



**Guidelines: How To Set Up and Manage  
A Montessori School**

**SAMA Exco Collaboration  
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## **GUIDELINES FOR SETTING UP AND MANAGING A MONTESSORI SCHOOL**

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### **ACRONYMS**

SAMA - South African Montessori Association Trust  
ISASA - Independent Schools Association of South Africa  
DoE - Department of Education  
SACE - South African Council for Educators  
Umalusi (not an acronym) - Accreditation Agency for Independent Schools  
PED - Provincial Education Department  
NPO - Non Profit Organisation  
PBO - Public Benefit Organisation  
NCS - National Curriculum Statement  
ECD - Early Childhood Development

## INTRODUCTION

It is very difficult to draw up a set of prescriptive steps for the setting up of a new school as these steps depend to a large extent on the type of school that is being set up as well as the province/region in which the school will be established. The questions and guidelines that follow have been extracted from documents used by other school associations, some Montessori, some not.

It is strongly advised that the services of a highly experienced person who has been involved in setting up a new school before are sought. Consultants usually charge a fee but the investment is well worth it in the long run. You could also set up an advisory board composed of people with expertise in the following areas: finance, law, property, management, Montessori education.

Begin with the end in mind. From this vision, establish your founding principles, mission statement, aims and objectives.

You should not be establishing a school to meet present needs only. You are building a school that should last many, many years. Think about the big picture. What do you envisage the school looking like when it is completely developed? Bear in mind your final vision of the “perfect school” and then look at all the building blocks to get there.

### **Why do you want to start a Montessori School?**

Right from the beginning, you should understand that the name Montessori refers to a method of education and a philosophy of life. It is not a copyright-protected name or a franchising program. In many parts of the world, including South Africa, anyone who wishes to can open a school and call it “Montessori” with no knowledge of how an authentic program is organized or run.

For this reason, we urge you, at the outset, to be very clear about whether what you intend to open is an authentic Montessori School or a good quality day care with some Montessori aspects. If your answer is the latter, that is fine. You have a legal right to make that choice, but you have an ethical responsibility both to the Montessori community and the public who will become your customers to be honest in not calling what you do a “Montessori School”. Either way you are welcome to make use of the advice and information contained in these documents, as much of it applies to all schools.<sup>1</sup>

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<sup>1</sup> The South African Montessori Association is currently developing a statement of principles of Montessori Best Practice. Until such document is available you can contact the SAMA office for clarification of any aspects which are unclear to you.

### **Where to start:**

Starting and managing a new Montessori school takes determination and commitment. It also takes research and planning.

Draw up a business plan. If you don't know how to do this, then paying a professional to help you will be an investment you will not regret down the line.

Ensure you have sufficient capital to operate for up to a year before turning a profit.

Ensure that your starting capital allows a buffer for unforeseen contingencies. Decide on legal structure.

In South Africa there are several types of legal structures to choose from. There is no one structure, which will be best for all circumstances. Most schools start as a sole proprietorship. This is the easiest and least costly way of starting a business. A sole proprietorship can be formed by finding a location and opening the door for business.

Most day-cares in South Africa are sole proprietorships, and Montessori 3-6 schools tend to follow this model - at least initially.

You may want to consider getting legal advice on the relative advantages and disadvantages of the following:

Sole Trader

Closed Corporation

Section 21 Company

Conduct by Constitution

Trust

Non-Profit Organisation (can be a trust or an entity conducted by constitution)

(Pty) Ltd Company

All of the above have tax and administrative implications. And which legal structure will suit your school will depend on your needs. It is best to get advice from a tax consultant regarding the benefits or disadvantages of running a business from your home, as what may appear to be short-term tax benefits may end up as a big capital gains tax bill in ten years time.

### **Plan your school:**

Check that your premises (actual or planned) will comply with your local Municipal requirements before undertaking expensive alterations. Plan your capital and cash-flow budgets (get advice from someone with experience drawing up a business plan).

Check that the market will support your planned school. (A Needs Assessment will form part of your application to Social Development.)

## **Registering your school**

Early Childhood Centre:

If you only have a 3-6 class you need to register with the following bodies:

Provincial Department of Social Development

Municipal Health Department (Local)

If you have a separate Grade R class, it is necessary to register with the Department of Education.

All ECD centres are currently governed by the Children's Act of 2005 (Including The Children's Amendment Act, 2007). Regulations are still being framed in terms of this act, and in the interim the requirements of the Child Care Act of 1983 are still being applied. Once the regulations in terms of the new Act are promulgated they will supersede those of the earlier Child Care Act.

Obtain the relevant forms {Regulation 30(1)} from your Provincial Department of Social Development.

Your municipal Health Department has its own requirements which may, in some cases, be more stringent than the requirements set down by the Department of Social Development. Apply at your municipal Health Department who will send an inspector to your premises. You will then need to make application at your municipal offices for clearance from Traffic Control, Town Planning and the Fire Department. Your application will then go onto the Health Department for final decision.

