

From: oeo@uwsa.edu
To: [Office of Educational Opportunity](#)
Subject: New RFP Phase 1 submission from Phase I Application: Prospectus
Date: Friday, December 8, 2017 4:15:24 PM

Name of Organization

Innovative Schools Network

Year Founded

2,012

First and Last Name of Primary Applicant

Lynn Munsinger Brown

Address

5208 MCKENNA RD
MONONA, Wisconsin 53716
[Map It](#)

Email

lmunsing@gmail.com

Phone

(608) 556-9682

Provide the names, professional affiliation (current job), and role in the proposed school for all school leaders and board members.

Name	Professional Affiliation	Role in Proposed School
Lynn Munsinger Brown	Product Management Director, Oracle Corporation	Planning Member
Melissa Rosenkranz, Ph.D.	Associate Scientist, Center for Healthy Minds, UW-Madison	Planning Member
Dr. Heather Terrill Stotts	Executive Director, Innovative Schools Network	Planning Member

Purpose and brief history of organization (For instance, is this a new non-profit created for this proposed school, or is it an existing non-profit seeking to expand or replicate its portfolio?)

Innovative Schools Network (ISN) is a nonprofit, 501(c)(3) organization led by a group of professional educators that supports the establishment and growth of high quality, research-based innovative schools by providing professional training and guidance, and ensuring that educators can easily collaborate, connect, and learn from one another.

Lynn Munsinger Brown and Melissa Rosenkranz are not employees or contractors of ISN, but have cultivated a relationship with ISN around innovative schools over the past several years. We worked jointly with Heather Terrill Stotts on this proposal to leverage the skills and experience of each planning member, including the vast knowledge of charter school implementation that ISN brings to the table.

Evidence of Wisconsin Incorporation and IRS 501(c)(3) status

- [Filed-Articles.pdf](#)
- [Filed-Articles-of-Amendment-Name-Change.pdf](#)
- [501c3-Determination-Letter.pdf](#)

Do you currently operate a school?

No

Is your proposal a

Fresh Start Campus (Totally new school)

Where would the school be located?

Madison

When would students first enroll?

Academic Year 2018-2019

Are you applying for a charter with any other authorizers this year? If yes, please list the authorizer(s).

No

Have you applied for authorization of this concept before?

No

Attachments

- [Arbor_Community_School-Phase-1-Prospectus-Part-B.pdf](#)

Arbor Community School

*Supporting the Growth and Wellbeing of Independent Learners
and Culturally-Rich Communities*

1. Mission/Vision Statement for the Charter School

a. What is the mission of the school?

The mission of Arbor Community School is to build an enduring foundation of wellbeing for all learners through education of the mind, brain, and body, in preparation to become citizens of a global future and a changing world.

b. In one sentence, what makes the school different from existing tuition free, public options?

The instructional strategy (Project Based Learning; PBL) and curricular foci of this school will emphasize mental and physical wellbeing and foster the development of 21st century skills, such as resilience, self-efficacy, collaboration and communication, intrinsic motivation, and leadership, while traditional content (such as math and literacy) will be woven into student-led projects.

c. Five years after opening, what does success look like?

Success criteria:

- **Students** are at the center of learning, collaborating with teachers and their community to build a lifelong love of learning. Students explore the world through interest-based play and intentional projects, learning both independently and collaboratively. Students' high level of involvement kindles their natural desire to learn and they are increasingly engaged. Students view challenges as opportunities and respond to failure with openness and curiosity.
- **Teachers** are deeply trusted and valued to facilitate and support learners. Teachers share best practices and create collaborative partnerships with parents and other stakeholders. Teachers are empowered to innovate in the areas of behavior management, teaching methods, and have the autonomy to apply curriculum flexibly to meet the day-to-day needs of individual learners.
- The school **community** (students, parents, and teachers) relate to each other with compassion and kindness as they participate in restorative justice processes. The community supports learners who set and reach goals to identify and solve problems in

their school community, as well as in the larger community. Community partnerships bring increased relevance and authenticity to projects and experiential learning.

- **Equity and diversity** are valued and celebrated keys to school success. Students, teachers, and parents work together to address all types of academic and social segregation and remove barriers to equity.
- **Movement** and time spent outside in nature is maximized and integrated into lessons and learning throughout the day to ensure content is understood deeply and remembered readily.

Progress toward these (non-academic) goals will be measured both subjectively (parent/teacher/child surveys) and objectively with standardized behavioral measurements that assess frustration tolerance, innovation in problem solving, cooperation, and confidence.

d. How would the school increase educational equity, incubate innovations, and/or increase the use of underutilized best educational practices?

This school turns traditional education on its head. Whereas traditional models make core proficiencies and content primary, with the logic that they will ultimately lead to success and thus wellbeing, this school develops a strong foundation of wellbeing, resilience and curiosity as prerequisites for sustainable success and flexible application of core content. In this way, this school model will increase student engagement and directly address obstacles to learning, such as difficulty maintaining attention and impulse control, that frequently hinder progress in learning for children from disadvantaged backgrounds. Further, the project/problem focus of the curriculum will provide agency and meaning to the acquisition of otherwise traditional skills, resulting in greater motivation and intrinsic value as students learn to tackle problems and projects that are important to them.

Many school districts introduce projects, personalized learning, or mindfulness practices alongside existing curriculum, but access is limited by classroom or building, and often these “extras” are only available to very advanced or struggling students. Moreover, these approaches are not infused into students’ education, but rather are typically occasionally sprinkled into an otherwise prescribed and rigid curriculum. Our school seeks to immerse students in these opportunities in a public school setting at no additional burden to families, beginning at Kindergarten.

2. Description of the school/program.

a. Age range(s) and grades to be taught:

b. Projected number of students, pupil teacher ratios and general staffing patterns:

Year	Grades Served	Students per classroom	Total Students	Teachers *	Student: Teacher Ratio
1	K-3	2 sections K-3: 20 students each (10 students each in K-3**)	40	2	20:1
2	K-4	2 sections K-2: 15 students each, 1 section 3-4: 20 students	50	3	K-2: 15:1, 3-4: 20:1
3	K-5	2 sections K-3: 20 students each, 1 section 4-5: 20 students	60	3	K-5: 20:1
4	K-6	2 sections K-2: 15 students each, 1 section 3-4: 20 students, 1 section 5-6: 20 students	70	4	K-2: 15:1, 3-6: 20:1
5	K-7	2 sections K-3: 20 students each, 1 section 4-5: 20 students, 1 section 6-7: 20 students	80	4	K-7: 20:1
6***	K-8	2 sections K-2: 15 students each, 2 sections 3-6: 20 students each, 1 section 7-8: 20 students	90	5	K-2: 15:1, 3-8: 20:1

* Additional part-time staff may be employed for community engagement and administrative support as necessary.

** Ideally 10 students enrolled per grade level. Increasing a grade each year to accommodate previous year's oldest students, and enrolling 10 new Kindergartners each year.

*** Additional year shown to indicate school's complete growth pattern.

c. How students will be recruited and general admission policy:

General admission policy:

As a public charter school authorized by the UW System Office of Educational Opportunity, Arbor Community School would be open to all students in the greater Madison area. As per state law, a lottery will be held annually for available slots based on enrollment projections. Founding members of the school can opt to bypass the lottery process for their legal children, as allowable under state charter law.

Recruitment:

In order to ensure racial and economic diversity we will recruit heavily in schools, preschools, and neighborhood community centers with high percentages of students that qualify for free and reduced lunch (low SES), and high populations of non-white students. We will also form partnerships with community organizations that serve underprivileged children and their families, as well as those that serve and are trusted by racial minority groups. For example, we will use our existing community connections to host information sessions at Bridge Lake Waunona Neighborhood Center, Vera Court Neighborhood Center, Goodman Community Center, Warner Park Community Center, and where allowed, we will set up informational tables at these centers and at events that draw racially and ethnically diverse attendees, such as free events at Aldo Leopold Nature Center, fundraisers for Big Brothers Big Sisters of Dane County, and free attendance nights at the Madison Children's Museum.

By year 6, we aim to serve 90-100 students, grades K through 8. Our aim is to enroll a fairly even number of students from each age range, so if necessary we will have separate lotteries each of the grade range sections described in the table above.

d. Special issues or characteristics of the school:

This school will employ a multi-age framework, consisting ultimately of classrooms of 5-7, 8-10, and 11-13 year old children. The timing of the school day will be developmentally appropriate.

4. Philosophy of this school in relation to organization, curriculum and instructional strategies:

The focus of Arbor Community School is to foster strong wellbeing in its students and community through an education that is predicated on its purpose and meaning in the lives of its students and their families and neighbors. Our goal is to provide an education with equity that prepares children of all backgrounds to be active, resilient, and successful participants in our rapidly changing world.

The educational model is project-based and problem-focused learning, where to a large extent, students decide what projects and problems they want to tackle. Teachers will provide guidance and support, as well as monitor progress. In younger children, more support and guidance is necessary, but our goal is to develop self-direction and reflection from the earliest ages. Multi-age classrooms also provide opportunities for students to explore different roles, leading and following at different times, and to routinely notice growth in themselves and their peers.

At least one project each year will address a problem in the community. From these experiences, students will learn that the skills they are learning can be applied right now and that they can have an impact in their community. As children begin to understand that they can be agents of change, intrinsic motivation, curiosity, and enthusiasm naturally follow.

In a project-based model, students learn to advocate for themselves and their projects, to cooperate and communicate clearly and effectively, and to problem solve. They will be invited to apply these skills beyond their projects to contribute to developing and articulating learning goals and to fostering peace, justice, and equity in the school environment and governance decisions.

Learning will take place outside the classroom as much as inside; moving, exploring the natural world and interacting with the community. Likewise, frequent invitations will be offered for the community to participate in school activities, project presentations, and eventually health and wellbeing-related education. With a focus on wellbeing, Arbor Community School will have the opportunity to be an ambassador for wellbeing in the community.

Teachers will be supported in their roles as guides and provided ample time to plan, process, and reflect upon the learning goals students are achieving throughout the year. They will model the same innovation, creativity, independent thinking, and cooperative energy they foster in the classroom, by employing a decentralized system of organization. Teachers will form a cooperative and share best practices and ideas, and will also share joint responsibility for accountability and outcomes. The cooperative will develop its own norms and procedures to make decisions and perform administrative duties. In this way, teachers will have autonomy to purchase materials, plan outings, and will be entrusted with the responsibility to make decisions about how they run their classrooms. The multi-age model further encourages this structure as teachers connect deeply with students, their learning styles, and their families over the course of multiple years.

