needs, using frequent data analysis to inform interventions and ensure progress.

#### Collaboration and Support:

The school recognizes that accountability is most effective when combined with support and collaboration. Therefore, the school will:

- **Provide Mentorship and Coaching:** Offer mentorship and coaching opportunities for teachers to enhance their skills, receive feedback, and improve their practice.



- **Foster a Collaborative Culture:** Encourage collaboration among teachers through regular meetings, professional learning communities, and peer observation opportunities.
- **Promote Continuous Improvement:** Create a culture of continuous improvement where teachers are encouraged to reflect on their practice, seek feedback, and engage in ongoing professional development.

By implementing this comprehensive accountability system, our Montessori charter lab school will ensure high-quality teaching, promote student success, and foster a positive and productive working environment for all staff, while adhering to HSTA requirements and embodying the characteristics of high-quality charter schools.

**SUBMITTING ATTACHMENTS?**

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 10 – Attachment 1, Question 10– Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

**FACILITIES and FINANCIALS OVERVIEW:** The following questions seek to clarify the proposed school's governing board's understanding and knowledge of required financial practices that are involved in running a financially viable and sustainable charter school in the state of Hawai'i.

**QUESTION 11**

Have facilities been identified and/or secured? If so, provide a description of the facility and the rationale behind the selection of the facility. If applicable, add the specific location of the secured facility.

**EVALUATION CRITERIA:**

*Response must include, but is not limited to:*

- *evidence that the facility supports the implementation of the proposed academic program (location, building type, etc.); and*
- *description of the impact on the school's budget.*

**NARRATIVE SECTION:**

The charter lab school is thrilled to be located and operate concurrently with an established private. This well-established preschool and kindergarten, serving the Honolulu-O'ahu community since 1982, provides a purpose-built environment that strongly supports the implementation of the charter school's proposed academic program.

**Evidence of Facility Support for the Academic Program:**

- **Authentic Montessori Environment:** The private site offers an established Montessori environment, complete with:
  - **Spacious classrooms:** Designed to accommodate various learning areas and the full range of Montessori materials for preschool children.
  - **Outdoor learning spaces:** Including a playground and natural areas for exploration and play, essential for the charter school's emphasis on outdoor learning, gardening, and connection to nature.
  - **Dedicated learning areas:** The School features designated spaces for practical life activities, sensorial exploration, language development, and cultural learning, all crucial components of the charter school's curriculum.
- **Alignment with School Values:** The School's commitment to high-quality early childhood education, community service, and the Montessori philosophy strongly aligns with the proposed charter school's mission and vision.
- **Accreditations and Affiliations:** The School's accreditations from the American Montessori Society (AMS) and the National Association for the Education of Young Children (NAEYC) demonstrate its adherence to high standards and best practices, further supporting the charter school's commitment to quality.

**Impact on the School's Budget:**

Utilizing the existing facilities with a licensed private provider will have a significant positive impact on the school's budget:

- **Reduced Start-up Costs:** Eliminates the need for costly renovations or construction of a new facility, freeing up funds for other essential resources like Montessori materials, technology, and teacher training.
- **Lower Operating Expenses:** Sharing facilities with the Lab School could potentially reduce operating expenses related to rent, utilities, and maintenance.
- **Resource Allocation:** The cost savings can be allocated to support the implementation of the academic program, including:
  - **Hiring qualified Montessori teachers:** Attracting and retaining experienced educators.
  - **Purchasing high-quality Montessori materials:** Providing students with authentic learning materials.
  - **Implementing "farm-to-school" initiatives:** Developing a school garden and partnering with local farms.
  - **Providing professional development opportunities:** Supporting ongoing teacher training and continuous improvement.

By leveraging the existing infrastructure and resources of an existing private school, Mana 'Ulu Montessori Charter Lab School will maximize its budget to provide a rich and impactful learning experience for all students. This strategic decision ensures that resources are directed towards the core elements of the academic program, ultimately benefiting the children and families the school serves.

**SUBMITTING ATTACHMENTS?**

☒ NO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 11 – Attachment 1, Question 11 – Attachment 2, etc.*
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**QUESTION 12**

Provide a budget and staffing plan (see Exhibit 7) for years 0-2.

**EVALUATION CRITERIA:**

*Budget must be provided on a Microsoft excel sheet.*

*If you are providing a slow growth model, the proposed budget must be reflective of that model.*

**NARRATIVE SECTION:**

A mixed delivery program will operate from an existing privately licensed preschool. Partnering with an existing provider maximizes staffing and resource allocation. The private space is DHS licensed for a total of 36 children allowing both the charter and private program to co-exist in the same space.

**Staffing:**

2 teachers (1 lead and 1 assistant) employed by the private provider and 2 teachers (1 lead and 1 EA) employed by the charter program will provide a total of 4 staff members for 36 children. In addition, the private program is able to accept student interns to work with the private staff..

**Resource:**

Working with a private provider will offer extended hours, past a normal school day, for families that may need additional care past 2pm for a monthly charge. The monthly fee will be paid directly to the private provider and give a family the option of a full day program.

**SUBMITTING ATTACHMENTS?**

☐ NO. There is no attachment submitted for this question.

☒ YES. There are attachment(s) submitted for this question.

2 number of attachments submitted.

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 12 – Attachment 1, Question 12 – Attachment 2, etc.*
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	Private Pay (16)	Charter (20)			Private Pay (20)	Charter (16)
Tuition (\$1500/month)	\$240,000.00	\$0.00			\$300,000.00	\$0.00
Summer (30 students @ \$1500/month)	\$45,000.00	\$0.00			\$45,000.00	\$0.00
Comp Fees	\$4,800.00	\$6,000.00			\$6,000.00	\$4,800.00
Reg Fee	\$2,000.00	\$2,500.00			\$2,500.00	\$2,000.00
Before & Afterschool (Charter only; 15 or 12 students * \$400/mo * 10mo)	\$60,000.00	\$0.00			\$48,000.00	\$0.00
Charter Allocation	\$0.00	\$171,000.00			\$0.00	\$171,000.00
Total Rev	\$351,800.00	\$179,500.00			\$401,500.00	\$177,800.00
Total Rev Private + Charter	\$531,300.00				\$579,300.00	
Staff - Salary ( Private = Admin + Teacher + Aide) (Charter = Teacher + EA)	\$192,792.00	\$97,800.00			\$192,792.00	\$97,800.00
Non benefit eligible Admin (for Charter)		\$11,000.00				\$11,000.00
Staff - Hourly Wages (Student Intern)	\$15,600.00	\$0.00			\$15,600.00	\$0.00
Fringe Benefits Allocation	\$50,126.00	\$58,680.00			\$50,126.00	\$58,680.00
Office Supplies	\$1,000.00	\$500			\$1,000.00	\$500
Instructional Supplies	\$5,000	\$5,000			\$5,000	\$5,000
Janitorial Supplies	\$2,000	\$2,000			\$2,000	\$2,000
Outside Services	\$4,000.00	\$0.00			\$4,000.00	\$0.00
Postage & Shipping	\$100.00	\$0.00			\$100.00	\$0.00
Subscriptions	\$3,750.00	\$750.00			\$3,750.00	\$750.00
Electricity	\$5,500.00	\$0.00			\$5,500.00	\$0.00
Water & Sewer	\$1,500.00	\$0.00			\$1,500.00	\$0.00
General Maintenance	\$4,500.00	\$0.00			\$4,500.00	\$0.00
Promotion	\$3,000.00	\$0.00			\$3,000.00	\$0.00
Food (Charter + Private)	\$11,000.00	\$0.00			\$11,000.00	\$0.00
Professional Development (Charter + Private)	\$9,000.00	\$0.00			\$9,000.00	\$0.00
Staff Travel (Private)	\$8,000.00	\$0.00			\$8,000.00	\$0.00
Student Activities	\$8,000.00	\$1,000.00			\$8,000.00	\$1,000.00
Capital Equip & Assets (over \$5,000)	\$0.00	\$0.00			\$0.00	\$0.00
Instructional Materials (Montessori)	\$5,000.00	\$2,000.00			\$5,000.00	\$2,000.00
Total Exp	\$329,868.00	\$178,730.00			\$329,868.00	\$178,730.00
Total Exp Private + Charter	\$508,598.00				\$508,598.00	

Net Assets	\$21,932.00	\$770.00			\$71,632.00	-\$930.00
Net Assets Private + Charter	\$22,702.00				\$70,702.00	
	split net rev 50/50 -5% charter admin				split net rev 50/50 -5% charter admin	

Based on 10 month SY and 1 month Summer						
	Private Pay (18)	Charter (18)				
Tuition (\$1500/month)	\$270,000.00	\$0.00				
Summer (30 students @ \$1500/mo)	\$45,000.00	\$0.00				
Comp Fees (\$300/yr)	\$5,400.00	\$5,400.00				
Reg Fee (\$125/yr)	\$2,250.00	\$2,250.00				
Before & Afterschool (Charter only; 15 or 12 students * \$400/mo * 10mo)	\$60,000.00	\$0.00				
Charter Allocation	\$0.00	\$171,000.00				
Total Rev	\$382,650.00	\$178,650.00				
Total Rev Private + Charter	\$561,300.00					
Staff - Salary ( Private = Admin + Teacher + Aide) (Charter = Teacher + EA)	\$192,792.00	\$97,800.00				
Non benefit eligible Admin (for Charter)		\$11,000.00				
Staff - Hourly Wages (Student Intern)	\$15,600.00	\$0.00				
Fringe Benefits Allocation	\$53,981.76	\$62,592.00				
Office Supplies	\$1,000.00	\$500				
Instructional Supplies	\$5,000	\$5,000				
Janitorial Supplies	\$2,000	\$2,000				
Outside Services	\$4,000.00	\$0.00				
Postage & Shipping	\$100.00	\$0.00				
Subscriptions	\$3,750.00	\$750.00				
Electricity	\$5,500.00	\$0.00				
Water & Sewer	\$1,500.00	\$0.00				
General Maintenance	\$4,500.00	\$0.00				
Promotion	\$3,000.00	\$0.00				
Food (Charter + Private)	\$12,000.00	\$0.00				
Professional Development (Charter + Private)	\$9,000.00	\$0.00				

Staff Travel (Private)	\$8,000.00	\$0.00				
Student Activities	\$8,000.00	\$1,000.00				
Capital Equip & Assets (over \$5,000)	\$0.00	\$0.00				
Instructional Materials (Montessori)	\$5,000.00	\$2,000.00				
Total Exp	\$334,723.76	\$182,642.00				
Total Exp Private + Charter	\$517,365.76					
Net Assets	\$47,926.24	-\$3,992.00				
Net Assets Private + Charter	\$43,934.24					
Private (45% of Net Asset) * Not including Application Fees	\$19,770.41					
Non-Profit (55% of Net Asset)	\$24,163.83					



### Staffing Chart

Use the appropriate table below to outline the staffing plan for the proposed school. Adjust or add functions and titles and add or delete rows as needed. Include the salary and full-time employee (“FTE”) equivalency (e.g., 1.0 FTE, 0.5 FTE, etc.) for each position for each year.