You will need to ensure that if you are purchasing a property with the intention of setting up a school, it is advisable to contact your municipality to find out about zoning requirements. This is also applicable if you are planning to lease a property. Any building alterations need to also comply with municipal requirements.

In summary, the **LEGAL REQUIREMENTS FOR REGISTRATION** are as follows:

All schools, including early childhood development centres (ECD) are required to register with and comply with regulations set by:

Department of Health

Department of Social Development

Municipal Zoning/Land Use Departments

In addition, those offering education that is part of formal schooling (currently grade 1 to grade 9; from 2010, grade R will be incorporated into the formal schooling sector), are required to fulfill the above requirements and:

Register as an Independent school with PED  
Ensure staff is registered with SACE  
Apply for and maintain accreditation with Umalusi.

**When Employing Staff:**

**Legalities:**

If you are going to employ staff you need to be aware of the following legislation/bodies and the implications thereof:

- **South African Revenue Service:**  
You need to register as a provisional taxpayer yourself.  
You need to register as an employer.  
You need to ensure that all your employees are registered.
- **Unemployment Insurance:**  
You need to register as an employer.  
You need to register all your employees as contributors.  
(**Note:** If all your employees fall below the tax threshold, you pay UIF directly to the UIF offices, if you are deducting SITE or PAYE from employees, you can pay the UIF to SARS together with the tax deductions.)

You may also be required to contribute towards Skills Development Levy - this is dependent on your gross annual salaries. Contact SARS for current legislation.

All employers in South Africa have to comply with the requirements of the Basic Conditions of Employment Act (1997) and the Employment Equity Act, 55 of 1998. It is advisable to make yourself aware of the terms of this legislation before advertising for staff, as it can be difficult and costly to remedy mistakes after an employment decision is made.

**Practicalities:**

Decide on what staffing you will need.  
Ensure that teaching staff has adequate, relevant training.

You will need to have job descriptions and a grievance/disciplinary policy ready to submit with your application to the Department of Social Development.

## **OTHER QUESTIONS TO BE CONSIDERED**

### **TYPE OF SCHOOL, LEARNERS and COMMUNITY**

What stages of development do you intend to cater for, how big do you want the school to grow to and how quickly do you want it to grow?

Infant/Toddler Programme (18 month to 3 years)

3-6 Environments

6-9 / Lower Primary Environment

9-12 / Upper Primary Environment

12-15 / Erdkinder / Middle School Environment

15-18 / Erdkinder / High School Environment

What will the medium of instruction be? It is required that schools have a Language of Learning and Teaching (LOLT) Policy.

What will be maximum class-size for each phase? Research international Montessori norms for guidelines to this.

How many environments will the school have ultimately?

What will the child: teacher ratio ideally be? Again, research international Montessori models to identify your ideal number. Bear in mind that this is usually higher in an established/normalised Montessori environment.

What community will the school serve?

Will the target market deliver enough students to enable the school to reach its maximum number of students?

Can your target market afford the fees you envisage?

What other communities could be targeted to recruit more students?

Will the school provide boarding? Particularly applicable for Middle School and Erdkinder programmes.

What other schools will the school be competing with for student? Look at the area you intend setting up in - is there a market for more schools?

How will you implement a Montessori curriculum and recommended Best Practice?

How / Will you provide for extra-murals, sport, all the extras that perhaps other schools offer? Is this important to your vision? Either way, create a statement that explains your position.

What will the school have in order to attract parents and students?  
Presumably this will be Montessori inspired but how? There are hundreds of 'Montessori' schools already. What will make your school viable and sustainable?

What staffing will you require in order to run and operate an authentic Montessori school?

What facilities will you need for your school?

How many classrooms will you need?

How many specialist rooms will you need - art, music, drama, science, technology? Will these be accommodated in the prepared environment or will you need additional space?

What other facilities will you provide - fields, courts, pool, ablution, hall, canteen/tuckshop, storage, locker rooms, offices (for admin and for teachers), maintenance yard, and parking?

What about infrastructure - electricity, water, sewerage, roads, security?

In almost all schools - small, home-based or large, stand-alone schools – You will need to obtain municipal/council consent and/or permission to operate the school from the particular property. You will need to contact your local council for these conditions and requirements. This is your first legal requirement. All other registrations will depend on this being in place.

## **GOVERNANCE**

Whether or not you have a Board (Governing Body) will depend on the legal structure of your school, and whether or not you fall under the South African Schools Act (i.e. you go beyond 3-6). You need to ask the following questions:

What governance structure are you intending to have?

Who will be appointed?

How?

How democratic will the Board be?

What will be the role of parents?

What are the responsibilities of the Board and of the Chair of the Board?

Refer to the South African Schools Act for details on actual requirements as well as those required of the Provincial Department of Education.

## **STAFF**

How do you propose to remunerate your teachers?

What will the benchmark for conditions of service be?

Do you have a contract in place that supports Labour Law requirements?

What qualifications will you require your staff to hold? As at November 2008, it is required for ECD Practitioners to hold a minimum NQF level 4

qualifications. All educators are required to be registered with the South African Council for Educators (SACE) – conditionally, provisionally or fully.