5. The curricular focus and instructional strategies that will define the nature of the school:

The school will use a multi-age structure and project/problem-based learning strategies. The curricular focus of the project/problems will be personalized, to an extent, but also emphasize civic engagement, environmental and social justice themes. The curriculum will meet DPI's newly designed Social Emotional Learning standards, and will leverage local mindfulness and yoga experts and utilize publicly available resources such as the Kindness Curriculum. (<https://centerhealthyminds.org/news/kindness-curriculum-released-for-greater-well-being-in-the-classroom>). The Kindness Curriculum is a 12-week, freely available program designed for preschoolers, but easily adaptable for use with older children. The program is implemented by classroom teachers and is designed to develop emotional awareness and prosocial skills, like kindness and forgiveness.

Within this context, traditional subjects—such as science, math, reading, writing and the arts—will be integrated and woven into authentic educational experiences. For example, to answer a project-based “driving question” around food systems in our community, students could plant and tend seeds in an outdoor garden, harvest and prepare the food and then share a meal together. Botany and chemistry would be integrated as students learn experientially about seeds, soil, compost, planting and growth. Math, geometry, and chemistry would be explored as students plan and construct a planting area, experiment with recipes, and learn about the cooking process. History and geography are taught as students learn about agricultural methods throughout human history in different parts of the world. Language arts would develop as students read about caring for their plants and record observations and reflections in a journal. Art and imagination are incorporated as students paint pictures of their garden or present a play about what they've learned. Throughout the project, social emotional learning opportunities abound. Critical thinking skills are sharpened as students develop opinions about sustainability. Communication and teamwork are practiced as students work together to construct a garden bed and explain their findings of plant growth rates. Resilience is built as teams try, fail, and try again to help plants thrive. Discussing how food systems and nutrition affect different populations raises social justice awareness. And social skills and kindness are honed as students share an intentional meal together and donate extra produce to a local food pantry.

6. Methodology by which this program improves the educational opportunities and outcomes for students. What evidence exists that suggests this model has demonstrated positive achievement outcomes?

Because the Arbor Community School model incorporates the interests and passions of students to guide content in the pursuit of core proficiency, it will foster imagination and creativity, self-reflection and cultivation of meaning and purpose, self-initiation and direction.

This model relies on projects and problems with real-world applications as the vehicle for learning. Because the outcomes of these projects have real value and meaning, learning becomes a primary reward with intrinsic value, rather than a task to be accomplished in exchange for grade or token. This approach has recently been endorsed by Gloria Ladson-Billings, UW Professor of Curriculum & Instruction and National Academy of Education President, for increasing efficacy of educating students of color and making learning relevant to students.

Further, projects are completed in groups, building collaboration and emotional intelligence. By nature of the “project” or “problem” focus, they also incorporate planning and organization skills. When a project does not go as planned, problem-solving, creativity and flexibility are necessary. Ultimately, some projects will fail, providing opportunities for critical thinking and resilience building. These skills provide the experience and tools that allow students to act on their self-efficacy (for review see Bell, 2010; Thomas, 2000). This *well-equipped* self-efficacy provides the basis for achieving the components of high psychological wellbeing and making meaningful contributions in the modern world. It will also serve to protect against the depression, anxiety and apathy that have become endemic in young adults (Bandura, 1993; Komarraju & Nadler, 2013; Newman, Dantzler, & Coleman, 2015; Nie, Lau, & Liao, 2011; Wurdinger & Rudolph, 2009; Zuffianò et al., 2013). This is in contrast to the current model of education, which provides the content without the opportunity to apply it in meaningful and impactful ways on a daily basis (Blumenfeld, Hamilton, Bossert, Wessels, & Meece, 1983).

While these models do not necessarily promote physical health directly, they do directly entrain habits that promote physical health, such as self-regulation, self-efficacy, critical thinking, and resilience (Galla & Duckworth, 2015). For example, these habits of mind are important for maintaining a healthy diet and exercise routine and for avoiding abuse of drugs and alcohol. Further, these models of education can incorporate content related to physical health in a much more comprehensive and experiential way than current models, which has been shown to lead to increased translation of this knowledge into student’s health-related choices (Dudley, Cotton, & Peralta, 2015). For example, in this proposed school, a food-based curriculum could be incorporated in which students plan, grow, and harvest food, and then plan, prepare, and share meals using that food. This one example incorporates healthy eating, movement, planning and organizing, problem solving, and relationship building. Finally, psychological wellbeing and ability to contribute meaningfully have well documented impacts on physical wellbeing (Kemp & Quintana, 2013; Patton et al., 2016; Steptoe, Deaton, & Stone, 2015), and in these ways, this model of education will foster the necessary conditions for success. Moreover, students educated in this way often improve in conventional metrics of academic success (grades, standardized test scores), as well (Bell, 2010; Geier et al., 2008; Komarraju & Nadler, 2013; Newman et al., 2015; Zuffianò et al., 2013).

7. The proposed governance structure for this school and how educators, students, families, and community leaders will participate in a meaningful way:

The governance council will consist of not less than five nor more than seven voting members with expertise that supports the vision of the school, including members from the private and public sectors both within and outside of the field of education. The governance council will include parent(s) or guardian(s) of Arbor Community School students, educators, and community members. The governance council will strive to maintain a diverse and non-discriminatory board that represents the whole of the greater Madison community, and as per state statute, no more than a minority of the governing board's members may be employees of the charter school [§118.40(4)(ag), Wis. Stats.]. Additionally, volunteer committees chaired by governance council members and staffed with parents and community volunteers will be formed to support school goals including diversity and equity, community outreach, and funding committees.

The planning team will recruit and establish governance council members. Teachers will be hired to continue design of the school and curriculum, as the governance council implements marketing, enrollment, and financial plans. As the school is opened, teachers will transition to a collaborative team (in lieu of an administrative head) to implement daily curriculum and school operations.

8. The financial capability of the organization seeking the charter and the relationship between the charter school and the host organization:

The planning team is utilizing well-established relationships with community organizations and has been consulting with educators with extensive PBL experience. Thus, startup costs related to research of best practices and exploring sources of professional development are minimized as the planning team and potential teachers draw from existing contacts, knowledge and experiences. Still, additional monies will be required to fund capital and non-capital expenditures such as stipends, furniture, teaching materials, and marketing materials. The governance council will seek to secure funding through a state DPI charter schools implementation grant. Additionally, the council will seek external funding nationally, as well as in the community, and will accept donations as a non-profit entity.

9. The potential location of the school:

The location of the school is critical to its success. The school's location will be selected and scored based on the following criteria:

1. Availability and cost
2. Accessible to racially and economically diverse population in greater Madison area, including proximity to multiple modes of transportation including a bus line.
3. Access to extensive natural area, such as Aldo Leopold Nature Center or the UW Arboretum. Alternatively access to green space that can be cultivated.
4. Access to a commercial kitchen

The planning team is currently working to secure a location for the school. The ideal location will be in or near the city of Madison, but not necessarily within the Madison Metropolitan School District. The top choices at the time of writing include Aldo Leopold Nature Center in Monona, the Bridge Lakepoint Waunona Community Center in Madison, and the Vera Court Community Center in Madison.

10. Evidence of support from the community:

The vision of this school has been cultivated by and for a community of parents and other change-championing community members over a period of several years.

This particular model has been thoroughly advised by a team of experts, including 4 education researchers and professors, 2 leaders from the Innovative Schools Network, and 3 leaders from the WCER Network, and 2 additional experienced charter school developers.

Conversations in the community have been thorough. We have met with leaders from 2 school districts, 3 private schools, 5 location options, and have held listening sessions. Parents and community members alike have expressed dissatisfaction with their options for public education and support a focus on wellbeing. We maintain a mailing list of over 60 Madison-area parents and community members who are interested in this model of education for their children. To date we have not initiated a social media campaign in order to tightly control the flow of information. However, when the model was presented to the Monona Grove School District in 2016, a survey was sent to all district families and the results of that survey indicated overwhelming support of this model, regardless of location. The survey is property of MGSD but further information may be available upon request.

11. Business plan for school development and first-year operation:

January - May 2018

- Establish Governance Council
- Develop communications and marketing action plan
- Develop charter school contract
- Host community outreach and parent information sessions
- Initiate fundraising plan and complete implementation grant proposal
- Attend ISN conference, visit additional model schools as appropriate
- Recruit, interview, and hire staff
- Formalize community partnerships
- Accept Applications and Determine Enrollment – Hold Lottery

June - August 2018

- Develop behavior management plan
- Staff Professional Development with ISN Consultant (Developing Positive Culture, Social Contract- Behavior, Project-Based Learning, Personalized Learning Plans, Final School Design, First 30 Days Plan)
- Governance Council Professional Development with ISN Consultant (accountability, community engagement, policy and contract development, self-assessment of council)
- Finalize curriculum and standards alignment
- Finalize facility specifications - order furniture and supplies
- Finalize school design (handbook, forms, policies, schedule, etc.)

AY 2018-2019

- Develop and nurture school culture
- Foster community and parent involvement
- Implement summative assessment for learners and educators
- Host community events (open house, nature fair, etc.) to ensure transparency and understanding of this school as an exemplar of independent public charter schools
- Share best practices and lessons learned across charter and district schools
- Teacher renewal guided by Academy for the Love of Learning

12. Potential subcontracts that might be part of the school's operation:

The Innovative Schools Network will serve initially as the not-for-profit entity under which our board will operate.

The Innovative Schools Network will also provide professional development to our staff and board.



The Center for Healthy Minds and/or The Academy for the Love of Learning will provide professional development to our staff.

The Institute for Personalized Learning at CESA 1 will provide workshops on personalized learning.

The Aldo Leopold Nature Center may provide nature-based curriculum and professional development for staff.

The Breathe for Change organization will provide yoga teacher training for our staff.

Patrick DePula of Salvatore's Tomato Pies may provide meal planning and food vendor coordination services.

Vitruvian Farms may provide fresh produce for meals and education and the Vitruvian Foundation may provide programming for sustainable farming, food pantry support, and a school garden.