#### Pre-K Staffing Model and Rollout

Salary and FTE Per Position Per Year						
Title	Year 1 2026	Year 2 2027	Year 3 2028	Year 4 2029	Year 5 20 ____	Capacity 20 ____
School Director/Manager/School Operations Support Staff	0.25 FTE	0.25 FTE	0.25 FTE	0.25 FTE	0.25 FTE	
Classroom Teachers: Montessori credential and PK/K or PK-3 licensed	1.0 FTE	1.0 FTE	1.0 FTE	1.0 FTE	1.0 FTE	
Educational Assistants	1.0 FTE	1.0 FTE	1.0 FTE	1.0 FTE	1.0 FTE	
Other: Student Interns (Montessori and/or PK licensure)			1.0 FTE or 2 - 0.5	1.0 FTE or 2 - 0.5	1.0 FTE or 2 - 0.5	
Total Positions	2.25 FTE	2.25 FTE	2.25 FTE	2.25 FTE	2.25 FTE	
Total Salaries						

**QUESTION 13**

If the proposed school is approved, state funding will not be provided for the pre-opening/pre-contracting period. Explain how the funds needed during the pre-opening/pre-contracting period will be provided. Include and describe:

- The amount of funding the proposed school requires during the pre-opening period;
- What these funds will be spent on; and
- Plans for fundraising and what potential sources of funding will be sought.

**EVALUATION CRITERIA:**

*Evidence could include, but not necessarily solely consist of fundraising efforts and grant support.*

- *Detailed spreadsheet outlining expected preopening costs which include personnel, recruitment, advertising, and supplies.*
- *Time frame the applicant school would expect funds to be encumbered*
- *Detailed plan outlining fundraising goals including:*
  - *Amounts to be requested*
  - *Any amounts secured delineated into pledges, grants and donations*
- *Evidence of letters sent AND any acceptance letters including the amount pledged*

**NARRATIVE SECTION:**

We understand that state funding will not be available during the pre-opening/pre-contracting period. However, the school's strategic decision to utilize the existing facilities with an already established private school will significantly reduce pre-opening costs and allow for efficient allocation of resources. This, combined with a proactive fundraising plan, will ensure the school can cover essential start-up expenses.

**Reduced Start-up Costs:**

By leveraging the existing infrastructure at Chaminade University, the school eliminates the need for costly renovations or construction of a new facility. This significantly reduces start-up costs, freeing up funds for other essential resources, such as:

- **Montessori materials:** Purchasing authentic, high-quality Montessori materials to create a rich and engaging learning environment.
- **Technology and equipment procurement prior to opening:** Investing in technology infrastructure, including computers, tablets, software, and classroom equipment.
- **Teacher training prior to opening:** Providing comprehensive pre-opening training for teachers and staff on Montessori pedagogy, culturally responsive practices, and the school's specific curriculum.

**Lower Operating Expenses:**

Sharing facilities with the established School will reduce ongoing operating expenses related to rent, utilities, and maintenance. This allows the school to allocate more resources directly to the academic program and student support services.

**Resource Allocation:**

The cost savings achieved through a partnership with Chaminade University will be strategically allocated

to support the implementation of the academic program, including:

- **Hiring qualified Montessori teachers:** Attracting and retaining experienced and certified Montessori educators.
- **Purchasing high-quality Montessori materials:** Providing students with authentic learning materials that support their development across all areas.
- **Implementing "farm-to-ece" initiatives:** Developing a school garden, partnering with local farms, and providing nutrition education.
- **Providing professional development opportunities:** Supporting ongoing teacher training and continuous improvement to ensure high-quality instruction.

**Fundraising Plan:**

The non-profit will implement a multi-faceted fundraising plan to secure the required pre-opening funds, including seeking grants, organizing community fundraising events, soliciting individual donations, pursuing corporate sponsorships, and utilizing crowdfunding platforms.

During the first year, we will structure an "annual giving" campaign to support student learning, Montessori supplies and teacher professional learning.

By strategically managing its budget and leveraging the resources available through the partnership with the private provider, the charter lab school can maximize its impact and provide a rich and impactful learning experience for all students. This approach ensures that resources are directed towards the core elements of the academic program, ultimately benefiting the children, families and the school.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 13 – Attachment 1, Question 13 – Attachment 2, etc.*
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**QUESTION 14**

Describe what the budgetary priorities are and how it supports the school's mission and vision for the first two years of operation. Highlight and explain any changes in priority from year to year.

**EVALUATION CRITERIA:**

*The answer should connect to and build off of Question 14 above. Response should outline the connection of the per pupil amount and expenses as they relate to school operations (mission, vision)*

*Evidence could include, but not necessarily solely consist of:*

- *Examples would include the clear development of a financially sustainable charter school - governance monitoring, seeking financial support, planning purchases, etc.*

*Review HRS 302D-28 to better understand charter school funding.*

**NARRATIVE SECTION:**

Our Montessori charter lab school is committed to not only providing a high-quality educational program but also to establishing a financially sustainable model for long-term success. The School recognizes the importance of recruiting and retaining highly qualified and trained teachers. Investment in school personnel development is a priority in being able to offer a quality developmentally appropriate program. This commitment will be reflected in its budgetary priorities and proactive financial management strategies.

**Budgetary Priorities and Financial Sustainability:**

The school's budgetary priorities will be directly linked to its mission and vision, ensuring that resources are strategically allocated to support:

- **High-Quality Staff and Professional Development:** Investing in highly qualified Montessori teachers, and developing a comprehensive curriculum that integrates Montessori with Hawaiian values and sustainability principles.
- **Community Engagement:** Building strong relationships with families and the community through outreach, partnerships, and culturally responsive practices.
- **Continuous Improvement:** Prioritizing ongoing professional development for teachers, maintaining authentic Montessori materials, and program evaluation to ensure continuous improvement and responsiveness to student needs.

**Financial Sustainability Strategies:**

The school will implement proactive financial management strategies to ensure long-term sustainability:

- **Governance Monitoring:** The governing board will actively monitor the school's financial health, reviewing budgets, financial reports, and ensuring compliance with all applicable regulations (particular adherence to Chaminade University).
- **Fundraising and Development:** The school will develop a comprehensive fundraising plan to secure additional resources beyond state funding. This will include seeking grants, organizing community events, and cultivating relationships with donors and sponsors.

- **Strategic Planning and Purchasing:** The school will engage in careful planning for all purchases, prioritizing essential resources and seeking cost-effective solutions.
- **Reserve Funds:** The school will establish and maintain reserve funds to address unexpected expenses and ensure financial stability during periods of economic uncertainty.
- **Grant Writing and Management:** The school will dedicate resources to grant writing and management to secure funding for specific programs, initiatives, and professional development opportunities.

**Connecting Per Classroom Amount to Operations:**

The per classroom amount (\$171,000) received by the charter school will be carefully managed to maximize its impact and support the school's mission and vision:

- **Prioritizing Direct Student Services:** The majority of the per pupil funding will be allocated to direct student services, such as teacher salaries, classroom materials, and professional development..
- **Minimizing Administrative Costs:** Administrative costs will be kept as low as possible to maximize the resources dedicated to student learning and well-being.
- **Transparency and Accountability:** The school will maintain transparency in its budgeting practices and provide regular financial reports to the governing board and the community.

**Year 1 (SY 2025-26) and Year 2 (SY 2026-27) Priorities:**

The school's budgetary priorities will evolve over the first two years of operation:

- **Year 1:** Focus on essential start-up needs, including attracting qualified teachers, acquiring Montessori materials, and developing the curriculum.
- **Year 2:** Shift towards ongoing professional development, technology integration, and program evaluation to ensure continuous improvement and long-term sustainability.

By implementing these strategies and maintaining a focus on financial sustainability, our charter school will ensure its ability to provide a high-quality, sustainable, and impactful educational program for the community for years to come.

**SUBMITTING ATTACHMENTS?**

☒ **XNO.** There is no attachment submitted for this question.

☐ **YES.** There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 14 – Attachment 1, Question 14 – Attachment 2, etc.*
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**QUESTION 15**

Describe the internal fiscal management oversight systems that will be developed and implemented.

**EVALUATION CRITERIA:**

*Evidence must include:*

- *processes and practices that will ensure and monitor fiscal solvency and employ checks and balances;*
- *description of the specific members and the process used by the applicant governing board to develop and implement the fiscal oversight system; and*
- *identify specific people/positions and explain their oversight duties and responsibilities.*

*Evidence could include, but not necessarily solely consist of:*

- *reference to Characteristics of High Quality of Charter Schools;*
- *examples citing the process of monitoring financial risk; and*
- *evidence of governing board experience in setting up sound financial systems including processes, policies and checks and balances.*

**NARRATIVE SECTION:**

We are committed to establishing a financially sustainable model that leverages the benefits of a mixed delivery system, co-locating within the site of an existing licensed preschool provider.. This unique partnership allows the charter school to maximize resources, reduce costs, and enhance the quality of its program while maintaining financial stability.

**Internal Fiscal Management Oversight within a Mixed Delivery System:**

The school will implement robust internal fiscal management oversight systems, specifically tailored to the context of a mixed delivery model:

**1. Collaborative Budgeting:**

- **Joint Planning:** The charter school administrator will collaborate with the Lab School administration to develop a joint budget that outlines shared expenses and individual program costs. This will ensure transparency and efficient resource allocation.
- **Shared Resource Allocation:** The budget will clearly delineate how shared resources, such as facilities, utilities, and any staffing overlap, will be allocated and funded by each program.
- **Separate Accounting:** Maintain separate accounting systems for the charter school and the Lab School to track individual program expenses and ensure compliance with funding regulations.

**2. Financial Reporting and Transparency:**

- **Combined Financial Statements:** In addition to individual program statements, the school will generate combined financial statements that provide a comprehensive overview of the financial health of the mixed delivery system.
- **Joint Reporting:** Regular financial reports will be provided to both the charter school governing board and the relevant private provider authorities, ensuring transparency and accountability for both entities.

**3. Memorandum of Understanding (MOU):**

- **Clear Agreement:** A detailed MOU will be established between the charter school and partner provider, outlining the terms of the partnership, financial responsibilities, and shared resource allocation.
- **Regular Review:** The MOU will be reviewed and updated periodically to reflect any changes in the programs or financial arrangements.

**4. Fundraising and Grant Management:**

- **Joint Fundraising Opportunities:** Explore opportunities for joint fundraising initiatives that benefit both the charter school and the private provider, leveraging the strengths and resources of both entities.
- **Grant Collaboration:** Collaborate on grant applications that support shared goals and initiatives, such as professional development for teachers or facility upgrades that benefit both programs.

**5. Cost-Sharing and Efficiency:**

- **Maximize Resource Utilization:** Identify opportunities for cost-sharing and maximizing resource utilization, such as joint purchasing of materials, shared technology resources, and collaborative professional development initiatives.
- **Negotiated Agreements:** Negotiate favorable agreements with vendors and service providers to leverage the combined purchasing power of both programs.

**Benefits for Financial Sustainability:**

This mixed delivery model offers significant benefits for the financial sustainability of the charter school:

- **Reduced Start-up Costs:** Eliminates the need for costly renovations or construction of a new facility.
- **Lower Operating Expenses:** Sharing facilities and resources reduces ongoing expenses.
- **Increased Funding Opportunities:** Collaboration with a private provider opens doors for joint fundraising and grant opportunities.
- **Enhanced Program Quality:** Access to shared resources and expertise enhances the quality of the educational program without increasing costs.

By implementing these internal fiscal management oversight systems and leveraging the benefits of the mixed delivery model, the Mana 'Ulu Montessori Charter Lab School will ensure financial stability, transparency, and accountability. This strategic approach will support the school's mission of providing a high-quality and sustainable Montessori education for the community.

**SUBMITTING ATTACHMENTS?**

☐ NO. There is no attachment submitted for this question.

☒ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

1 attachment submitted

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 15 – Attachment 1, Question 15 – Attachment 2, etc.*
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## INTERNAL CONTROL STRUCTURE

### Mana Ulu Montessori Charter Lab School

This document describes the policies and procedures of Mana Ulu Montessori Charter Lab School. The policies are designed to safeguard the assets of the school, facilitate compliance with applicable law, and produce timely and accurate financial information in accordance with the Generally Accepted Accounting Principles (GAAP), and rules and regulations of the Financial Accounting Standards Board (FASB).