What opportunities will you provide with regard to further training and continued professional development?

What conditions of service will you offer – pension, medical aid, housing, 13<sup>th</sup> cheque, assistance with children's education, leave?

## **HEAD OF SCHOOL**

What sort of Head will you be looking for to start up your school?

An experienced person who has an established track record?

A new Head who costs a lot less and who can grow with the school?

A person who has experience of developing a campus?

A person with marketing and business skills?

What level of salary package are you envisaging for your Head?

What will the Head's responsibilities be – has a job description been drawn up?

## **INSURANCE**

Remember to consider insurance (public liability as well as the basics like fire, theft etc)

Accident Cover also exists to protect learners and staff.

## **FEES**

How will you calculate your fee structure?

What will be included in the fees – tuition, remedial assistance, books, transport, after-care, outings, and examination fees?

How will your fees be payable? Annually, termly, monthly, discounts for early payment, penalties for late payment?

What policy do you have regarding debtors?

Do you have a contract in place for parents?

How will you fund the capital development costs of setting up the school?

Desk fee, refundable deposit, debenture scheme, special levy?

Where will you go for development finance?

What security will be required?

What provision have you made for start-up costs?

What provision have you made for furniture, equipment and IT hardware?

Where will you source your Montessori materials?

What plans do you have in place to show parents your intention to grow materials, resources and equipment?

How will you market the new school?

Who will do this?

It is advisable to purchase your Montessori materials from a reputable supplier of Montessori equipment. Many of these suppliers are associate members of SAMA.

Please also read the NAISA RIGHTS AND RESPONSIBILITIES OF INDEPENDENT SCHOOLS. There are some useful guidelines applicable to all independent schools (available on the SAMA website).

## **Some basic rules, truths and advice (Extracted in part from ISASA Guidelines for Setting up a New School)**

Operating income must be met by fee income. One cannot balance the books through fund-raising. There are also laws and regulations governing fundraising activities that you must be familiar with.

Teachers and parents will only put up with poor or inadequate teaching facilities, low salaries and a thin programme for a short while. The honeymoon period is only about two years.

As a rough guide, the breakdown of operating expenses could look like this:

Teachers' salaries (including the Head)	70%
Educational expenses (books, materials and departmental expenses)	10%
Administration expenses	10%
Grounds and maintenance expenses	7%
Surplus	3%
<b>TOTAL</b>	<b>100%</b>

By working out the number of teachers and determining the salary bill, one can arrive at a figure that represents 70% of the total amount that will be needed. This will inform the setting of fees.

Setting fees too low, leaving out key aspects of compensation (such as pension, medical aid and 13<sup>th</sup> cheque) creates mountains to climb later on.

Schools starting out tend to be too democratic when it comes to allowing parents to have their say or their way. This often comes back to haunt them when the school grows.

New schools should decide on how many students would make the establishment of a new grade viable. They should only agree to open a new grade if this critical number has been reached.

Schools demand space. An area of between 6ha and 12ha is desirable. Building on too small a site creates enormous pressures later on when the school grows. Plan for the future.

## Action – getting started

- Set up a steering committee, preferably with someone on board who has travelled the road previously.
- Do a feasibility study – what numbers can we expect, will the community support the school, what other schools exist in the area, what facilities are available for the school to use at present?
- Draw up a provisional mission statement – preferably in conjunction with the founding Head.
- Register the school with the Provincial Education Department
- Set up the legal structures – register the company/trust, apply for NPO and PBO status where applicable.
- Apply for membership of the school with SAMA and other organisations such as ISASA (optional but recommended – these organisations are familiar with the South African education landscape and can support you).
- Draw up a constitution for the above legal entities as well as for the Governing Body.
- Draw up a financial model that demonstrates clearly the anticipated cash flow over the first five years and the anticipated budget for the same period.
- Draw up legal documents relating to the capital payment requirement that has been selected.
- Investigate the possibility of application for subsidy.
- Investigate current remuneration levels paid through SAMA, ISASA and PEDs and establish a salary structure.
- Make application to set up pension and medical aid schemes, if applicable.
- Draw up financial management guidelines and checklists.
- Plan to advertise and recruit the right Head. Probably the key decision to be made.
- The Head ideally should be appointed as soon as the feasibility study has been completed as s/he should be involved in the planning of facilities, drawing up of policies, appointment of staff, etc.
- Ensure that the incoming Head is aware of the following:
  - PED guidelines for Independent schools
  - Policies on rights and responsibilities of Independent schools.
  - Various associations' conditions for membership, including requirements for membership and the code of ethical practice.
  - SACE regulations about requirements for teacher registration.
  - Examination centre registration details if applicable.
  - Umalusi requirements.

<b>ontact</b>	<b>SAMA</b>	<b>Umaluzi</b>	<b>ISASA</b>	<b>SACE</b>	<b>Dept. Education</b>	<b>Dept. Health</b>	<b>Dept. Social Dev</b>
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