Prospectus Rubric

School/Organization	Arbor Community School / Innovative Schools Network
Reviewer Name	Gary Bennett, Director OEO

Directions: Please use this rubric to guide your review of the prospectus. Responses must be submitted to the Office of Educational Opportunity electronically. However, you may record your responses electronically or in handwritten form. If you use handwriting, please scan your reviews and then submit the form electronically. As a reminder, prospectus approval does not result in authorization of a school.

A. Mission & Purpose: Is the mission/purpose of the school clearly stated?	
	Mission/purpose is clear, focused, compelling and likely to produce high-quality educational outcomes.
X	Mission/purpose is likely to produce high-quality educational outcomes.
X	Mission/purpose expresses clear guiding principles.
	Mission/purpose is evident throughout prospectus.
	Mission/purpose is ambiguous, vague, or otherwise not compelling.
	Mission/purpose are absent from application. (Dispositive of application. No need to proceed to subsequent sections for review.)
Comments	During a Phase 2 application, the applicant may need to provide clearer mission concepts and more concrete guiding principles to survive a Phase 2 review.
B. Does the mission/purpose reflect the objectives of the Office of Educational Opportunity? (Multiple may apply.)	
X	The prospectus includes programs that are innovative in meeting the educational needs, interests, and/or demands of the community.
X	The prospectus includes programs that will serve at-risk student populations.
X	The prospectus includes programs that support effective instruction based on research literature or demonstrated best practices.
X	The prospectus includes programs that will advance efforts to reform public education.
x	The prospectus includes programs that incubate new ideas or would develop innovations to current best practices.
x	The prospectus includes programs that would expand educational equity.

Comments	Additional evidence of research supporting the concept and or similar innovations would strengthen a Phase 2 application.
----------	---

C. Does the prospectus include a school design that is complete and well thought out?	
General Comments	Yes, however OEO has concerns about the ability of the applicant to secure a viable facility to meet the mission/vision of the proposal. Additional information for the location will be crucial for a successful Phase 2. It is possible the applicant should consider a 19-20 start date rather than an 18-19 opening.

<p>Yes or No & Provide Comments</p> <p>No</p>	<p>Does a similar school exist in the area? If yes, are there admissions barriers to the existing school that preclude universal access, e.g., discriminatory admissions practices such as mandatory prior curriculum, competitive admissions, or set-aside seats based on students' zip code of residence? <i>(Potentially dispositive of application based on discretion of OEO's Director.)</i></p> <p>Although similar piecemeal concepts exist, there no PBL focused school choice available to area students, families, and educators.</p>
--	--

D. Does the prospectus have a clear curricular focus? (Both may apply)	
	<p>Core content area described, including curriculum, are either research based or proven by best practices used in school with positive student, family, and/or educator outcomes.</p>

X	The prospectus includes a description of the instructional program that explains how the school's curriculum is aligned to state standards or will be aligned.
Comments:	Additional detail asked for in the Phase 2 process should uncover additional information about core content, curriculum, and practices.
E. Does the prospectus include a methodology that is likely to lead to positive outcomes for students, educators, and families? (Multiple may apply)	
X	Description of why the curriculum was chosen and evidence of its success with the targeted population.
	Methodology supported by research or best practices.
X	Proposal includes evidence of support of the model from professional educators.
X	Proposal includes evidence of support from students / families interested in the school.
Comments:	Additional evidence about PBL as planned to be used by the school is needed.
F. Does the prospectus include a governance structure that is adequate to carry out the proposed mission? Is family/community and educator participation sufficiently described? (Multiple areas may apply.)	
Partially true, but see comments.	Proposed board members include a wide range of expertise, e.g. education stakeholders, management, financial planning/management, law, and community outreach.
	Clear description of transition from planning team to operating team is included.
X	Plan includes meaningful involvement of families/community in governance of the school.
X	Plan includes meaningful involvement of educators in governance of the school.
Comments:	OEO requests information about any transitions from a WISN Board to a secondary board.

G. Does the prospectus include evidence the organization has the financial capability to plan, develop, and operate the school? (Multiple may apply)	
x	The prospectus includes evidence there is an adequate and reasonable plan to manage startup costs without complete dependence on federal or private funds.
	There is a plan for raising funds needed beyond 2(x) per pupil funds.
X	The financial analysis appears to be realistic and the proposers gave adequate consideration to primary elements of a business plan including marketing, student recruitment, and fundraising.
X	Financial concerns exist and are described below.
Comments:	Additional information about human resources expenses, gap financing for transportation, facility options, and FFE costs will be requested during the Phase 2 process.
H. Is the business plan well thought out and likely to lead to a successful initiation of the school?	
Comments:	Yes, but additional details will be needed in terms of fundraising and expense estimates.
I. Prospectus's strengths	
Comments:	The application includes a succinct mission and vision that reflects prior discussions about the applicants proposal.
J. Areas of concern / need improvement	
Comments:	<ol style="list-style-type: none"> 1. Facility: The applicant includes several options, but no specific location. 2. Special Education Planning: Detailed discussion about plans to comply with state and federal education protections will be requested during Phase 2.
K. Do you recommend the school/organization proceed to Phase 2? (Yes or no)	
Yes	

December 21, 2017

Gary Allen Bennett
Office of Educational Opportunity
Van Hise Hall
1220 Linden Drive
Madison, WI 53706

Arbor Community School / Innovative Schools Network
Lynn Munsinger Brown
5208 MCKENNA RD
MONONA, Wisconsin 53716

Dear Arbor Community School / Innovative Schools Network Stakeholders,

The University of Wisconsin System's Office of Educational Opportunity ("OEO") received a Prospectus Phase 1 application from you on behalf of Arbor Community School / Innovative Schools Network on December 8, 2017.

Congratulations, your Phase 1 Prospectus is approved. Based on this approval, you are invited to prepare and submit a Phase 2 Application related to your Phase 1 Prospectus. As a reminder, approval of a Phase 1 Prospectus is not an offer for a charter and does not create or transfer any liability to OEO or any University of Wisconsin System Administration entity.

Please review and submit the attached Phase 2 Application with the following deadlines in mind:

1. The Phase 2 deadline depends on which year you seek to first operate:
 - a. Applications must be submitted by no later than January 2, 2018 for AY 18-19
 - b. Application must be submitted by no later than September 7, 2018 for AY 19-20
 - c. Late submissions are automatically rejected without exception.
2. OEO's February 1 DPI Notice mandate
 - a. If you intend to operate starting AY 18-19, then OEO must submit intent to authorize notice to DPI no later than February 1, 2018.
 - b. If you intend to operate starting AY 18-19, then OEO must submit intent to authorize notice to DPI no later than February 1, 2019
 - c. Late notice to DPI is not allowed in accordance with Wisconsin law.

Please feel free to contact me if you require any guidance with your Phase 2 Application.

Sincerely,

Gary Allen Bennet J.D. / M. Ed.
Director, OEO

PHASE 2: APPLICATION REQUIREMENTS

0.00 ABSTRACT Provide a basic overview of the proposed school, including how the campus would increase educational equity, incubate instructional or curricular innovations, and/or increase the types of best instructional practices available to students. (LIMIT: 1 page)

ABSTRACT

The focus of Arbor Community School is to foster strong wellbeing in its students and community through an education that is predicated on its purpose and meaning in the lives of its students and their families and neighbors. Our goal is to provide an education with equity that prepares children of all backgrounds to be active, resilient, and successful participants in our rapidly changing world.

The educational model is inquiry-based and problem-focused learning (IQ-PBL), where to a large extent, students decide what projects and problems they want to tackle. Teachers will provide scaffolding, guidance, and support, as well as monitor progress. In younger children, more support and guidance is necessary, but our goal is to develop self-direction and reflection from the earliest ages. Multi-age classrooms provide opportunities for students to explore different roles - leading and following at different times, and to routinely notice growth in themselves and their peers. Multi-age classrooms also provide continuity year to year, which is helpful for students who have a difficult time with transitions, and especially effective for students who may benefit from a consistent role model in their life year over year, as evidenced by the success of multi-year mentorships.

At least one project each year will address a problem in the community. From these experiences, students will learn that the skills they are developing can be applied right now and that they can have a discernible impact in their community. As children begin to understand that they can be agents of change, intrinsic motivation, curiosity, and enthusiasm naturally follow.

In an IQ-PBL model, students learn to advocate for themselves and their ideas, to cooperate and communicate clearly and effectively, and to problem solve. They will be invited to apply these skills beyond their projects to contribute to developing and articulating learning goals and to fostering peace, justice, and equity in the school environment and governance decisions.

Learning will take place outside the classroom as much as inside; moving, exploring the natural world and interacting with the community. Likewise, frequent invitations will be offered for the community to participate in school activities, project presentations, and eventually health and wellbeing-related education. Located in a racially and socioeconomically diverse area near parks and public gardens, with a focus on wellbeing, Arbor Community School will have the opportunity to improve access to green space and time spent outdoors and reduce achievement gaps. ACS can serve as an exemplar for wellbeing in the community.

In the end, the goal of education is to prepare our children for the world that they will inherit. Their world is multi-cultural, multi-lingual, and global; their access to information, immediate and limitless. A modern education will teach children to harness these opportunities, but also how to participate in them responsibly and sensitively. This will require exceptional social intelligence, independent thinking, creativity, and innovation.

1.00 SCHOOL DESIGN**1.01 Provide the name of the proposed charter school:**

Arbor Community School

1.02 Provide the name(s), address(s), telephone number(s), and email address(s) of the organization or individuals submitting the application to create a charter school:

Melissa Rosenkranz
melissarosenkranz@gmail.com
1854 Jenifer St.
Madison, WI 53704
608.213.6906

Lynn Munsinger Brown
lmunsing@gmail.com
5208 McKenna Road
Monona, WI 53716
608.556.9682

Allie Stone
alliestone936@gmail.com
W4929 Bradley Road
Rio, WI 53960
608.444.0816

1.03 Identify how the school will operate as a legal entity under Wisconsin law:

The school will be an independent public charter school, authorized by the UW System Office of Educational Opportunity. This falls under the 2x charter school law as per §118.40(2x), Wis. Stats. As such, a contract to operate Arbor Community School will include all of the provisions under §118.40 (1m)(b) 1 to 14 Wis. Stats., and specify the establishment of the school on the liability of the University of Wisconsin System, including all the terms under which the school will operate and be held accountable. Arbor Community School, Inc. shall remain a non-stock corporation in good standing under Wisconsin law for the duration of the charter.