Additionally, all policies and procedures were reviewed for adherence to the State of Hawaii, and the responsibility of the finance team to safeguard the school's assets, which include cash, cash equivalents, and fixed assets. The contents of this chapter will demonstrate the internal controls that will be/have been implemented to assure assets are safeguarded appropriately. The internal control structure for fiscal management is composed of four basic elements, described in detail below:

#### **Internal Control Environment**

The internal control environment reflects the importance Mana Ulu Montessori Charter Lab School places on internal controls as part of its day-to-day activities. Factors that impact the internal control environment can include management and Board philosophy; organizational structure; ways of assigning authority and responsibility; methods of management and control; personnel policies and practices; and external influences such as significant donor expectations.

#### **Accounting System**

Mana Ulu Montessori Charter Lab School has established an accounting system consisting of the methods used to identify, assemble, classify, record and report accounting transactions. The methods are set up to: (1) identify and record all of the organization's transactions; (2) describe the transactions in enough detail to allow classification for financial reporting, and (3) indicate the time period in which transactions occurred in order to record them in the proper accounting period. The fiscal year is from July 1st to June 30th. The school's audited financial statements must be approved by the governing board and provided to the appropriate oversight entity according to all applicable requirements by March 31st. Furthermore, the school's budgets for the following fiscal year must be drafted for Board and Authorizer review by May 10th, and approved by July 31st of the current fiscal year. The budget may later be revised and approved as necessary.

#### **Internal Control Procedures**

Mana Ulu Montessori Charter Lab School has adopted a number of internal financial controls. These procedures are set up to strengthen Why Not You Academy's internal control structure in order to safeguard the organization's assets. The internal financial controls consist of the Following:

- Segregation of Duties: A hierarchical structure of authority and responsibility has been developed at Mana Ulu Montessori Charter Lab School. Tasks are divided and allocated

to guard against one individual having the ability to make an accounting mistake (either knowingly or unknowingly). This protects the school from any potential fraud or misappropriation of funds. In situations where there are an insufficient number of employees to achieve this because of budget constraints, a compensating control has been created at the school.

- Organizational Chart:
  - Director: Reviews and approves all budgets; approves major capital expenses; approves staffing changes; approves compensation changes; approves all purchase orders and disbursements; completes investments; coordinates hiring.
  - Director of Operations: provides input into budgets; supports hiring; responsible for staying within budget; reviews all purchase orders; ensures fiscal policies and procedures are being followed; orders school supplies for teachers and procures other items for the school as necessary; creates check requests and purchase orders and obtains Director approval as necessary; sends all invoices to the Accountant, with the proper approvals. Also, collects and deposits funds from students/parents. Operations also ensures fiscal policies and procedures are being followed; enters journal entries as needed; completes bank reconciliations; prepares all financial reports; enters all invoices; cuts checks and prepares various EFT payments; mails checks.
- Restricted Access: Physical access to valuable and moveable assets is restricted to authorized personnel.
- Document Control: In order to ensure that all documents are captured by the accounting system, all documents must be initiated and dated when received and then filed appropriately.
- Records Retention: To provide an accurate and auditable record of all financial transactions, the school's books, records, and accounts are maintained in conformity with generally accepted accounting principles as required by Hawaii law, applicable to charter schools. Records will be maintained for the periods sufficient to satisfy IRS regulations, federal grant requirements, charter school commission audit requirements, if applicable, and other legal needs as may be determined. Non- profit organization record retention requirements are reviewed annually.
- Processing Controls: These are designed to identify any errors before they are posted to the general ledger. Common processing controls are the following: (1) Source document matching; (2) Clerical accuracy of documents; (3) General ledger account code checking; and (4) budget authority.
- Reconciliation Controls: These are designed to identify any errors after transactions have been posted and the general ledger has been run. The process involves reconciling selected general ledger control accounts to subsidiary ledgers. Reconciliation is completed quarterly by the director of operations-support and reviewed by the director. The reconciled accounts include: Accounts receivable, Prepaids, Accrued payables/liabilities, and others.

- Audits: Mana Ulu Montessori Charter Lab School shall comply with all audit obligations imposed by law, but not limited to, audit requirements of the State Auditor's Office, audit requirements for non-profit corporations, and those imposed by the Charter authorizing authority, currently the Hawaii State Charter School Commission. Mana Ulu Montessori Charter Lab School, financial statements are currently audited annually by an independent audit firm selected by the governing board on the recommendation of the Finance Committee, as allowed by the State Auditor's Office and the Charter Contract.
- Security of Financial Data: The school's accounting software is accessible only to the director and the Accountant. Individual ID codes and passwords are in place for every user with limits on their access and functionality depending on their role within the school. All other hard copies of financial data, when not in use, will be secured in a closet or cabinet at the school.

### **The Accounting Cycle**

The accounting cycle is designed to accurately process, record, summarize, and report the transactions of Mana Ulu Montessori Charter Lab School. Mana Ulu Montessori Charter Lab School will maintain their accounting records and related financial reports on the accrual basis of accounting. Under the accrual basis of accounting, revenues are recognized when earned and expenses are recognized when services are incurred or goods are received. The component bookkeeping cycles fall into one of five primary functions:

1) Revenue, Accounts Receivable and Cash Receipts. Key tasks in this area include:

- Processing cash receipts
- Making deposits
- Recording cash receipts in the general ledger and subsidiary records
- Performing month-end reconciliation procedures
- Processing general ledger integration for private donations/revenue
- Recording revenue into the proper school sites based on State payment remittances

2) Purchases, Accounts Payable and Cash Disbursements Key tasks in this area include:

- Authorizing the procurement of goods and/or services
- Processing purchases (credit card, check, reimbursement)
- Processing invoices
- Issuing checks and wires
- Recording checks in the general ledger and in cash disbursement journals
- Performing month-end reconciliation procedures
- Year-end reporting: Preparing 1099 forms

3) Payroll An outside service provider will perform the payroll process. Their responsibilities include calculating appropriate amounts for taxes to be remitted to the Federal, State and City government agencies and voluntary and/or statutory deductions that may or may not require remittance to retirement plan Directors, child support agencies, etc. Key tasks in this area include:

- Obtaining and gathering payroll information

- Preparing payroll checks and depositing payroll taxes
- Submitting information to accountant for processing
- Performing quarterly reconciliation
- Preparing quarterly, monthly, and annual payroll tax returns
- Preparing W-2s, the W-3, and other annual payroll tax returns

4) General Ledger and Financial Statements. Key tasks in this area include:

- Preparing monthly journal entries
- Reconciling bank accounts and other general ledger accounts
- Reviewing general ledger activity and posting adjusted journal entries
- Producing the financial statements
- Producing the annual budget
- Reviewing budget to actual financial statements

The general ledger process consists of posting the period's transactions to QuickBooks Online (QBO, the accounting software), which produces the financial statements. The Accountant will reconcile bank and credit card accounts, review payroll, review the general ledger and help prepare for the annual audit.

The Director, with support from the accountant, will present monthly statements to the governing board at each board meeting. The required statements are outlined in the following Section. The director, with support from the accountant, is responsible for creating and updating 4-year budget projections for the school. In addition, the director, with support from accountant, will prepare the annual operating budget of income and expenses and the capital budget for the school. These budgets and the 4-year projection are reviewed and approved annually, first by the director and operations, then by the governing board and modified as necessary, with approval by the last day of the closing fiscal year. This process is described below.

General ledger accounts are to be reconciled quarterly by the Accountant and reviewed by the director. At the end of every fiscal year, general ledger reconciliations must be prepared to the auditors, the ledgers must list all transactions that make up the amount on the balance sheet. The list must include vendor or grantee name, amount, date, and a description.

## 5) Budgets and Financial Reporting

### Budgets

Budgets are created annually and revised once or twice, if necessary, based on current expenditures and any other changes that occur after the original budget was approved. Creation of the annual operating budget and capital budget is an iterative process led by the CEO, with support from JGP, but requires input from the Director of Operations, CAO, and others. This input is necessary to ensure enrollment is accurately represented per the charter agreement, and to make certain the staff can properly support the proposed number of enrolled students. Critical school program expenses should be represented in the budgets to ensure reality is properly reflected.

Historical information is used when available and applicable. The iterative process is repeated until the overall budget fairly represents the revenues and expenses for the operating budget as well as the cash requirements for capital expenditures under the

capital budget.

State revenues are estimated by using Form F-203, Estimate for State Revenues. The data may be revised until the budget is adopted. The information supplied on Form F-203 is combined with other data and is used to estimate each district's state-funded allocations for each fiscal year.

Once complete, the CEO presents the overall budget to the Finance Committee for review. If/when the Committee is satisfied, the budget is then presented to the entire Board for a vote of approval. The budget must be approved and passed by August 31st before the start of the new fiscal year. Once approved, the implementation of, and accountability for, the budget is the responsibility of the CEO, the CAO, and the Director of Operations. The proposed budget must be submitted to the Commission by July 10th, if changes are made after July 10th, those must be communicated to the Commission by August 31st.

Upon completion of the budget, Why Not You Academy shall publish a notice in accordance with RCW 28A.505.050 stating: That the district has completed the budget. That the budget is on file at the school. That a copy of the budget will be furnished to any person requesting one. That the board of directors will meet for the purpose of fixing and adopting the budget of the district for the ensuing fiscal year. The date, time, and place of the board hearing which shall occur no later than August 31 for Charter Schools. That any person may appear at the public hearing and be heard for or against any part of the budget. Notice of public meetings shall be published at least once each week for two consecutive weeks in a newspaper of general circulation in the district

Additionally, each fiscal year, the district's adopted official budget document (Form F-195 and F195F), shall be submitted in the format prescribed by the Charter School Commission.

After approval, the Accountant uploads the budget into the accounting system. This budget is then used to run monthly budget vs. actual expense reports that are shared with the school sites. From a day-to-day operational standpoint, the CEO and Director of Operations may work with the Finance Committee, the Chairperson of the Board of Directors, or others, to resolve questions or issues related to the budget.

In addition, internal monthly budget vs. actual reports for the operating budget and capital budget will be produced by the director (third party service provider) by the 20th of each month. Forecasts are updated during this process, if an expense or revenue appears to be tracking off budget the director will update forecasts and communicate this information to the director. An action plan will be implemented by the director (with third party service provider), if necessary and communicated to the school if any spending cuts are needed, or if extra funding has become available. The director has control over spending cuts, but these can be mandated by the Board.

**GOVERNANCE OVERVIEW:** The following questions seek to understand the genesis of the proposed school’s governing board, their processes and skill sets that have brought them together with a goal of establishing a high-quality charter school in the state of Hawai‘i.

**QUESTION 16**

Explain how your governing board has the relevant skills, knowledge, and ability to develop, startup and operate a charter school in your school community.

Each applicant governing board member must complete and sign the form and attach resumes for all applicant governing board members (see Exhibit 6 Applicant Governing Board Member Information Form in the Application).

**EVALUATION CRITERIA:**

*Evidence must include:*

- *list of all applicant governing board members (first name, last name, and role); and*
- *each applicant governing board member must complete and sign the form and attach resumes for all applicant governing board members (see Exhibit 2 Applicant Governing Board Member Information Form in the Application).*

*Evidence should include, but is not limited to:*

- *clear alignment to Characteristics of High Quality Charter schools; and*
- *evidence referencing applicable statutes.*

**NARRATIVE SECTION:**

Per HRS 302D-12, in selecting governing board members, consideration shall be given to persons who (1) provide the governing board with a diversity of perspective and a level of objectivity that accurately represents the interests of the charter school students and the surrounding community, (2) demonstrate an understanding of best practices of nonprofit governance; and (3) possess strong financial and academic management and oversight abilities, as well as human resource and fundraising experience. Hale o Kamali‘i has assembled a governing school board which not only reflects these considerations, but also a governing school board that brings a demonstrated passion for early childhood education. Each member of the GSB will be described here:

- Scott T. Nishimoto is the Co-Executive Director of a Hawai‘i-based 501(c)(3) nonprofit organization called Ceeds of Peace. For the past 6 years, he has overseen a team who focuses on training and programming in the areas of peacebuilding, social emotional learning, restorative practices, community school development, and youth activism. In this role, he is also tasked to lead and manage all operations, fundraising, communications, and strategy for the organization. Scott has also served as a nonprofit consultant to organizations including East-West Center and Abilities Unlimited. Scott has served on a number of nonprofit boards, including the ACLU of Hawai‘i and Pacific Buddhist Academy.
- Dana Ciacchi is a longtime early childhood advocate. She currently serves as the Early Childhood Food Access Networking project manager with Hawaii Public Health Institute. In her current role Dana advocates for ECE across multiple sectors. She has worked in multiple ECE settings, both public and private throughout her career. She is a former CLASS observer and is an active member on ECAS Team 3.
- Andrea Blackwell is currently the Elementary Coordinator and 9-12 teacher at Montessori Community School. She is a PhD candidate at the University of Hawaii focusing her work on international Montessori education. She is a research consultant with the American Montessori

<p>Society and a Montessori Teacher Trainer with Montessori Education Center of the Rockies.</p> <p><b>SUBMITTING ATTACHMENTS?</b></p> <p><input type="checkbox"/> NO. There is no attachment submitted for this question.</p> <p><input checked="" type="checkbox"/> YES. There are attachment(s) submitted for this question.</p> <p>Select # of attachments number of attachments submitted.</p> <p>5 attachments submitted</p> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li>• <i>Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 16 – Attachment 1, Question 16 – Attachment 2, etc.</i></li> <li>• <i>Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.</i></li> </ul>
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**Dana J. Ciacchi**



Committed early childhood professional seeks to contribute to the establishment of early childhood education as part of the infrastructure of society by supporting equitable access and ethical practice through productive partnerships that leverage resources, create professional workforce pathways, and sustain high-quality programs.

### **Skills**

- \*Ability to set aside personal opinions to objectively observe situations and make positive professional recommendations and decisions.
- \*Extensive frontline work and program management experience that serves as the foundation for established relationships within private, public, and non-profit education settings
- \*Positive and successful long-term work experience within culturally, socially, economically, and developmentally diverse and vulnerable populations.
- \*Strong analytical, assessment, documentation, organizational, presentation, verbal and written communication skills.
- \* Well-developed team building and interpersonal relationship skills combined with the ability to work independently with minimal supervision.

### **Work Experience**

**[REDACTED]-present Project Manager Early Childhood Food Access Networking and Engagement, Hawai'i Public Health Institute (HIPHI)**

Supports families with young children, community-based organizations, local and federal systems, and the local food system through developing and monitoring opportunities for long-term, sustainable solutions that promote equitable nutrition and food access. Responsibly managed and distributed close to \$500,000 of federal funding from 2022 to present via contract development, monitoring and management. Seeks and contributes to fund development through researching local and national funding opportunities and grant development.

**[REDACTED] Director Seagull Schools Ko Olina**

Supported the organization's values and commitment to providing high quality and affordable early learning programs and supporting intergenerational relationships that are mutually beneficial. Responsible for program and budget management, enrollment, daily administration and operations, staffing recruitment and retention, facility maintenance, and strategic planning as related to re-opening the program after being closed for 7 months due to the COVID-19 pandemic. Works closely with resort



management association where program is located, community partners, and internal senior management on a weekly basis.

**Program Specialist V (Workforce Development)**

**State of Hawaii Office on Executive Learning, Honolulu, HI**

Coordinated existing early learning programs and services for children from prenatal until kindergarten entry. Worked with early childhood and higher education partners to develop and align pathways that lead to employment and support educators and administrators in becoming professionally qualified in Hawaii's four main settings for childcare and early childhood education. Ensured these pathways supported specialized competencies. Identified possible sources of tuition and other expense support. Collaborated with partners to establish a fund to grow infrastructure. Worked with public and private cross sector partners to identify and implement strategies to recruit and retain individuals to the field of early childhood education.

**Staff Development and Training Specialist**

**Honolulu Community Action Program (Head Start), Honolulu, HI**

Responsible for assisting Head Start staff (primarily Family Advocates, Family Advocate trainees, Teachers, Assistant Teachers, and Assistant Teacher trainees) in their career development paths, developed and secured training providers, activities, and resources for the overall Head Start program. Conducted monthly New Hire Orientation sessions. Maintained relationships and open communication with professional development contractors and vendors, institutions of higher learning, local high schools, DHS registry agency (PATCH), DHS, and community agencies.

**Family Educational Services Manager**

**Assessment Specialist/Teacher Site Supervisor**

**September Program Specialist**

**Partners in Development Foundation (Nā Pono No Nā 'Ohana Family Education Program), Honolulu, HI** Provided management support to a staff of 15 under the Program Director in a 4-component family education program housed on a Department of Education elementary school campus that averaged 270 participants (caregivers and children ages birth-5) and aimed to serve the Native Hawaiian population. Provided coaching, curriculum, and professional development support to the Junior Kindergarten teacher and assistant. Documented behavioral observations (Ages and Stages Questionnaire -ASQ and Work Sampling System-WSS), Administered and scored formal assessments (Peabody Picture Vocabulary Test-PPVT and Expressive Vocabulary Test-EVT) and screening tools (Get Ready to Read-GRTR, Phonological Awareness Literacy Screening-PALS, and Diagnostic Indicators for the Assessment of Learning-DIAL 4). Worked with families to connect with referring agencies when appropriate. Supervised and performed monthly Home Visits. Collected and summarized various types of data to produce reports as related to pre and post- test assessment results. Provided daily program office operational support. Contributed to staff performance appraisals, and the development of and compliance with program policies and procedures.

**Special Projects Assistant (Temporary/ Part Time Teacher Position) State of Hawaii Department of Education-Office of Hawaiian Education, Honolulu, HI**  
Primarily administrative and focused on coordinating the annual Nā Hopena A'o (HĀ) Summit. Responsibilities included, but were not limited to: finalizing venue, transportation, and vendor contracts, working with community members, summit vendors, presenters, participants, and staff, participating in monthly work group meetings and providing follow up communication, supporting the HĀ Special Projects Manager with various administrative/clerical duties, on site summit coordination support, summit follow up and feedback collection.

### **Education**

- Master of Early Childhood Education (MEd)  
University of Hawai'i at Manoa (anticipated graduation date: )
- Institute for Public Health Innovation Learning Hub (ongoing Professional Development courses-enrolled )
- Bachelor of Arts (Speech)  
University of Hawai'i at Manoa
- High School Diploma  
Punahou School

### **Certifications/Memberships/Affiliations**

#### **Current:**

- Hawaii State Department of Human Services Early Childhood Registry
  - Group Child Care Centers and Homes Qualified Center Director/Teacher Level: 5.1
- Early Childhood Action Strategy (ECAS) Team 3: On Track Health and Development (current)
- FARMWISE: Farm to CACFP Institute and Learning Collaborative (current)
- University of Hawai'i at Manoa Children's Healthy Living Hawai'i Local Advisory Council

#### **Completed:**

- Hawai'i CACFP Advisory Group
  - CACFP Mapping Project
- National Association for Family Child Care (NAFCC)
  - Member and Accreditation Observer
- Certified Affiliate CLASS Trainer
- Certified Pre-K CLASS Observer
- National Parent Leadership Training Institute

# Scott Tetsuji Nishimoto

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## WORK HISTORY

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### **CEEDS OF PEACE** **CO-EXECUTIVE DIRECTOR**

- Oversee operations of a local non-profit peacebuilding organization with a \$1 million budget, including an 9-person staff and 17 independent contractors
- Represent the organization through public appearances, publications, cross-organization convenings, media opportunities
- Fundraise through private grants, government contracts, individual donors, events, and manage existing funding sources
- Design new programs, approaches and curricula to train educators (DOE professional development), other community members, and youth
- Form partnerships with various community partners to make our service delivery more effective and efficient
- Manage finances, bookkeeping, and IRS reporting

### **EAST-WEST CENTER** **CONSULTANT**

- Design curriculum for the Equitable Futures Fellowship program, in partnership with the EWC Team and the Doris Duke Foundation to explore techniques to empower previously unheard voices and resolve inequity in its many forms, including gaps in income, healthcare, and education; impacts of the climate crisis; and challenges to societal pluralism
- Serve on the interview and selection committee
- Assist in the delivery of the Equitable Futures Fellowship curriculum

### **UNIVERSITY OF HAWAII** **LECTURER, PEACE & CONFLICT RESOLUTION**

- Taught PACE 310 - Survey to Peace & Conflict Resolution
- Designed curriculum that fulfills the Oral Communication Focus and Ethical Focus, as required by the department
- Facilitated engaging, thought-provoking discourse between 24 undergraduate students

### **DOMESTIC VIOLENCE ACTION CENTER** **FACILITATOR**

- Facilitated weekly youth groups on the topics of leadership, social & emotional well-being, violence, and other topics
- Compiled reports on session outcomes

#### **ABILITIES UNLIMITED**

**VICE PRESIDENT, WORKFORCE DEV. & COMMUNITY RELATIONS**  
**FORMER COMMUNITY ENGAGEMENT & ADVOCACY SPECIALIST**  
 (08/2012-08/2013)

- Managed various state-funded, city-funded, and privately-funded programs with budgets totaling to approximately one-million dollars per year
- Led the organization's plan to expand and ensure its sustainability
- Fundraised through grants, contracts, and minor events
- Worked one-on-one with individuals with disabilities on the Wai'anae Coast

#### **EDUCATION**

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**UNIVERSITY OF PENNSYLVANIA, EXECUTIVE PROGRAM,**  
**SOCIAL IMPACT STRATEGY**  
 CERTIFICATE

**UNIVERSITY OF HAWAI'I, RICHARDSON SCHOOL OF LAW**  
 JURIS DOCTORATE

**UNIVERSITY OF HAWAI'I AT MANOA**  
 BA, ENGLISH

**UNIVERSITY LABORATORY SCHOOL**  
 HS DIPLOMA

#### **HONORS & ACTIVITIES**

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**2023 OBAMA LEADERS USA PROGRAM (INAUGURAL COHORT)**  
 OBAMA LEADER

**WAI'ALAE PUBLIC CHARTER SCHOOL**  
 BOARD MEMBER, EDUCATION COMMITTEE CHAIR

**PACIFIC BUDDHIST ACADEMY**  
 BOARD MEMBER, GOVERNANCE COMMITTEE CHAIR

**PUANANI BURGESS - BUILDING THE BELOVED COMMUNITY**  
 INVITED COHORT MEMBER

**O'AHU ECONOMIC DEVELOPMENT BOARD – ALOHA RESPONSE**  
 COHORT MEMBER

**HAWAI'I PACIFIC MODEL UNITED NATIONS**  
 KEYNOTE SPEAKER



**HAWAI'I CONFERENCE OF RELIGIONS FOR PEACE**  
KEYNOTE SPEAKER



**NAGASAKI PEACE COMMEMORATION COMMITTEE**  
COMMITTEE MEMBER AND CEREMONY M.C.



**STATE OF HAWAI'I REHABILITATION COUNCIL**  
GUBERNATORIAL APPOINTEE



**GLOBAL SHAPERS**  
VICE CURATOR



**BIG BROTHERS BIG SISTERS OF HAWAI'I**  
BIG BROTHER



**AMERICAN CIVIL LIBERTIES UNION OF HAWAI'I**  
BOARD OF DIRECTORS



**PHI BETA KAPPA, UNIVERSITY OF HAWAI'I CHAPTER**  
MEMBER



**UNIVERSITY LABORATORY SCHOOL**  
VOLLEYBALL AND BASKETBALL COACH

# ANDREA BLACKWELL

## Education

### ***PhD in Education/University of Hawaii/***

Dissertation: Adapting Montessori Education: A Study of Implementation in Poland

### ***Masters of Education/Lander University/***

Masters of Education with a Montessori 6-12 focus. AMS EI-EII credential.