1.04 Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class:

Arbor Community School will be a K-8 school open to all students in the greater Madison area. A lottery will be held annually for available slots based on enrollment projections. Recruitment efforts will focus on achieving economic and racial diversity.

By year 6, we aim to serve 90-100 students, grades K through 8. Our aim is to enroll a fairly even number of students from each age range, so if necessary, lotteries will be held at each of the grade range sections described in the table below.

Year	Grades Served	Students per classroom	Total Students	Teachers*	Student: Teacher Ratio
1	K-3	2 classrooms K-3: 20 students each (10 students each in K-3**)	40	2	20:1
2	K-4	2 classrooms K-2: 15 students each, 1 classroom 3-4: 20 students	50	3	K-2: 15:1, 3-4: 20:1
3	K-5	2 classrooms K-3: 20 students each, 1 classroom 4-5: 20 students	60	3	K-5: 20:1
4	K-6	2 classrooms K-2: 15 students each, 1 classroom 3-4: 20 students, 1 classroom 5-6: 20 students	70	4	K-2: 15:1, 3-6: 20:1
5	K-7	2 classrooms K-3: 20 students each, 1 classroom 4-5: 20 students, 1 classroom 6-7: 20 students	80	4	K-7: 20:1
6***	K-8	2 classrooms K-2: 15 students each, 2 classroom 3-6: 20 students each, 1 classroom 7-8: 20 students	90	5	K-2: 15:1, 3-8: 20:1

* Additional staff may be employed for educational assistance, community engagement and administrative support as necessary.

** Ideally 10 students enrolled per grade level. Increasing a grade each year to accommodate previous year's oldest students, and enrolling 10 new Kindergartners each year.

*** Additional year shown to indicate school's complete growth pattern.

1.05 State the mission and vision of the school:

Mission:

The mission of Arbor Community School is to build an enduring foundation of wellbeing for all learners through education of the mind, brain, and body, in preparation to become citizens of a global future and a changing world.

Vision:

Through an education that develops a strong foundation of wellbeing, resilience, equity, and curiosity, Arbor Community School will prepare children of all backgrounds to be engaged, resilient, and successful participants in our rapidly changing world.

1.06 State the core beliefs of the school:

Much like an arbor provides plants a strong support on which to grow, Arbor Community School supports students, families, and educators through four pillars of strength:

Community A strong sense of community will be fostered, both within and beyond the boundaries of school. Learning will take place outside the classroom as much as inside; moving, exploring the natural world and interacting with the community. Likewise, frequent invitations will be offered for the community to participate in school activities and project presentations.

Wellbeing Purpose and meaning, self-efficacy, critical thinking, social connections, resilience and mindfulness will build strong mental wellbeing, while physical activity, nutrition and time spent outside will build strong physical wellbeing.

Nature Maximizing the amount of time students learn and play outdoors improves concentration, mental and physical wellbeing, and builds a lifelong connection with the natural world.



Equity The individualized approach inherent in the IQ-PBL model can more flexibly adapt to the needs and strengths of the student, and in so doing increases equity in education. ACS has a strong commitment to cultural, racial and economic diversity, where students will learn to appreciate the similarities and unique challenges faced by members of their community through the lens of social justice. This approach to education has been shown to increase engagement in students of color, and those that traditionally face bigger barriers to the natural world and wellbeing-related education will especially benefit.

These 4 pillars support students, families, and educators, and are developed in the context of a student-led, inquiry-based educational environment. The focus of learning will be centered around so-called “21st century” skill sets first and traditional academic skill sets second. Teachers will act as facilitators and supports to learners. Students will learn to set and reach goals to promote lifelong learning and management.

1.07 Explain how the mission, vision, and core beliefs are grounded in research or best practices:

Decades of research examining the components of psychological wellbeing have converged on the following dimensions: (1) **positive relations with others**, (2) **autonomy** (self-determining and independent; confident in one’s abilities), (3) **environmental mastery** (able to manage a complex array of activities and make effective use of opportunities; able to choose or create contexts suitable to personal needs and values), (4) **purpose in life** (a sense of directedness; feeling that there is meaning in present and past activities and pursuits), (5)

personal growth (a sense of continuous development and realizing one's potential; changing in ways that reflect more self-knowledge and effectiveness), (6) **self-acceptance**, and (7) **resilience** (Mayordomo, Viguer, Sales, Satorres, & Meléndez, 2016; Ryan & Deci, 2001; C.D. Ryff, 1989; Carol D. Ryff, 2014).

Similarly, the factors that contribute to overall physical wellbeing are well established. These factors include healthy diet, exercise, sufficient sleep, clean water, access to medical care, and safe and clean living and working environments (Banspach et al., 2016; Dashti, Scheer, Jacques, Lamon-Fava, & Ordovas, 2015; Hale et al., 2015; Reis et al., 2016). Importantly, psychological and physical wellbeing are intimately related, such that high psychological wellbeing (as defined above) is protective for and can buffer challenges to physical health and vice versa (Kim, Kubzansky, Soo, & Boehm, 2016; C.D. Ryff et al., 2006). Unfortunately, psychological and physical wellbeing can also synergize in negative ways (Kiecolt-Glaser, Derry, & Fagundes, 2015). For example, a lack of positive relations with others (i.e. loneliness) confers as large a risk for all-cause mortality as cigarette smoking (Cacioppo, Cacioppo, Capitanio, & Cole, 2015; Hawkey & Cacioppo, 2003) and lack of self-efficacy predicts decreased longevity (Penzel, Persich, Boyd, & Robinson, 2016). This association is particularly striking in relation to chronic, endemic stressors, such as poverty and racism (for review, see Rubin, 2015).

The ability to contribute meaningfully is predicated, to an extent, on psychological and physical wellbeing. This ability also depends on how well the skill set of the individual matches the current demands of society. To this end, leaders in business, education, and public policy communities came together to identify the skills that are essential for success in the current and emerging environment. This skill set includes creativity and innovation, critical thinking and problem solving, planning and organization, communication and collaboration, and information and media literacy, in addition to core content (reading, writing, math, science, history, civics, etc.). The development of personal qualities is also emphasized, which include flexibility, adaptability, resilience, and self-efficacy, the ability to take initiative and self-direct, emotional and cultural intelligence, and a sense of responsibility and leadership. (For more information see (Bell, 2010; National Research Council, 2013) and Partnership for 21st Century Learning: <http://www.p21.org/about-us/p21-framework>).

To what extent do our current educational models and structures promote the conditions that lead to meaningful contribution and high psychological and physical wellbeing? The answer to this question is complicated, and at best, it is clear that there is wide variation across schools, districts, and states. What we can say definitively is that the current structure and model of public education is not optimal for achieving these goals (see National Research Council, 2013).

On the other hand, there are educational models that intentionally cultivate these conditions and, in doing so, lead to high levels of self-efficacy or one's confidence in their ability to impact the circumstances of their life (Kaldi, Filippatou, & Govaris, 2011). These

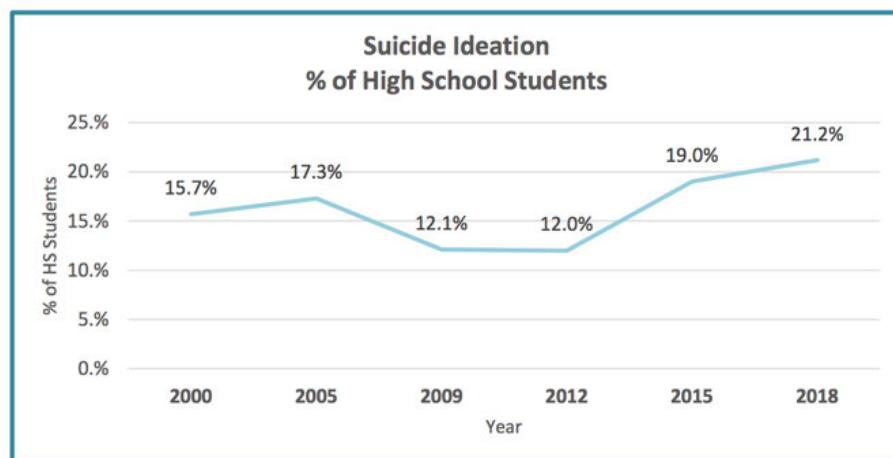
models generally fall within the category of inquiry-based, project-based, and student-centered methodologies that include project-based learning, problem-focused learning, experiential learning, and expeditionary learning models. Because these models incorporate the interests and passions of students to guide content **in the pursuit of core proficiency**, they foster imagination and creativity, self-reflection and cultivation of meaning and purpose, self-initiation and direction. These models rely on projects and problems with real-world applications as the vehicle for learning. Because the outcomes of these projects have real value and meaning, learning becomes a primary reward with intrinsic value, rather than a task to be accomplished in exchange for a grade or token. Projects are completed in groups, building collaboration and emotional intelligence. By nature of the “project” or “problem” focus, they also incorporate planning and organization skills. When a project does not go as planned, problem-solving, creativity and flexibility are necessary. Ultimately, some projects will fail, providing opportunities for critical thinking and resilience building. These skills provide the experience and tools that allow students to act on their self-efficacy (for review see Bell, 2010; Thomas, 2000). This **well-equipped** self-efficacy provides the basis for achieving the components of high psychological wellbeing and making meaningful contributions in the modern world. It will also serve to protect against the depression, anxiety and apathy that have become endemic in young adults (Bandura, 1993; Komarraju & Nadler, 2013; Newman, Dantzler, & Coleman, 2015; Nie, Lau, & Liao, 2011; Wurdinger & Rudolph, 2009; Zuffianò et al., 2013). This is in contrast to the traditional model of education, which provides the content without the opportunity to apply it in meaningful and impactful ways on a daily basis (Blumenfeld, Hamilton, Bossert, Wessels, & Meece, 1983).