### ***Bachelor of Arts in Elementary Education/USC Upstate/***

BA in Elementary Education, 2nd-6th grade.

## Experience

### ***Montessori Community School***

#### ***Elementary Education Coordinator/***

Maintain and support the highest standard of Elementary Montessori education. Hold weekly and biweekly meetings with the Elementary teachers. Coordinate special events and activities between classrooms and address level concerns. Focus on assisting new teachers with professional development, parent education, and various needs.

#### ***Upper Elementary Teacher/***

Coordinate lessons and manage a classroom of 4th-6th grade students. Organize an annual off-island camp outing and parent nights. Facilitate annual fundraisers and activities that aid students in developing soft skills, such as leadership, organization, and time management.

#### ***Elementary Summer School Coordinator/***

Arrange staffing, field trips, and buses, and help guide and assist faculty. Coordinate daily schedule. Help faculty facilitate lessons in creative arts and Hawaiian-based curriculum.

### **American Montessori Society/**

#### **Research Consultant**

Supporting and facilitating research on Montessori education, including analyzing data, identifying trends, providing guidance on research methodologies, connecting researchers with relevant resources, and disseminating research findings to the broader community.

### **Montessori Teacher Trainer**

#### **Lander University/**

#### **Montessori Education Center of the Rockies/**

Work with aspiring Montessori elementary teachers, teaching under AMS and MACTE accreditation standards. Help teachers understand the proper use of Montessori materials, the organization of Montessori classrooms, and a deeper understanding of Montessori philosophy.

### **Consultation of Endeavor Montessori**

#### **Consult with an Upper Elementary class in Dunwoody, GA/**

Guide the Elementary class teachers with goal setting and weekly self-reflection through observations and meetings with the lead teachers and administration. Goal setting was based on individual teacher and classroom needs, such as classroom management strategies, the teacher's student relationships, and the prepared environment. Monthly check-ins provided continuous support for developing their classrooms over four months.

### **Warsaw Montessori School/Warsaw, Poland**

#### **Upper Elementary Teacher/**

Conduct Montessori lessons in all subject areas in English. Conduct afternoon group meetings with newly trained or teachers in training at the school; including training with Montessori materials and classroom strategies.

### **Meeting Street Academy/Charleston, SC**

#### **Preschool After School Coordinator/**

Arrange curriculum and daily afternoon schedule for After-school preschool teachers.

### **Montessori Fountainhead School/Charleston, SC**

#### **Elementary School Assistant/**

## Contact

[Redacted]

[Redacted]

(LinkedIn)

haumanatech.wordpress.com/

(Company)

## Top Skills

Podcasting

Public Policy

Policy Analysis

## Languages

English

Japanese

## Certifications

Multi-tiered System of Supports:  
A Comprehensive Framework for  
Implementing the CA CCSS

Hawaii Department of Education -  
Provisional License

Teaching Certificate, California

## Publications

Bypass to a Leaky Pipeline, Case  
Study of the Bridge Program at  
Punahou School

# Casey Agena, Ed.D

Idea Alchemist | Policy and Impact | Learning and Design  
Honolulu, Hawaii, United States

## Summary

Colleagues know me as highly creative and someone who can always be trusted to come up with a new approach. But I know that teaching and learning comes first, and I never try to impose my ideas on others. Instead, I spend a lot of time understanding the business and the audience before suggesting ideas. I can (and often do) work well alone, but I'm at my best collaborating with others.

## Experience

Haumana Ventures

Senior Education Consultant

[Redacted]

Honolulu, Hawaii, United States

A passion for improving learning | Provides support through policy and planning | Focuses on a collaborative on improving the entire education ecosystem; Pre K - Higher Ed

Past Projects Include:

- Rush Education - <https://rusheducation.org/>
- Air Reading - <https://airreading.com/>
- Honorlock (RevOps + Bids + Proposals) - <https://honorlock.com/>
- Renaissance Learning (Instructional Coaching for eduClimber) - <https://renaissance.com/>
- Revolution Prep (Bids and Proposals) - <https://www.revolutionprep.com/>
- Securly (Bids and Proposals) - <https://securly.com/>
- BetterLesson (Instructional Coaching) - <https://betterlesson.com/>
- Love In A Big World (Sales and Gov't Contracts) - <https://loveinabigworld.org/>
- Kamehameha Schools - <https://www.ksbe.edu>
- Polyup - <https://www.polyup.com>
- Santa Clara County Office of Education - <https://www.sccoe.org>

Hawaii State Department of Education

2 years 4 months



### (TA) Director and Executive Assistant

[REDACTED]  
Honolulu, Hawaii, United States

Provide fiscal and administrative support for statewide implementing of programs. Guide legislative process for statewide policies during legislative sessions and work directly with policy analyst. Provide statewide guidance for current and new policies (i.e. Hawaii AI Guidance)

### Office of Curriculum and Instructional Design / Education Specialist II

[REDACTED]  
Honolulu, Hawaii, United States

Provide a comprehensive menu of engaging summer learning opportunities for students in the upcoming summer months for all grade levels, from a transition program for incoming kindergartners to paid summer internships for our graduating seniors. Schools have worked hard to design programs of high interest for vulnerable students and enrichment programs for students seeking to explore new interests.

### STEM Coordinator

[REDACTED]  
Kaimuki Middle School - Voyager Center

Enhance projects through cultivating internal and external community support  
Secure external financial resources and expertise for projects  
Connect with Department Heads and Team Leaders to strategize and align efforts  
Coordinate and refine Voyager Center operations to create student-centered learning opportunities

### Honorlock

#### Bids and Proposals

[REDACTED]  
Boca Raton, Florida, United States

Assist in maintaining proposal content library to include the most timely, consistent, and currently relevant market, product, and services information for supporting bids and proposal responses

### Renaissance Learning

#### eduClimber Instructor

[REDACTED]  
Honolulu, Hawaii, United States

Supports post-sales and onboarding districts with eduClimber Solutions:  
An interactive whole child data collaboration and management system that supports essential MTSS processes.

Securly  
Manager, Bids + Proposals

San Francisco Bay Area

- Worked with cross-functional teams in the development of proposals
- Coordinated and produced proposals and responses to customer requests (RFI, RFQ, ITT, RFP, and others)
- Executed proposal response plans while working with key internal stakeholders (e.g., Sales/Account Teams, Service Teams, Legal, Security, Compliance, etc.).
- Responsible for driving the proposal process and ensuring critical milestones and all deadlines are met, as well as coordinating reviews with key stakeholders providing final quality assurance and adherence to corporate and legal compliance.

Santa Clara County Office of Education  
Technology Coordinator

San Francisco Bay Area

Advance STEAM Initiative to serve schools and districts with content support and integrated learning.

Provide Computer Science Framework for K-12 and support pathways for college and careers, with a focus on engineering, computer science and design, interfacing with districts to support their STEAM program growth and assisting with STEAM Strategic Plans.

Provide program development with partnerships between school districts and industry leaders.

Silicon Valley Education Foundation (SVEF)  
Program Manager

San Jose

Continuously monitor developments in the EdTech arena, research successful programs and introduce new ideas to further the utilization of EdTech in the targeted school districts.

Monitor the iterative loop that pairs EdTech entrepreneurs with teachers to build a feedback cycle for effective products.

Establish metrics to document and ensure that EdTech programs meet objectives and oversee data collection and analysis for EdTech evaluation purposes.

### Code.org

Regional Learning Partner - Program Manager for Silicon Valley Education Foundation

[REDACTED]

San Jose, CA

Organize and host quality, local workshops for districts and schools implementing Code.org's high school and middle school programs, with Code.org-accredited facilitators

Build, grow and sustain a local community of computer science educators (or join an existing community)

Develop independent funding sources for the long-term sustainability of the work (with Code.org's cooperation)

### Punahou School

[REDACTED]

Director, Summer School

[REDACTED]

Honolulu

Managed Summer Program for K-12 School

4000 Students, 400 Faculty (seasonal Part-Time)

Development and Advisory Team for Clarence T. C. Ching PUEO Program

### Faculty

[REDACTED]

Honolulu

Taught English/Social Studies to 6th Grade students in Middle School, 56 students per semester

Revised the syllabus to meet accreditation standards

Coordinated grading and with a team of 4 teachers

San Francisco Unified School District - Burt Children's Center  
Special Education

Created and modified IEPs and 504s for students in residential facilities

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## Education

Riley Institute at Furman University

Education Policy Analysis

University of Southern California

Ed. D, Education Leadership

Boston College

M. Ed., Education Administration

Purdue University

B.A., Education

Punahou School

HS Diploma

## Board Member Information

To be completed individually by each Applicant Governing Board member. All forms must be signed by hand.

Serving on a public charter school governing board is a position of public trust and fiduciary responsibility. As a governing board member of a public school, you are responsible for ensuring the quality of the school's plans, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its Charter Contract.

As part of the application for a new charter school, the Commission requires that each prospective governing board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the team behind each school proposal in advance of the applicant interview; and 2) to encourage governing board members to reflect individually, as well as collectively, on their common mission, purposes, and obligations at the earliest stage of school development. Please add the full name of your school to the footer of this document so that it appears on all pages.

### Background: Your Role and Experience

1. Name of charter school on whose governing board you intend to serve: Mana 'Ulu Montessori Charter Lab School
2. Contact information: Click or tap here to enter text.  
Name: Andrea (Andee) Blackwell  
Phone: [REDACTED]  
E-mail: a[REDACTED]
3. Describe your role and position on the applicant governing board. Click or tap here to enter text.
4. Attach your resume and professional biography.  
☐ Resume and professional bio are attached to this form.

5. Check all that apply. Indicate whether you currently or have previously served on a board:

- ☐ of a school district,
- ☐ another charter school,
- ☒ a non-public school, or
- ☒ any nonprofit organization.

If you checked any of the boxes above, please identify the names of the boards you have served, or are serving on.

Non-public school- Montessori Community School

Nonprofit organization- Hawai'i Bicycle League

6. How, and by whom, were you recruited to serve on the governing board of the proposed charter school?  
Kristy Sakai, through personal contact
7. What is your understanding of the appropriate role of a public charter school governing board member?

Mana 'Ulu Montessori Charter Lab School

The appropriate role of a public charter school governing board member is to provide strategic oversight and ensure the school is fulfilling its mission and meeting its goals. Board members are responsible for setting policy, ensuring financial accountability, and supporting the school leadership in the effective day-to-day management of the school. They should also advocate for the school, engage with the community, and ensure compliance with all legal and regulatory requirements. Board members must focus on long-term sustainability, academic quality, and continuous improvement, while avoiding involvement in the school's day-to-day operations.

8. Describe any previous experience relevant to serving on the charter school's governing board (e.g., other board service). If you have not had previous experience of this nature, explain how your presence on the applicant governing board enhances their capacity of opening and running a public charter school.