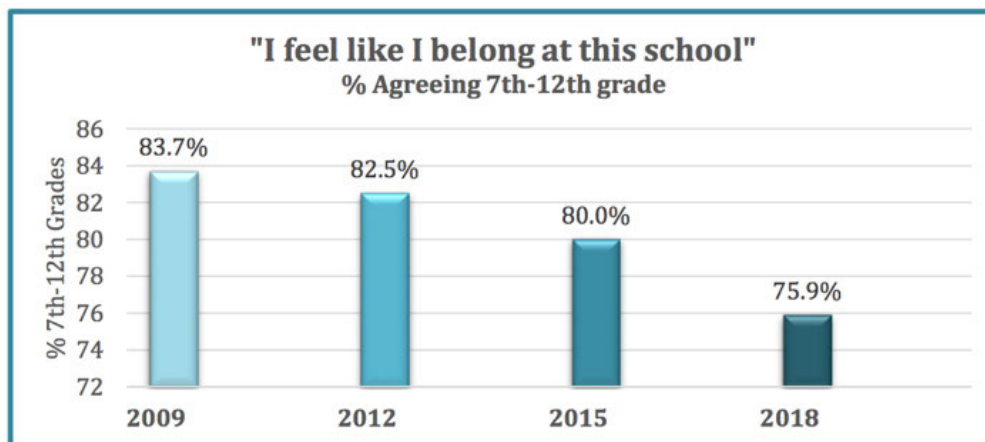
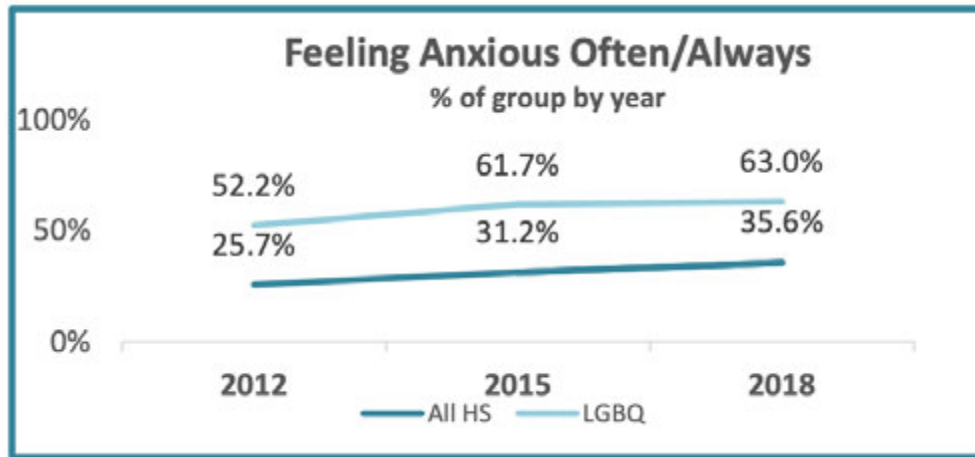
While inquiry- and problem-based methods do not necessarily promote physical health directly, they do directly entrain habits that promote physical health, such as self-regulation, self-efficacy, critical thinking, and resilience (Galla & Duckworth, 2015). For example, these habits of mind are important for maintaining a healthy diet and exercise routine and for avoiding abuse of drugs and alcohol. Further, these models of education can incorporate content related to physical health in a much more comprehensive and experiential way than current models, which has been shown to lead to increased translation of this knowledge into student’s health-related choices (Dudley, Cotton, & Peralta, 2015). For example, at Arbor Community School, a food-based curriculum could be incorporated in which students plan, grow, and harvest food, and then plan, prepare, and share meals using that food. This one example incorporates healthy eating, movement, planning and organizing, problem solving, and relationship building. Finally, psychological wellbeing and ability to contribute meaningfully have well documented impacts on physical wellbeing (Kemp & Quintana, 2013; Patton et al., 2016; Steptoe, Deaton, & Stone, 2015), and in these ways, problem, project, and inquiry-based models of education foster the conditions for all 3 domains of success. Moreover, students educated in this way often improve in conventional metrics of academic success (grades, standardized test scores), as

well (Bell, 2010; Geier et al., 2008; Komarraju & Nadler, 2013; Newman et al., 2015; Zuffianò et al., 2013).

1.08 Note the unique aspects of the school and explain why the community needs this school:

As a community we are not doing enough to support the wellbeing of our children. According to the 2018 Dane County Youth Assessment, more than 20% of 7-12 graders have suicidal thoughts, more than 25% feel that they don't belong, and more than 35% report frequent and persistent anxiety. Further these indicators of poor wellbeing have been increasing over the past decade (see below; figures from the Dane County Youth Assessment and can be found at https://www.danecountyhumanservices.org/yth/dox/asmt_survey/2018/2018_exec_sum.pdf).





This does not have to be the case. According to UW-Madison's Center for Healthy Minds, well-being "is not a static thing – but a set of skills that can be learned and cultivated over time, just like learning to play a musical instrument or riding a bike." If we can cultivate well-being in our children, we believe that they will cultivate well-being in our world. We also know what the factors are that contribute to high wellbeing. In addition to those outlined above (see section 1.07), the Center for Healthy Minds has delineated four areas that have been shown to contribute to well-being:

- 1) Awareness-being fully connected to our present experience or being in the present moment
- 2) Connection-being able to feel connected with others, empathize, behave compassionately and express gratitude

- 3) Insight-having a deep understanding of how our thoughts and emotions work and the belief that we can grow and adapt to meet life's challenges
- 4) Purpose-finding what motivates, inspires, and drives us in life

Most schools struggle to cultivate these aspects of well-being in their students and even have structures--such as rote assignments and grading/tracking systems--that discourage these qualities. That's where Arbor Community School comes in.

We believe that this is what the future of education could look like. We are interested in being part of the national movement toward identifying new models in education that will give students the skill sets and real-world knowledge needed for their overall wellbeing and success in a rapidly changing world. This school would offer the opportunity to:

- Innovate. This school would have the agility to serve as an "incubator," where staff members are empowered and have the flexibility to implement innovative, research-based methods. The best of these practices could then be more easily transferred to existing schools.

Across the country, the concept of starting separate, autonomous schools devoted to innovation is sometimes referred to as an Innovation Zone. Successful businesses and organizations invest in innovation sectors - why not education? Think about when the Dayton Hudson Company launched Target. It was an opportunity to build something completely and fundamentally different from the ground up, which then served more people and brought huge success for the company. Innovative models might not be the right fit for everyone, yet they have potential to benefit everyone in the community over time.

Importantly, successful public charter schools with innovative designs happily coexist with traditional district schools all over Wisconsin. Superintendents throughout the state have embraced the opportunity to offer students in their districts opportunities for alternatives to the traditional education model with great success. Madison is unusual in this regard, with very few public options outside of the traditional approach. In fact, at the elementary level, Nuestro Mundo is the only alternative available and only innovates in its integration of Spanish language into the curriculum (it is a Spanish-immersion school).

- Apply research-based practices. Studies show that the tenets of the proposed school promote greater intellectual, physical, social and emotional development. Research indicates these methods also encourage student engagement, focus, creativity, citizenship and health, which has a direct impact on the overall wellbeing

of the community.

- Offer alternatives and serve the interests of the community. Opening a new Innovation Zone school gives families more options to find the best educational fit for their child(ren) in the Madison area, without the cost of private school and without burdening school districts with the challenges of spending political capital to launch a start-up. In the early years of this school's development, Monona Grove School District surveyed families of elementary school children in the district and more than 100 families stated that they are "definitely interested" in having their child(ren) attend a school based on these principles. Though this is not our target area of recruitment, it does demonstrate the appeal of this educational option for families in the Madison area. Moreover, in the absence of a formal survey, families in the targeted area have been engaged in one-on-one conversations and many have expressed enthusiasm and interest in enrolling their children.

This ability for a charter school to provide a beneficial innovative environment has been articulated by Ed Hughes, retired MMSD board member, who indicated in his blog the benefit that Isthmus Montessori Academy (which was a private school applying to become an MMSD charter school at the time of his writing) would have for the district:

"Converting an existing private school into a district charter school can amount to innovation for the school district, if the new school offers a curricular approach that is currently not offered in the district. Assuming the financial impact is not out of line, the controlling question should be whether students overall are better off with the new option."

<https://edhughesschoolblog.wordpress.com/2017/03/19/fact-checking-school-board-campaign-claims-about-the-isthmus-montessori-academy-charter-school-proposal/>

- Further the UW System mission statement, "...to extend knowledge and its application beyond the boundaries of its campuses, and to serve and stimulate society by developing in students heightened intellectual, cultural, and humane sensitivities...and a sense of purpose"

A true PBL elementary school does not exist in Madison, nor does an elementary school focused on wellbeing. When researching the model for this school, we visited schools in Monona, Amherst, Milwaukee, and Lodi. This school has the potential to bring an innovative education model to Madison and improve educational outcomes for traditionally underserved children.

Indeed, members of the community took it upon themselves to articulate the need for a school like this in the community, through letters to the editor written when, early on, we considered authorization through the Monona Grove School District:

"...Although many children can survive and thrive in traditional public school settings, the optimal learning environment will naturally vary from child to child. The environment that is most successful for the largest number of children will nevertheless fail to serve the unique needs of some individuals. Similarly, different families may have different priorities and values that they wish to see emphasized in their children's education. This diversity is of great importance and should be valued rather than homogenized, and providing support and opportunities for this diversity is one of the most pressing issues for 21st century public schools to address.

...I cannot speak from any personal experience, but by all metrics we are blessed to have tremendous public schools in Monona and Cottage Grove. We cannot afford to rest on our laurels and assume that what has worked in the past will continue to serve all of our learners in the future. I am proud to support the opportunity before us to explore a progressive and forward-thinking model for elementary education, and I hope that other community members and our School Board also recognize the value that this opportunity holds."

- Dan Grupe, Monona, Wisconsin

"This summer, a group of Monona Grove teachers, administrators, parents and community experts have been meeting to put together a proposal for a public charter school in Monona Grove...Although we are not directly involved in the planning, as Monona residents with two young children, we support this effort for several reasons.

First, we believe in the power of choice, not only for parents looking for a different educational model to match their child's needs, but also the direct benefactors – the children themselves. The planning group is exploring the possibility of a school that uses project-based learning. In this case, children will be empowered to learn in the way they learn best and to explore what interests them. I believe this approach would help children maintain a bright outlook and a lifelong love of learning, which allows them to find their passion and compatible employment.

Secondly, it appears that this additional schooling option would serve all members of the Monona Grove community as a whole by integrating with important community members such as seniors, farmers, environmental conservationists and other sources of educational opportunity. This would benefit the proposed charter school of course, but other district schools will also benefit from these partnerships. The school could even create additional opportunities for community partners looking for new avenues to expand their reach.

It seems we are at a crossroads of needing to address a growing number of school age children in the district. The investment into the proposed charter school has potential to inform future change in schools across the district. Successful practices in the charter school could be integrated into our other schools – it's complementary, not contradictory."

-Dana Goodman, Monona, Wisconsin

1.09 Describe how the mission and core beliefs will drive decision-making during the development and operation of the school:

At all levels, this school will embody intentional decision-making, wellbeing of all participants, and address its role as a member of the local and global community. The school will be a teacher led "leading by being" community of practice, in which teachers will meet daily to drive decision-making at micro and macro level and serve as role models for the habits of mind that they are instilling in students. At the micro level, teachers will cooperate to make decisions around student learning, data, assessment, physical space, purchasing, and procedures. At the macro level, teachers will collaborate with the governance board to inform policies, major budget decisions, and set the vision and scope of the school.

Additionally, the larger community of parents and stakeholders will be an integral part to this intentional learning community, playing a role as inspiration, guidance, sustainable partnerships, volunteers, and community experts.

Where practical, teachers and/or governance board members may rate decisions using a scoring rubric to determine the impact a decision might have on the four pillars. For example:

Pillar	Little or Negative Impact	Some Impact	High Degree of Impact
Equity	<p>Insensitive to or may discourage cultural, racial, and economic diversity.</p> <p>Creates barriers to educational equity and/or wellbeing in</p>	<p>May show appreciation for cultural, racial, and economic diversity.</p> <p>May remove some barriers to educational equity</p>	<p>Embodies authentic commitment to cultural, racial, and economic diversity.</p> <p>Quantifiably removes barriers to educational equity</p>

	underserved children	and/or wellbeing in underserved children	and/or wellbeing in underserved children
Nature	<p>Decreases or de-emphasizes amount of time students learn and play outdoors.</p> <p>Reduces or discourages connection to the natural world.</p>	<p>May enable students to spend time learning and playing outdoors.</p> <p>May provide a connection to the natural world for some students or community members.</p>	<p>Maximizes amount of time students learn and play outdoors.</p> <p>Builds an enduring connection with the natural world.</p>
Wellbeing	<p>Does not allow for increased awareness of purpose.</p> <p>Discourages critical thinking.</p> <p>Does not build resilience.</p> <p>Enables or promotes distraction, mind-wandering, or avoidant behavior .</p> <p>Discourages or does not encourage healthy eating.</p> <p>Reduces or does not enable physical activity.</p>	<p>May provide meaning for students.</p> <p>Allows for critical thinking.</p> <p>May build resilience.</p> <p>Encourages mindfulness.</p> <p>May encourage some to eat healthfully.</p> <p>Impels some to participate in physical activity.</p>	<p>Increases purpose and meaning.</p> <p>Empowers students to think critically.</p> <p>Builds resilience.</p> <p>Epitomizes mindfulness.</p> <p>Enables healthy eating.</p> <p>Boosts physical activity.</p>

Community	Isolates or does not involve the school in the community.	Enables student, parent, and educator involvement in the community.	Significantly increases community collaboration.
	Does not benefit families or the community.	May indirectly support some families and/or some community members.	Strengthens families and community.

1.10 Characterize the school culture desired for the school and how this culture will be established:

The school will be a democratic culture, in which students have developmentally appropriate agency and voice in all aspects of the school community. This practice is based on Michael Apple's democratic schools research (Beane & Apple, 1995). Some examples of how this would play out in a young elementary setting include choice over activity, guided development of community norms and student contracts, roles in leading discussions in whole-school and small group circles, agency in times they eat and use the restroom, and freedom to play throughout the day. Progressively older students will have these liberties as well as added agency over community involvement, use of physical space, and serve as assistants in monitoring and teaching the younger students.

This culture is notably different than many traditional schools, and hence will require deliberate teaching, especially to students who have already attended traditional schools. Apple found that a true democratic school extends the practices to the families and community it serves, so we will include parents and community members on the governance board and provide ample opportunities for families and community members to not only visit the classroom, but contribute in ways they and the school find meaningful.

Staff will provide professional development to parents and community members on democratic practices so that the culture of school can extend into homes and neighborhoods. In school teachers will speak openly to students about the purpose and practices of a democratic school in order to cultivate this learning community.

Initial practices to teach a democratic classroom include "circling up" multiple times a day as a whole group, asking students how to solve problems instead of the adult solving them

for the student, and having the students create community norms as an early classroom activity.

For students to participate effectively in a democratic classroom, they must understand their own thought processes and appreciate the thought processes of others. To further bolster the goals of openness and metacognition, the school culture will reflect a commitment to the 16 "Habits of Mind". Teachers and students will foster an environment where exploring meanings, extending values, and increasing alertness are valued developmental dimensions of education.

1.11 Describe the process that will be used to develop an initial strategic plan:

In order to develop and sustain the mission of the school: "to build an enduring foundation of wellbeing for all learners through education of the mind, brain, and body, in preparation to become citizens of a global future and a changing world" we will cultivate a community of supporters who believe in this framework. The governance board's development of a strategic plan is underway, , in collaboration with the planning group, and with input from partnerships and other stakeholders. We have already accomplished several important goals (see below). The strategic plan will be divided into 3 phases: Emerging, maturing, and excelling.

<u>Phase</u>	<u>Activities</u>	<u>Goals</u>
Emerging (1-2 years)	Apply for DPI planning and implementation grant	Fund planning year activities, start-up costs, and professional development for first 4 years. This goal has been met. We received a grant for the entire amount requested.
	Identify initial and sustainable funding streams	Identify 3 funding sources in addition to DPI grant with potential for renewal, including foundations that support well-being, equity in education, educational innovation, urban schools, environmental education
	Secure a facility for the school	Locate a well-suited space for

		the school. This goal has been met.
	Contract with partners for programming	Partner with naturalists, nutritionists, and mindfulness and fitness experts to develop curriculum
	Hire staff	2 lead teachers, 1 specialist, 1 part-time support staff, Position vacancy listings have been posted
	Formalize community partnerships	Minimum of 2 critical partners in addition to programming partners. Likely community centers, local non-profits, and small businesses. This goal is underway
	Develop marketing and recruitment strategy	Ensure access and equity This goal has been met
	Provide framework for school culture	Develop norms that support teacher leadership and healthy habits of mind
	Implement surveys and facilitate focus groups with key constituent groups, including teachers, parents, and students.	Understand student, family, community needs and expectations. This goal is underway.
Maturing (2-5 years)	Implement Hope survey and other measures of wellbeing	Ensure steady, intentional progress toward student, staff, parent wellbeing.
	Increase community partnership utilization, deepen relationships	Garner greater internal and external support for the school vision. Shape the vision in collaboration with the

		community.
Excelling (5+ years)	Provide opportunities for sharing best practices with other school communities	Broaden reach of innovative education methods.
	Provide greater variety of services, such as the inclusion of an on-site medical clinic or counseling services.	Develop into full-service community school

2.00 GOVERNANCE AND LEADERSHIP

2.01 Identify the organization and individuals involved in the development of the school:

Arbor Community School, Inc. is a Wisconsin non-stock organization.

The primary individuals involved in the development of the school are Melissa Rosenkranz and Lynn Munsinger Brown.

2.02 Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization:

Melissa Rosenkranz is a research scientist at the UW - Madison Center for Healthy Minds. She has a Ph.D. in psychology and her career is focused on the neural basis of wellbeing. Melissa brings expertise in mental flourishing and psychology to the team. Melissa also has extensive grant writing experience and a track-record of success in garnering both public and private funding.

Lynn Munsinger Brown is Product Management Director at Oracle Corporation in Silicon Valley, where she has spent her career innovating in the field of enterprise software and leading change - bringing people, ideas and resources together to drive innovation. Lynn has 2 children; one attending Isthmus Montessori Academy, and one attending Woodland

Montessori School, where she also serves as governing board president. Lynn has considerable experience garnering support for innovative ideas in the communities of Monona, Cottage Grove, and Madison's East side.

Allie Stone is one of the co-founders of a public charter School, Ouisconsin School of Collaboration, in Lodi. She is in her 12th year of teaching and has always had a passion for creating innovative ways for students to take charge of their learning. She believes there is not a "one size fits all" way of teaching and learning. Allie has 4 children ages 6 and under that teach her new things daily. Allie and her husband enjoy spending time with their children on their farmette just outside of DeForest.

2.03 Describe the board that will be created to lead the school:

The governance board will consist of not less than five nor more than nine voting members with expertise that supports the vision of the school, including members from the private and public sectors both within and outside of the field of education. Parent and community directors shall serve 2 year terms, staff representatives serve 1 year, and there is a two-term limit to the number of terms any director may serve. Officers include President, Vice-president, Secretary, and Treasurer and shall be elected by the board each year.

The founding governance board consists of the following:

Melissa Rosenkranz, President

Melissa Rosenkranz is a member of the board of directors and serves as President. She is cofounder of the school, having developed the model and co-authored this application for authorization, as well as the DPI grant application. Her qualifications include her perspective as a parent of school-aged children and her professional expertise as a neuroscientist at the Center for Healthy Minds, where she studies interventions that promote wellbeing, and the neural-immune and biochemical mechanisms by which individual differences in response to emotion alter resilience to and the progression of disease.

Dadit Hidayat, Vice President

Dadit Hidayat is a member of the board of directors and serves as Vice President. He is a community development specialist, having led community-based research and community organizing initiatives focused on promoting an equitable and sustainable community. His most essential strengths are in strategic planning, program development and evaluation, and resource mobilization. Most of his collaboration is with community-based organizations including nonprofits. His community engagement has allowed him to collaborate with members of resource-deficient communities. His goal in serving on the

governance board is to see ACS as a group that will mobilize relevant community members in creating positive learning opportunities for our young children.