I have relevant board experience as a community member on the Hawai'i Bicycle League board, where I contributed to strategic planning and community outreach. Additionally, I served as a non-voting member on the Montessori Community School board as a teacher representative, providing insights into the needs of educators and supporting the school's mission.

### **School Mission and Plan**

9. How does the school's mission and vision align to your personal or professional beliefs/goals?

The mission and vision of Mana 'Ulu Montessori Charter Lab School align with my personal and professional values, particularly around community-centered and sustainable education. I support the school's focus on a community-driven model, engaging local organizations and families. The "farm-to-ECE" approach also resonates with my commitment to environmental stewardship, teaching children about agriculture, nutrition, and sustainability, while fostering their academic growth and responsibility for the world around them.

10. Describe your understanding of the school's proposed academic plan?

The academic plan for Mana 'Ulu Montessori Charter Lab School is designed to provide a high-quality, hands-on, and holistic educational experience for young learners, while incorporating key principles of Montessori pedagogy, Hawaiian cultural values, and sustainability practices. The plan aims to foster independent, self-directed learning in a supportive and nurturing environment that reflects the unique needs of the community and the natural surroundings of Hawai'i.

11. As a governing board member, how will you ensure that the school is succeeding or is not succeeding in achieving its mission?

As a governing board member, my role is to ensure Mana 'Ulu Montessori Charter Lab School stays aligned with its mission, meets educational goals, and serves the community. I will provide strategic oversight, make data-driven decisions, and engage with the community to continuously improve the school. With my expertise in Montessori education and experience in Hawai'i, I will ensure the curriculum is implemented with fidelity, while integrating Hawaiian language, values, and practices to create a culturally responsive environment. My background will help the school innovate and meet the diverse needs of its students.

### **Governance**

12. Describe the role that the governing board will play in the school's operation.

While not involved in day-to-day operations, the governing board will provide high-level strategic direction, ensure financial and academic accountability, and foster community involvement to help Mana 'Ulu Montessori Charter Lab School fulfill its mission of nurturing lifelong learners and responsible community members.

13. How will you monitor if the school is on target to successfully meet its operational goals for year 1?

Regularly review academic performance, enrollment, attendance, financial health, and fundraising efforts. Hold monthly board meetings to assess progress on strategic goals and gather staff feedback on challenges and successes. Collect parent and community feedback through surveys and meetings to ensure alignment with their needs. Track teacher

training progress and ensure alignment with Montessori practices and cultural responsiveness. Assess the effectiveness of the “Malama Honua” environmental initiative through student participation and project-based assessments.

14. Describe the governing Board oversight that needs to take place over the duration of the initial contract to ensure the applicant school is making positive progress to achieving its mission and vision.

Governing board oversight during the initial contract will involve regular reviews of the school’s academic performance, financial health, and operational goals. The board will monitor key metrics such as student achievement, enrollment trends, budget adherence, and community engagement. We will provide support to the school leadership while ensuring alignment with the mission and vision.

15. How would you handle a situation in which you believe one or more members of the governing board were acting unethically or not in the best interests of the school?

If I believed that one or more members of the governing board were acting unethically or not in the best interests of the school, I would first address the issue privately with the individual(s) involved to understand their perspective and clarify any misunderstandings. If the situation did not resolve, I would bring the concern to the board chair and potentially initiate a formal discussion within the board to review the behavior, ensuring that any actions are in line with ethical standards and the school’s mission. If necessary, I would advocate for an independent review or mediation to protect the integrity of the board and the school’s interests. Transparency, accountability, and adherence to the school’s policies would guide my actions in addressing the situation.

#### Disclosures

16. Indicate whether you or your spouse knows the other prospective governing board members for the proposed school. If so, please indicate the precise nature of your relationship.

☒ I/we do not know these individuals ☐ Yes

17. Indicate whether you or your spouse knows any person who will be a school employee. If so, indicate the precise nature of your relationship.

☒ I/we do not know any such employees ☐ Yes [Click or tap here to enter text.](#)

18. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (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 school.

☒ I/we do not know any such employees ☐ Yes

19. Indicate if you, your spouse, or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

☒ I/we do not anticipate conducting any such business ☐ Yes

20. Indicate if you, your spouse, or other immediate family members have a financial interest in the school or a financial interest with a vendor or education service provider to the school. If so, indicate the precise nature of the financial interest that you have.

☒ I/we do not have a financial interest ☒ Yes

21. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows 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 school does not intend to contact with an education service provider or school management organization. ☐ I/we do not know any such persons ☐ Yes
22. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual, or management interest in the provider. For any interest indicated, provide a detailed description.
- ☒ N/A. ☐ I/we have no such interest ☐ Yes Click or tap here to enter text.
23. If the school plans to contract with an education service provider, indicate if you, your spouse, or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, 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 Click or tap here to enter text.
24. 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 that is partnering with the charter school. 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 Click or tap here to enter text.
25. Indicate any potential ethical or legal conflicts of interests that would or are likely to exist should you serve on the school's governing board.
- ☒ None ☐ Yes

### Certification

I, Andrea Leigh Blackwell, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Commission as a prospective governing board member is true and correct in every respect. I agree to notify the Commission if there are any changes to the above disclosures.



1/14/2025

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Signature

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Date



## Board Member Information

To be completed individually by each Applicant Governing Board member. All forms must be signed by hand.

Serving on a public charter school governing board is a position of public trust and fiduciary responsibility. As a governing board member of a public school, you are responsible for ensuring the quality of the school's plans, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its Charter Contract.

As part of the application for a new charter school, the Commission requires that each prospective governing board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the team behind each school proposal in advance of the applicant interview; and 2) to encourage governing board members to reflect individually, as well as collectively, on their common mission, purposes, and obligations at the earliest stage of school development. Please add the full name of your school to the footer of this document so that it appears on all pages.

### Background: Your Role and Experience

1. Name of charter school on whose governing board you intend to serve: Mana Ulu Montessori Charter Lab School
2. Contact information:  
Name: Casey Agena.  
Phone: [REDACTED]  
E-mail: [REDACTED]
3. Describe your role and position on the applicant governing board. Non-voting member
4. Attach your resume and professional biography.  
X Resume and professional bio are attached to this form.
5. Check all that apply. Indicate whether you currently or have previously served on a board:  
☐ of a school district,  
X another charter school,  
☐ a non-public school, or  
X any nonprofit organization.  
If you checked any of the boxes above, please identify the names of the boards you have served, or are serving on.  
What Not You Academy (WA), YMCA Honolulu (HI), Code For Fun (CA)
6. How, and by whom, were you recruited to serve on the governing board of the proposed charter school?  
Self recruitment
7. What is your understanding of the appropriate role of a public charter school governing board member?  
To guide the school director in personnel, fiscal and operating decisions.
8. Describe any previous experience relevant to serving on the charter school's governing board (e.g., other

Mana 'Ulu Montessori Charter Lab School

board service). If you have not had previous experience of this nature, explain how your presence on the applicant governing board enhances their capacity of opening and running a public charter school.

Most board experience has been on policy and fiscal guidance..

### **School Mission and Plan**

9. How does the school's mission and vision align to your personal or professional beliefs/goals?

Addressing learning gaps and workforce gaps in Early Childhood and K-12 education is aligned with personal and professional work.

10. Describe your understanding of the school's proposed academic plan?

I helped create the academic plan.

11. As a governing board member, how will you ensure that the school is succeeding or is not succeeding in achieving its mission?

As a non-voting member and director of the schools, addressing the fiscal benchmarks, as well as meeting enrollment benchmarks.

### **Governance**

12. Describe the role that the governing board will play in the school's operation.

The governing board will provide guidance to the school director.

13. How will you monitor if the school is on target to successfully meet its operational goals for year 1?

Our quarterly meetings will provide the update and direction

14. Describe the governing Board oversight that needs to take place over the duration of the initial contract to ensure the applicant school is making positive progress to achieving its mission and vision.

Fiscal oversight (particularly with personnel) will be a primary area of governance in the first 90 days.

15. How would you handle a situation in which you believe one or more members of the governing board were acting unethically or not in the best interests of the school?

Report findings to the Board Chair.

### **Disclosures**

16. Indicate whether you or your spouse knows the other prospective governing board members for the proposed school. If so, please indicate the precise nature of your relationship.

☐ I/we do not know these individuals    ☒ Yes    In my role as Director of the school

17. Indicate whether you or your spouse knows any person who will be a school employee. If so, indicate the precise nature of your relationship.

☐ I/we do not know any such employees    ☒ Yes    Director of the school

18. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (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 school.

☐ I/we do not know any such employees    ☒ Yes    Director of the school

19. Indicate if you, your spouse, or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

☐ I/we do not anticipate conducting any such business    ☒ Yes    Director of the school

20. Indicate if you, your spouse, or other immediate family members have a financial interest in the school or a financial interest with a vendor or education service provider to the school. If so, indicate the precise nature of the financial interest that you have.
- ☒ I/we do not have a financial interest ☐ Yes [Click or tap here to enter text.](#)
21. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows 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 school does not intend to contact with an education service provider or school management organization. ☐ I/we do not know any such persons ☐ Yes [Click or tap here to enter text.](#)
22. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual, or management interest in the provider. For any interest indicated, provide a detailed description.
- ☐ N/A. ☒ I/we have no such interest ☐ Yes [Click or tap here to enter text.](#)
23. If the school plans to contract with an education service provider, indicate if you, your spouse, or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, 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 [Click or tap here to enter text.](#)
24. 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 that is partnering with the charter school. 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 [Click or tap here to enter text.](#)
25. Indicate any potential ethical or legal conflicts of interests that would or are likely to exist should you serve on the school's governing board.
- ☒ None ☐ Yes

### Certification

I, Casey Agena, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Commission as a prospective governing board member is true and correct in every respect. I agree to notify the Commission if there are any changes to the above disclosures.

Casey Agena

January 13, 2025

Signature

Date

## Board Member Information

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As part of the application for a new charter school, the Commission requires that each prospective governing board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the team behind each school proposal in advance of the applicant interview; and 2) to encourage governing board members to reflect individually, as well as collectively, on their common mission, purposes, and obligations at the earliest stage of school development. Please add the full name of your school to the footer of this document so that it appears on all pages.

### Background: Your Role and Experience

1. Name of charter school on whose governing board you intend to serve: Mana 'Ulu Montessori Charter Lab School
2. Contact information:  
Name: Scott Nishimoto  
Phone: [REDACTED]  
E-mail: [REDACTED]
3. Describe your role and position on the applicant governing board. Governing School Board Member
4. Attach your resume and professional biography.  
X Resume and professional bio are attached to this form.
5. Check all that apply. Indicate whether you currently or have previously served on a board:  
☐ of a school district,  
X another charter school,  
X a non-public school, or  
X any nonprofit organization.

If you checked any of the boxes above, please identify the names of the boards you have served, or are serving on.

Previously served on boards of: Wai'alaie Elementary Public Charter School; Pacific Buddhist Academy; ACLU-Hawaii

6. How, and by whom, were you recruited to serve on the governing board of the proposed charter school?

Kristy Sakai recruited me to serve on the governing board. As a parent of a student at the Chaminade Montessori Preschool, she and I have had ongoing conversations about the vision of a public charter school.

Mana 'Ulu Montessori Charter Lab School

7. What is your understanding of the appropriate role of a public charter school governing board member?  
A public charter school governing board member is tasked to collaboratively create and enforce rules, policies, and procedures for the school. They are also responsible for ensuring that the school complies with all laws and adheres to best practices. Brainstorming and establishing a vision for the future of the school is another key role for a public charter school governing board member.
8. Describe any previous experience relevant to serving on the charter school's governing board (e.g., other board service). If you have not had previous experience of this nature, explain how your presence on the applicant governing board enhances their capacity of opening and running a public charter school.