Rhoda McKinney, Secretary

Rhoda McKinney is a member of the board of directors and serves as Secretary. Her qualifications include her perspective as a parent of school aged children and her work in Recruitment and Community Outreach at Madison College. She has a demonstrated history of working in the higher education industry and is skilled in nonprofit organizations, event planning, customer service and volunteer management.

Bryn Orum, Treasurer

Bryn Orum is a member of the board of directors and serves as Treasurer. She is an Outreach Specialist at UW-Madison's Educational Outreach & Partnerships where she coordinates Greater Madison Writing Project programs for youth and educators. Previous to work with Arbor Community School, Bryn co-founded and taught high school English at Clark Street Community School in Middleton (a public PBL charter school). Bryn studied Literacy and English at UW-Madison where she earned her BA and MS. Always excited to see educational innovation at work for equity, Bryn believes in the mission of Arbor Community School and is honored to be a part of the school's Governance Board.

Wanda Smith, Director

Wanda Smith is a member of the board of directors. She is founder and president of Peace Network, a mental health consulting service where we equip men, women and children to live through these emotionally challenging times through one-on-one group workshops and seminars. She is a longtime community organizer in Fitchburg, Wisconsin. She has experience in human services including mental health counseling, Alzheimer and Dementia patient care, domestic abuse intervention advocacy, and psychotherapy, and is a fierce advocate for underserved communities, especially communities of color.

Venus Washington, Director

Venus Washington is a member of the board of directors. Her qualifications include her perspective as a parent of school age children, and her commitment to health and wellbeing in the community. She holds a degree in sociology and social welfare and works as a personal trainer and wellbeing coach to inspire individuals, families and communities to achieve total health and wellness. She provides personal training assistance, adult fitness classes with dance and cardio, and body strengthening exercises. Ms. Washington provides free family fitness classes sponsored by Madison public libraries, and provides conditioning training with Madison Elite track club, whose vision is to bring communities together through track and field.

Committees have been formed to advance the mission. The committees will be staffed by volunteers from the school community and chaired by a member of the board, including the following standing committees:

Diversity and Equity Committee Increases equity in the school and seeks to engage a diverse population of students, families, and teachers and to build a community that shares and respects differences of race, ethnicity, gender, sexual orientation, gender identity, age, abilities, culture, socioeconomic level, family structure, and language and learning style.

Finance Committee Ensures adequate resources, creates budget, monitors implementation of the approved budget and recommends policies for financial management.

Curriculum & Instruction Committee Ensures academic success of the school and adherence to the pillars through recruiting, hiring, and retaining top talent, and overseeing the development, delivery, and outcomes of the curriculum.

Outreach Committee This committee, consisting of community members inspired by the school model, act as ambassadors and advocates of the school in the communities in which they are already working or in which they have extensive connections in order to foster community partnerships and give voice to those communities.

2.04 Describe the process to be used for the selection of board members:

Board members were and will continue to be selected based upon traditional leadership characteristics such as strong facilitation and communication skills, but also on the following criteria:

- Expertise in some facet of the ACS mission
- Dedication to diversity and social justice
- Creative and flexible thinking
- Comfort with uncertainty
- Resilience and grit
- Engagement with the community

2.05 State the general duties of board members:

Board members' primary role is to support the mission of Arbor Community School. To support the mission, the governance board will:

- Promote diversity and equitable access
- Establish policies for the conduct of business by the school
- Establish policies to ensure health and safety of students and teachers
- Ensure equity of admissions policies and employment practices
- Monitor enrollment and course completion
- Hire personnel
- Ensure compliance with charter contract and school policies
- Plan for long term sustainability of the school
- Approve an annual budget
- Conduct annual audits of the financial and programmatic operations of the school
- Ensure adherence to academic and operational performance standards
- Supervise and oversee evaluation of lead teacher(s)
- Monitor the climate and culture of the school
- Establish procedures to facilitate communication between and among staff, parents, and students, including procedures to proactively and equitably allow for parents to raise issues and ensuring family-teacher conferences are held at least once annually.
- Take corrective measures if ACS fails to meet performance standards
- Complete ACS board orientation training and any training required by the OEO director
- Establish policies and procedures to advance the vision of Arbor Community School

2.06 Explain how the governance of the school will embody principles of democratic management, including but not limited to parental involvement (118.40(1m)(b)6):

The governance board will include parent(s) or guardian(s) of Arbor Community School students, as well as educators and community members. The governance board will strive to maintain a diverse and non-discriminatory board that represents the whole of the greater Madison community, and as per state statute, no more than a minority of the governing board's members may be employees of the charter school [§118.40(4)(ag), Wis. Stats.]. Board membership shall require attendance at all but 2 monthly board meetings, but shall NOT require financial contribution to the school or its campaigns. Additionally, volunteer committees chaired by governance board members will be formed to support school goals including diversity and equity, curriculum & instruction, finance, and community outreach (see descriptions above). Starting in 2019-2020, these committees will

also be staffed with family and community volunteers, providing parents direct involvement in operations of the school.

Further, board policies shall include measures to ensure transparency and increase community and parent involvement, including but not limited to the following open meetings standards:

Annual meeting: An annual meeting will be held for the purpose of informing staff and parents of issues of concern, soliciting input, and to nominate and elect board members.

Notice: Notice of any meeting shall be given by electronic means to each member no fewer than 5 days before such meeting and a written announcement of the time, place, and purposes of such meeting shall be posted prominently and distributed to the school community as necessary.

Transparency: Regular board meetings shall be open to the public, and the bylaws shall set aside time for community members to ask questions or raise concerns. Minutes will be taken at all regular board meetings.

Values: Student, staff, and parent voices and values shall inform the governance board's decisions.

2.07 Explain how the board will establish policy and work with the staff to promote the goals of the program:

The governance board will work with staff to establish policies that marry the instructional program with the pillars of the school:

Community Increase student, parent, and educator collaboration to improve student learning, stronger families and healthier communities.

Wellbeing Guide the adoption of wellbeing indicators as complementary measures of academic goals.

Nature Cultivate a sense of place and promote policies that build a lifelong connection with the natural world.

Equity Ensure collaboration within and relevance to a diverse and inclusive community.

For example, the board will develop a policy for school attendance and truancy. In doing so, the board will work with teachers to consider the ways in which the policy will deal with matters of truancy that ensure equity and increase collaboration between the family, student, and teachers. The policy may include provisions for not just notifying families of their violation of truancy policy, but meeting personally with the family, as many times as necessary, to understand circumstances that prevent the student from attending school. Perhaps the child's parents have opted to keep the child at home one day a week because the child feels overwhelmed by the classroom environment, perhaps the child's parents do not understand the value of the child's contribution to the classroom, or perhaps the child is providing care to a family member during school hours. Any of these cases might be handled through open communication that appreciates differences and by using creative solutions to resolve the underlying issue for truancy - resulting in an increased level of trust between the family and school, and an increased level of attendance for the child. In this way board policy will directly promote the pillars and values of Arbor Community School.

2.08 Attach a copy of the by-laws of the board (if available).

See attached.

2.09 Attach a copy of articles of incorporation as defined by Wisconsin law.

See attached.

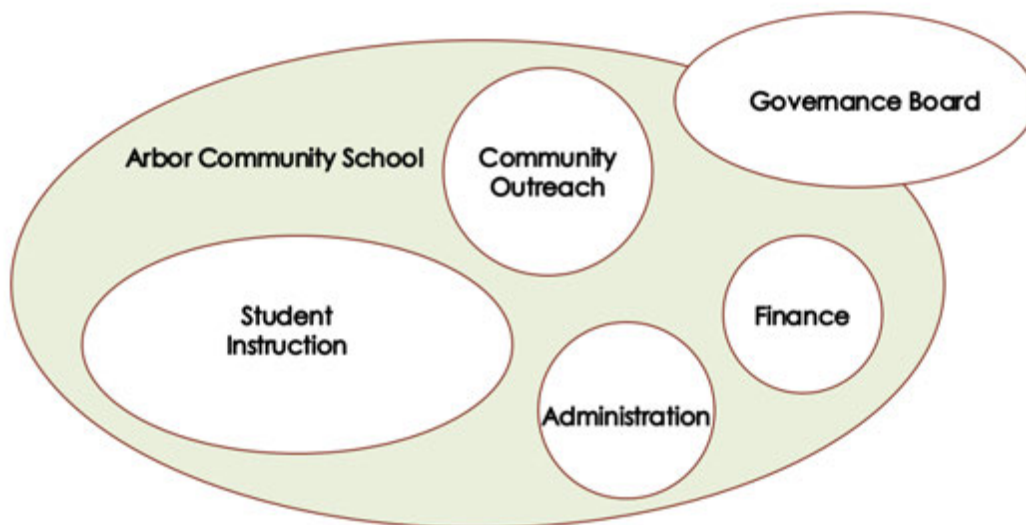
2.10 List the names and occupations of individuals who will serve on the initial school board (if available).

Dadit Hidayat, Community Development Specialist
Rhoda McKinney, Recruitment & Community Outreach Technician
Bryn Orum, Outreach Specialist
Melissa Rosenkranz, Neuroscientist
Wanda Smith, Mental Health Specialist
Venus Washington, Wellbeing and fitness coach

2.11 Explain how the school will operate in terms of lines of authority and responsibility. Please attach an organization chart.

The school will operate using a holacratic organizational structure. Holacracy is an innovative method of organizing that enables decentralized decision making. It is based on the assertion that if people are given authentic ownership in a role, they will be highly engaged and will find innovative ways to complete the work required of that role. In lieu of a hierarchical system of responsibility, holacracy utilizes a framework of rules, formed by a number of organizational “circles”. Each circle has the authority to organize itself to achieve its goals. Goals may be formed strategically by the governance board, or set by the circle team, but they are all ultimately part of and responsible for the success of the organization as a whole.

Authority is delegated so that each person in the organization is given autonomy to complete their role(s), initiating collaboration with others as they see fit. Static job descriptions are replaced by dynamic role descriptions that are a result of the team doing the work and determining what is needed. For example, at Arbor Community School, not any one person will be responsible for community outreach. Whomever feels most comfortable meeting one-on-one with new families will accept that role in the community outreach circle, and whomever is better able to serve the goals of the community outreach circle by posting weekly photos to the parent portal will serve in that role. Entrepreneurial spirit is fostered while expectations are upheld. The organization chart looks like the following, with each circle responsible for the success of the school as an organization:



2.12 Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided (118.40(1m)(b)):

Arbor Community School teachers will identify an administrative lead role to serve as point of contact for school management. The person serving in this role will have all required skills and certifications as required by statute and will be provided regular professional development to maintain high standards in the management of ACS.