I previously served as a member of the Wai'ala'e Elementary Public Charter School and chaired its Education Committee. I also served as a board member of Pacific Buddhist Academy, a private high school, and chaired its governance committee.

#### School Mission and Plan

9. How does the school's mission and vision align to your personal or professional beliefs/goals?  
As a parent of Montessori-educated children and as the Executive Director of an organization that focuses on peacebuilding in schools, I value educational approaches that foster independence, respect, and conflict resolution. I believe in raising empathetic, self-directed children who will contribute to systems that promote peace, and I feel strongly that a Montessori pre-K education is an outstanding building block to this.
10. Describe your understanding of the school's proposed academic plan?

Mana 'Ulu Montessori Charter Lab School focuses on providing a well-rounded, experiential education that integrates Montessori principles. These principles prioritize individualized learning, where students are encouraged to explore and engage with the curriculum at their own pace while developing self-direction and critical thinking skills. The school's emphasis on hands-on, place-based learning suggests that students will actively engage with their surroundings and local community, connecting academic content to real-world experiences.

The school is designed to develop not just intellectual skills but also moral character, personal competencies, and a sense of responsibility to society. The focus on "choice" means students may have opportunities to direct their learning paths and make decisions in their educational journey, fostering independence and a sense of ownership over their education. Additionally, the inclusion of "research and innovation" suggests that the school encourages inquiry-based learning, collaboration, and problem-solving, which would contribute to preparing students for both higher education and the workforce.

11. As a governing board member, how will you ensure that the school is succeeding or is not succeeding in achieving its mission?

As a governing board member, ensuring that Mana 'Ulu Montessori Charter Lab School is succeeding in achieving its mission requires a combination of active oversight, continuous evaluation, and strategic support. Here's how I would approach this responsibility:

1. Monitor Student Outcomes and Progress: Regularly reviewing student performance data, including academic achievements, personal development, and social-emotional growth, will be key in evaluating whether the school is meeting its mission.
2. Review Curriculum and Instructional Practices: I would work with the school leadership to ensure that the Montessori principles, hands-on learning, and place-based mindfulness are consistently being implemented in the classroom.
3. Foster Professional Development and Innovation: Supporting the professional growth of teachers and

Mana 'Ulu Montessori Charter Lab School

staff is essential for a successful academic plan. I would ensure that the staff has access to ongoing Montessori training, opportunities for innovation, and a collaborative environment where best practices can be shared.

4. Ensure Community Engagement and Partnerships: The school's mission places significant emphasis on building a just and peaceful society and serving the local community. As a governing board member, I would prioritize building strong relationships with local organizations, families, and stakeholders.
5. Align Resources with Mission Goals: I would advocate for ensuring that the school's budget, resources, and fundraising efforts are strategically aligned with its mission.
6. Regularly Assess and Adjust Strategies: To ensure continuous improvement, I would promote regular reviews of the school's progress toward its mission.

## Governance

12. Describe the role that the governing board will play in the school's operation.

1. Oversight of operations and mission alignment
2. Financial oversight
3. Policy development and implementation
4. Accountability and evaluation.

13. How will you monitor if the school is on target to successfully meet its operational goals for year 1?

If selected to be a charter school, the governing school board will go through a collaborative process to set goals and key performance indicators. These key performance indicators may include academic performance, staff, student, and family engagement, and/or social-emotional growth, among other indicators. These key performance indicators will be continuously tracked and measured over the course of year 1.

14. Describe the governing Board oversight that needs to take place over the duration of the initial contract to ensure the applicant school is making positive progress to achieving its mission and vision.

During the initial contract, the governing board's oversight will need to be extra vigilant. As mentioned above, spending time and energy to collaboratively set goals and key performance indicators will be very important in setting the right foundation for the initial contract period. The board will also have to be ready to make pivots to its plans, as the initial contract may be a time of experimentation and changing of goals.

15. How would you handle a situation in which you believe one or more members of the governing board were acting unethically or not in the best interests of the school?

The first step of action would be a fact-find and do our due diligence. If, after this due diligence process, we have reason to believe that this board member is acting unethically or not in the best interest of the school, and this action cannot be remedied, then removal from the board may be in the best interest of all parties involved. If the action is illegal, then we would report this activity to the proper authorities.

## Disclosures

16. Indicate whether you or your spouse knows the other prospective governing board members for the proposed school. If so, please indicate the precise nature of your relationship.

X I/we do not know these individuals ☐ Yes Click or tap here to enter text.

17. Indicate whether you or your spouse knows any person who will be a school employee. If so, indicate the precise nature of your relationship.

☐ I/we do not know any such employees X Yes Kristy Sakai has been the administrator for the school that both of my children have attended for the past 4 years.

18. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee, or agent of an entity). If so,

Mana 'Ulu Montessori Charter Lab School

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 school.

X I/we do not know any such employees ☐ Yes Click or tap here to enter text.

19. Indicate if you, your spouse, or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

X I/we do not anticipate conducting any such business ☐ Yes Click or tap here to enter

text.

20. Indicate if you, your spouse, or other immediate family members have a financial interest in the school or a financial interest with a vendor or education service provider to the school. If so, indicate the precise nature of the financial interest that you have.

X I/we do not have a financial interest ☒ Yes Click or tap here to enter text.

21. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows 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 school does not intend to contact with an education service provider or school management organization. X I/we do not know any such persons ☐ Yes Click or tap here to enter text.

22. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual, or management interest in the provider. For any interest indicated, provide a detailed description.

☐ N/A. X I/we have no such interest ☐ Yes Click or tap here to enter text.

23. If the school plans to contract with an education service provider, indicate if you, your spouse, or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

☐ N/A X I/we or my family do not anticipate conducting any such business ☐ Yes Click or tap here to enter text.

24. 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 that is partnering with the charter school. 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 Click or tap here to enter text.

25. Indicate any potential ethical or legal conflicts of interests that would or are likely to exist should you serve on the school's governing board.

X None ☐ Yes

## Certification

I, Scott Nishimoto, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Commission as a prospective governing board member is true and correct in

Mana 'Ulu Montessori Charter Lab School

every respect. I agree to notify the Commission if there are any changes to the above disclosures.

1/13/25

Signature

Date



## Board Member Information

To be completed individually by each Applicant Governing Board member. All forms must be signed by hand.

Serving on a public charter school governing board is a position of public trust and fiduciary responsibility. As a governing board member of a public school, you are responsible for ensuring the quality of the school's plans, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its Charter Contract.

As part of the application for a new charter school, the Commission requires that each prospective governing board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the team behind each school proposal in advance of the applicant interview; and 2) to encourage governing board members to reflect individually, as well as collectively, on their common mission, purposes, and obligations at the earliest stage of school development. Please add the full name of your school to the footer of this document so that it appears on all pages.

### Background: Your Role and Experience

1. Name of charter school on whose governing board you intend to serve: Mana 'Ulu Montessori Charter Lab School

2. Contact information:

Name: Dana Ciacchi

Phone: [REDACTED]

E-mail: [REDACTED]

3. Describe your role and position on the applicant governing board. [Click or tap here to enter text.](#)

4. Attach your resume and professional biography.

☒ Resume and professional bio are attached to this form.

5. Check all that apply. Indicate whether you currently or have previously served on a board:

☐ of a school district,

☐ another charter school,

☐ a non-public school, or

☐ any nonprofit organization.

If you checked any of the boxes above, please identify the names of the boards you have served, or are serving on.

N/A

6. How, and by whom, were you recruited to serve on the governing board of the proposed charter school?

Kristy Sakai-professional colleague

7. What is your understanding of the appropriate role of a public charter school governing board member?

The appropriate role of a public charter school governing board member is to provide strategic oversight and

Mana 'Ulu Montessori Charter Lab School

ensure the school is fulfilling its mission and meeting its goals. Board members are responsible for setting policy, ensuring financial accountability, and supporting the school leadership in the effective day-to-day management of the school. They should also advocate for the school, engage with the community, and ensure compliance with all legal and regulatory requirements. Board members must focus on long-term sustainability, academic quality, and continuous improvement, while avoiding involvement in the school's day-to-day operations.

8. Describe any previous experience relevant to serving on the charter school's governing board (e.g., other board service). If you have not had previous experience of this nature, explain how your presence on the applicant governing board enhances their capacity of opening and running a public charter school.

My presence on the Mana 'Ulu Montessori Charter Lab School enhances their capacity of operating a public charter school by providing the perspective of a broad lens of the early childhood education mixed delivery options within the state of Hawai'i. My extensive work experience in multiple early childhood settings in roles that require operational, financial, policy, best practice and content knowledge will be utilized to contribute to accurate and informed contributions to the decision making process.

### **School Mission and Plan**

9. How does the school's mission and vision align to your personal or professional beliefs/goals?

The mission and vision of Mana 'Ulu Montessori Charter Lab School align with my personal and professional values, particularly around community-centered, high-quality accessible and sustainable education. I support the school's focus on a community-driven model, engaging local organizations and families. The "farm-to-ECE" approach also resonates with my commitment to place based learning, cultural relevance and food equity and access. Informing children about agriculture, nutrition, and sustainability, while fostering their personal development, academic growth and responsibility for each other and their world.

10. Describe your understanding of the school's proposed academic plan?

The academic plan for Mana 'Ulu Montessori Charter Lab School is designed to provide a high-quality, hands-on, and holistic educational experience for young learners, while incorporating key principles of Montessori pedagogy, Hawaiian cultural values, and sustainability practices. The plan aims to foster independent, self-directed learning in a supportive and nurturing environment that reflects the unique needs of the community and the natural surroundings of Hawai'i.

11. As a governing board member, how will you ensure that the school is succeeding or is not succeeding in achieving its mission?

As a governing board member, my role is to ensure Mana 'Ulu Montessori Charter Lab School stays aligned with its mission, meets educational goals, and serves the community. I will provide strategic oversight, make data-driven decisions, and engage with the community to continuously improve the school. With my expertise in Montessori education and experience in Hawai'i, I will ensure the curriculum is implemented with fidelity, while integrating Hawaiian language, values, and practices to create a culturally responsive environment. My background will help the school innovate and meet the diverse needs of its students.

### **Governance**

12. Describe the role that the governing board will play in the school's operation.

While not involved in daily operations, the governing board will provide high-level strategic direction, ensure financial and developmentally appropriate academic accountability, and foster community involvement  
Mana 'Ulu Montessori Charter Lab School

to help Mana ‘Ulu Montessori Charter Lab School fulfill its mission of nurturing lifelong learners and responsible community members.

13. How will you monitor if the school is on target to successfully meet its operational goals for year 1?

Regularly review academic performance, enrollment, attendance, financial health, and fundraising efforts. Participate in monthly board meetings to assess progress on strategic goals and gather and review staff feedback on challenges and successes. Collect parent and community feedback through surveys and meetings to ensure alignment with their needs. Track teacher training progress and ensure alignment with Montessori practices and cultural responsiveness. Assess the effectiveness of the “Malama Honua” environmental initiative through student participation and project-based assessments.

14. Describe the governing Board oversight that needs to take place over the duration of the initial contract to ensure the applicant school is making positive progress to achieving its mission and vision.

Governing board oversight during the initial contract will involve regular reviews of the school’s academic performance, financial health, and operational goals. The board will monitor key metrics such as student development and achievement, enrollment trends, budget adherence, and community engagement. We will provide support to the school leadership while ensuring alignment with the mission and vision.

15. How would you handle a situation in which you believe one or more members of the governing board were acting unethically or not in the best interests of the school?

If I believed that one or more members of the governing board were acting unethically or not in the best interests of the school, I would first address the issue privately with the individual(s) involved to understand their perspective, intent, and clarify any misunderstandings. If the situation did not resolve, I would bring the concern to the board chair and potentially initiate a formal discussion within the board to review the behavior, ensuring that any actions are in line with ethical standards and the school’s mission. If necessary, I would advocate for an independent review or mediation to protect the integrity of the board and the school’s interests. Transparency, accountability, and adherence to the school’s policies would guide my actions in addressing the situation.

### Disclosures

16. Indicate whether you or your spouse knows the other prospective governing board members for the proposed school. If so, please indicate the precise nature of your relationship.

☒ I/we do not know these individuals ☐ Yes [Click or tap here to enter text.](#)

17. Indicate whether you or your spouse knows any person who will be a school employee. If so, indicate the precise nature of your relationship.

☒ I/we do not know any such employees ☐ Yes [Click or tap here to enter text.](#)

18. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (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 school.

☒ I/we do not know any such employees ☐ Yes [Click or tap here to enter text.](#)

19. Indicate if you, your spouse, or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
- ☒ I/we do not anticipate conducting any such business ☐ Yes [Click or tap here to enter text.](#)
20. Indicate if you, your spouse, or other immediate family members have a financial interest in the school or a financial interest with a vendor or education service provider to the school. If so, indicate the precise nature of the financial interest that you have.
- ☒ I/we do not have a financial interest ☐ Yes [Click or tap here to enter text.](#)
21. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows 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 school does not intend to contact with an education service provider or school management organization. ☐ I/we do not know any such persons ☐ Yes [Click or tap here to enter text.](#)
22. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual, or management interest in the provider. For any interest indicated, provide a detailed description.
- ☒ N/A. ☐ I/we have no such interest ☐ Yes [Click or tap here to enter text.](#)
23. If the school plans to contract with an education service provider, indicate if you, your spouse, or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, 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 [Click or tap here to enter text.](#)
24. 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 that is partnering with the charter school. 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 [Click or tap here to enter text.](#)
25. Indicate any potential ethical or legal conflicts of interests that would or are likely to exist should you serve on the school's governing board.
- ☒ None ☐ Yes

### Certification

I, \_\_\_\_\_ Dana Ciacci \_\_\_\_\_, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Commission as a prospective governing board member is true and correct in every respect. I agree to notify the Commission if there are any changes to the above disclosures.

01/18/2025

Signature

Date

Mana 'Ulu Montessori Charter Lab School

**QUESTION 17**

Describe how each member of the applicant governing board contributed and supported the development of the application

**EVALUATION CRITERIA:**

*Evidence could include, but not necessarily solely consist of:*

- *Evidence of outreach and the process the applicant governing board went through in identifying board members and selecting their roles.*
- *Specific examples of board members' contribution to this application that includes evidence from board meetings: agendas, minutes, etc.*

**NARRATIVE SECTION:**

Our application is the result of a collaborative effort, with each member of the applicant governing board contributing their unique skills and expertise to its development.

**Collective Contributions:**

In addition to their individual contributions, the board members worked collaboratively to:

- **Conduct research:** Gather data on the need for a Montessori preschool in Honolulu, analyze best practices in early childhood education, and review relevant regulations and policies.
- **Develop the school's mission and vision:** Articulate a clear and compelling mission and vision that reflects the school's values and aspirations.
- **Design the academic program:** Create a comprehensive and rigorous academic program that meets the needs of all learners and prepares them for success.
- **Establish governance structures:** Develop policies and procedures for school governance, ensuring accountability, transparency, and effective decision-making.

The collaborative efforts of the applicant governing board, each member contributing their unique strengths and expertise, have resulted in a comprehensive and compelling charter school application that reflects a deep commitment to providing a high-quality Montessori education for the children of Honolulu.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 17 – Attachment 1, Question 17 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

### QUESTION 18

What are the systems of support to address indicators of distress to address the following:

- Academic Framework
- Financial Framework
- Organizational Framework
- School leader evaluation

### EVALUATION CRITERIA:

*Evidence could include, but not necessarily solely consist of:*

- *reference to characteristics of high-quality charter schools document;*
- *reference to charter contract performance frameworks; and*
- *reference to indicators of distress (see resources page).*

### NARRATIVE SECTION:

Our charter school is committed to establishing comprehensive systems of support to address indicators of distress and ensure its long-term success. These systems will be grounded in the characteristics of high-quality charter schools, aligned with charter contract performance frameworks, and informed by the specific indicators of distress identified for charter schools in Hawaii.

### Evidence-Based Systems of Support:

#### 1. Characteristics of High-Quality Charter Schools:

- **Proactive Monitoring:** The school will implement proactive monitoring systems to identify early warning signs of distress, aligning with the characteristic of high-quality charter schools that emphasize continuous improvement and data-driven decision-making.
- **Responsive Interventions:** The school will develop responsive interventions to address identified areas of concern, reflecting the characteristic of high-quality charter schools that prioritize differentiated support and individualized solutions.

#### 2. Charter Contract Performance Frameworks:

- **Alignment with Contract Goals:** The support systems will be designed to address potential challenges in meeting the performance goals outlined in the charter contract, ensuring accountability and compliance.
- **Performance-Based Interventions:** Interventions will be tailored to address specific performance indicators, such as student achievement, financial health, and organizational effectiveness.

#### 3. Indicators of Distress for Charter Schools in Hawaii:

- **Developmental Improvement:** Declining student development, or significant developmental gaps.
- **Financial Health:** Budget deficits, operating losses, or inability to meet financial obligations.
- **Organizational Effectiveness:** Staff turnover or ineffective governance.
- **Compliance:** Failure to comply with legal and regulatory requirements.

**Specific Systems of Support:**

- **Montessori Framework:** Address pedagogical distress through professional development, mentoring, parent-teacher collaboration, and intervention programs.
- **Financial Framework:** Address financial distress through budget analysis, adjustments, fundraising, financial consultation, and reserve funds.
- **Organizational Framework:** Address organizational distress through organizational assessments, professional development, team building, governance training, and conflict resolution protocols.
- **School Leader Evaluation:** Address leadership distress through regular performance evaluations, constructive feedback, professional development, mentorship, and succession planning.

**Integration with Mixed Delivery Model:**

The support systems will be integrated with the mixed delivery model with an existing private provider and leveraging the partnership to access additional resources and expertise. This may include:

- **Collaboration with Chaminade University Faculty:** Seek guidance and support from faculty in areas such as curriculum development, assessment, and special education.
- **Shared Professional Development:** Participate in joint professional development opportunities with private provider staff to address common challenges and share best practices.
- **Access to Outside Resources:** Utilize existing Montessori network resources, with the American Montessori Society and National Center for Montessori in the Public Sector to enhance the school's capacity to address indicators of distress.

By grounding its support systems in evidence and best practices, Mana 'Ulu Montessori Charter Lab School will be well-equipped to proactively address challenges, promote continuous improvement, and ensure its long-term success in providing a high-quality and sustainable educational program for the community.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 18 – Attachment 1, Question 18 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*

**QUESTION 19**

Pending approval, describe the process that the applicant governing board will take to transition from a planning governing board to an operational governing board that ensures the school meets the approved mission and vision.

**EVALUATION CRITERIA:**

*Evidence could include, but not necessarily solely consist of:*

- *reference to characteristics of high-quality charter schools document; and*
- *reference HRS 302D-12 for suggested governing board make up.*

**NARRATIVE SECTION:**

Per HRS 302D-12, in selecting governing board members, consideration shall be given to persons who (1) provide the governing board with a diversity of perspective and a level of objectivity that accurately represents the interests of the charter school students and the surrounding community, (2) demonstrate an understanding of best practices of nonprofit governance; and (3) possess strong financial and academic management and oversight abilities, as well as human resource and fundraising experience.

Collectively, the governing school board possesses the qualities described in HRS 302D-12. These qualities that have served us well as a planning governing board will also serve us well as an operational governing board. The governing school board has executed its planning with operations in mind. Put simply, we would not have planned a particular delivery if we knew we could not operationalize it. As a collective, our experience in building schools, organizations, and systems is paired with our experience in administering and sustaining these same schools, organizations, and systems. Our governing board also collectively possesses both direct service experience (as teachers and parents) as well as experience in high-level planning and oversight (as administrators and program directors). It is this experience in delivering direct service that ensures that the high-level planning and oversight is not excessively ambitious or unrealistic when it comes time to operationalize.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

**Notes:**

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 19 – Attachment 1, Question 19 – Attachment 2, etc.*
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**QUESTION 20**

Identify the systems the governing board will put in place to monitor and evaluate the school's Mission Aligned Initiative?

**EVALUATION CRITERIA:**

*Evidence could include, but not necessarily solely consist of:*

- *Governing board monitoring process*
- *Examples of how the governing board will keep updated on student progress*

**NARRATIVE SECTION:**

The Mana 'Ulu Montessori charter school's governing board is committed to actively monitoring and evaluating our Montessori Mission Aligned Initiatives to ensure its effective implementation and impact. The board will utilize a multi-faceted approach, drawing on various data sources and feedback mechanisms, to stay informed about student progress and the initiative's overall effectiveness.

**Governing Board Monitoring Process:**

- **Regular Reporting:** The school administrator will provide regular reports to the governing board on the progress of the mixed delivery system. These reports will include data on student learning outcomes, teacher implementation, community partnerships, and overall program effectiveness.
- **Instructional Approach Review:** The board will periodically review the school's Montessori curriculum to ensure effective integration in a multi-age environment. This review will include an examination of materials and assessment tools.
- **Classroom Observations:** Board members will conduct classroom observations to witness the implementation of the Montessori pedagogy firsthand. These observations will provide insights into student engagement, teacher practices, and the overall learning environment.
- **Community Feedback:** The board will actively seek feedback from parents and community members regarding the school's efforts to promote environmental stewardship and cultural awareness through the school's initiative. This feedback will be gathered through surveys, focus groups, and community meetings.
- **Annual Program Evaluation:** The board will conduct a comprehensive annual program evaluation of the curriculum implementation, which will include data analysis, stakeholder feedback, and a review of progress toward school goals.

**Examples of How the Governing Board Will Keep Updated on Student Progress:**

- **Review of Student Work Samples:** The board will review student work samples, projects, and presentations to assess student learning, creativity, and critical thinking skills.
- **Analysis of Developmental Data:** The board will analyze student development on relevant tasks, such as those related to science, environmental studies, and cultural understanding, to measure the impact of the initiative on student developmental outcomes.
- **Community Engagement Activities:** The board will participate in and observe community engagement activities, such as field trips, work in the garden, or cultural presentations, to assess the impact of the initiative on student's civic engagement and environmental stewardship.

By implementing these monitoring processes and actively engaging with various data sources, the governing board will maintain a clear understanding of the school's effectiveness and its impact on student development and community engagement. This commitment to ongoing monitoring and evaluation will ensure that the initiative remains a vital and successful component of the charter school's

program, all aligned with the Hawaii Ethics Commission, Charter School Guidelines.

**SUBMITTING ATTACHMENTS?**

XNO. There is no attachment submitted for this question.

☐ YES. There are attachment(s) submitted for this question.

Select # of attachments number of attachments submitted.

*Notes:*

- *Naming convention: If you are submitting an attachment or attachments, please name the file(s) as follows: Question 20 – Attachment 1, Question 20 – Attachment 2, etc.*
- *Attachments must be uploaded to the ShareFile folder provided to the Applicant team point of contact.*