The administrative lead role will enlist expertise and competent personnel for administrative functions that are not provided in-house, partnering with CESA 2 to provide services such as accounting, payroll, etc.

2.13 Identify the criteria to be employed in hiring the school director/principal:

N/A

2.14 If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation:

N/A

3.00 COMMUNITY AND FAMILY ENGAGEMENT**3.01 Describe the community the school will serve:**

Arbor Community School will serve a diverse range of students who will thrive in an environment where they have agency and autonomy. It will serve students who want or need to spend more time moving and being outside than the traditional classroom can accommodate. It will serve students who learn best when they can apply what they're learning directly and see its impact. By being located in a densely populated area that is easily accessible by multiple modes of transportation, ACS will be located strategically to draw from several racially and economically diverse neighborhoods.

3.02 Explain how the community has been involved in developing the school:

The founding members of ACS, Lynn Munsinger Brown and Melissa Rosenkranz, are members of the community who embarked on this endeavor in response to a perceived need in the community for options in elementary public education. Over the course of several years in developing the mission and vision, we have consulted with and listened to a wide swath of the community including educators, school board members, social workers, community center directors, naturalists, parents, and mental health experts. The particular model ACS has chosen has been vetted by a team of experts, including 4 education researchers and professors, 2 leaders from the Innovative Schools Network, and 3 leaders from the WCER Network, and the 2 experienced charter school developers, Bryn Orum and Allie Stone, one of whom is a co-author of this document and the other a founding board member.

The development of the model and its translation into practice - the outreach and community partnership plan in particular - has been informed by the governance board who collectively and individually embody the principles of equity, community outreach, and wellbeing that the school aims to uphold.

3.03 Explain how the community will be involved in the operation of the school:

Community schools have always rooted their work in a solid body of research about what it takes to promote student success, including parental involvement in children's education, rich and engaging out-of-school experiences, student wellness and family stability. More recent (2010) and equally rigorous research by Anthony S. Bryk and his colleagues at the Consortium on Chicago School Research added grist to this conceptual mill by identifying the five essential ingredients of school improvement: principal leadership, coherent curriculum, professional capacity-building, student-centered school climate and authentic family and community engagement. This firm theoretical grounding can now be coupled with a strong base of empirical evidence indicating that, in the presence of a "whole child" approach to education, all children can succeed and thrive.

Arbor Community School is designed to develop a culture of belonging and to use community relationships to facilitate learning. This includes community within the classroom, in the school as a whole, among all the families involved and between the school and the greater community. Locating the school in a densely populated area, with easy access to a wide variety of opportunities for nature- and wellbeing-related experiences, provides the perfect conditions for establishing and growing community partnerships. For example, Goodman Community Center (GCC) serves dozens of families every day through its pre-school, after-school, summer school, food pantry, and community events. Though Initial attempts to formally partner with GCC were hamstrung by political influence, a relationship can and will develop organically as a subset of children who attend ACS will also attend after-school programming at GCC. Informal interactions

that occur in this context, in addition to current and ongoing conversations with the GCC about informal relationships will build enduring relationships between the organizations that directly benefit the children and the community.

Family engagement is critical for student success in all schools. At ACS, the intention is for a symbiotic, mutually beneficial relationship between the school and its families. Families will be encouraged to be actively involved various ways, as suits their interests and availability. In addition to including parents on the governance board, parents, relatives, friends, and neighbors will be invited to provide input and support for ACS curriculum initiatives and projects. Parents and family members might also serve as professional partners in education. For example, a statistician could come into the classroom to work with students on math and baseball or a musician could lead a lesson on drumming and its history in different cultures. The school will build community and aspire to become a community hub and a gathering place by hosting educational offerings, discussions, speakers and events.

3.04 Describe community partnerships the school will have or hopes to have:

ACS has been planned by a community. Those partnerships will be maintained and extended as necessary to meet the goals of the school. ACS will foster active, coordinated partnerships dedicated to improving student engagement and achievement, exposure to the natural world, equity, and well-being. Each partnership will establish a common mission and vision, mutually agreed-upon goals and shared decision making.

<u>Partner</u>	<u>Nature of Work</u>
Established partnerships	
Aldo Leopold Nature Center	Nature-based curriculum, instruction, community outreach
Center for Healthy Minds	Professional development, curriculum guidance, research/measurement
Innovative Schools Network	School design consultation, professional development, and school review
Scott Anderson, Mound Street Yoga	Yoga, movement, mind-body connection curriculum
Alicia Wright, Movements for Mind & Body	Yoga, movement curriculum

Nathan Larson (author of Teaching in Nature's Classroom: Core Principles of Garden-Based Education)	Outdoor/School garden programming
WRCCS	Charter School governance board and leadership guidance, and support for serving educationally disadvantaged learners.
Partnerships in development	
Bridge Lakepoint Waunona Neighborhood Center	Recruitment of families, ELL support
EdVisions	PBL resources, evaluation plan, Hope Survey
Madison College early childhood education program	Internship site for Madison College students
MG21 (Monona Grove Liberal Arts Charter School)	Multi-age project collaboration, share best practices, social/emotional projects
UW School of Education	Research partnership
Vitruvian Farms	Sustainable agriculture curriculum
Wisconsin Green Schools Network	Resources for environmental education enablement
Potential partnerships	
Access Community Health Centers	Health services
Bare Knuckle Arts	Arts programming
Community Groundworks	Nature and garden-based programming
FAST (Families and Schools Together)	Family Involvement
FEED Kitchens	Meal program support, food curriculum
Fired Up Pottery	Arts programming
Goodman Community Center	Recruitment of families
Joining Forces for Families	Recruitment of families

Midwest Clay Project	Arts programming
SSM Health Adult Daycare	Intergenerational programming
UW Center for Research on Early Childhood Education (CRECE)	Assessment and professional development
UW Environmental Design Lab	School garden & outdoor space design

3.05 Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built:

Culture is everything at Arbor Community School. Exceptional teachers will be and visionary governance board leaders have been recruited to build and sustain a strong culture of shared purpose, empathy, and trust.

Families will choose Arbor Community School voluntarily, and will be welcomed to informational sessions and community discussions to determine if ACS might be a good fit for their student (see recruitment strategies described below for more details). As part of the enrollment process, families will attend a required meeting in order to fully inform families of the unique aspects and culture of the school, and to understand each family's needs, strengths, and expectations.

The involvement of all stakeholders (educators, parents, students, funders, community members, service providers) will be accomplished through outreach, relationship-building and shared leadership. Through this strong culture of trust, open communication, and an intentionally interconnected school community, the community's commitment to and investment in their education will be palpable to students.. They will understand the purpose for their participation in school which will ignite their natural desire to learn and they become increasingly engaged in their learning.

3.06 Describe how requirements, expectations, and preferences of students, parents, and other stakeholders will be determined:

Arbor Community School will work to involve parents and families at all levels, starting as early as possible through vigorous outreach efforts. Parents are treated as true partners in their children's education. They are encouraged to visit the school often, to learn and socialize, to serve as volunteers or guest speakers, to attend governance board meetings, and to advocate for their children and the school. Frequent communication among and between teachers, parents, and community members keeps everyone informed, motivated

and involved, and provides opportunity to give feedback, address areas of concern, and celebrate successes. The governance board will annually survey families and teachers to assess and monitor family engagement and satisfaction within ACS.

4.00 MARKETING, RECRUITMENT, AND ADMISSIONS

4.01 Describe the marketing program that will be used to inform the community about the school:

To date, our outreach efforts have been extensive and almost exclusively focused on communities of color. We have had one-on-one meetings with many individuals who have reach in these communities, in order to build relationships, trust, and spread the word about ACS. For example, we have met with Will Green of Mentoring Positives, Corinda Rainey Moore of Kids Forward, and Keetra Burnette of United Way. We have been so focused on communities of color, underserved communities of color in particular, in order to achieve our equity goals.

Our strategy for reaching underserved families and families of color is a grassroots strategy that has 3 steps. The first step is described above and involves forming relationships and building trust with known and trusted leaders in these communities. In the coming weeks, 40-50 of these individuals, many of whom we have already formed these relationships with, will be invited to an event to learn more about our mission and vision and have an opportunity to ask questions and raise concerns. (Step 2) These individuals will be asked to serve as ambassadors for ACS through a grassroots effort. They will encourage families in their orbit to attend one of several Open House events that we will hold during March. (Step 3) At these Open Houses, there will be IQ-PBL demonstrations, so that families will have a more tangible idea of how their children will spend their time learning. We will also explain the mission and vision and given families time to ask questions and express concerns. We will also assist families in completing enrollment forms, should they decide to enroll. Our community ambassadors will also help families complete enrollment forms.

These Open House events are not just for families of color or underserved families. They are open to anyone. However, we are aware that already, through word of mouth alone, we could fill most of the available seats with children from white, middle class, educated families. In order to meet our equity goals, we will need to put much more work into recruiting families of different racial and socioeconomic categories.

In addition to the strategies described above, Arbor Community School maintains a website at <http://arborcommunityschool.org> and will implement a more general community awareness plan that will reach greater Madison area residents, organizations, and

businesses through a variety of media outlets that include public postings and social media campaigns.

4.02 Explain how students will be recruited for the program:

The founders have very purposefully designed the school to open with 40 students. While starting the school with higher enrollment would increase impact, it could diminish the ability for teachers, students, and families to connect with and deeply understand one another, at precisely the time when the culture of the school is being formed to support the needs and strengths of those teachers, students, and families. Better to start small, with fewer actors, and create a strong culture and sustainable model that can be replicated if necessary, over time.

Further, given the popularity of the model in even its very earliest form, it is anticipated that there will be more applicants than enrollment spots available. While word-of-mouth/personal recommendations are one of the most influential strategies in recruiting for enrollment across the country (and by many accounts this seems especially true in the Madison area), enrolled families will have a natural tendency to share recommendations with people with whom they share similar characteristics, which could lead to an increasingly homogeneous stream of applicants. Thus, to promote diversity in the school for years to come, great care is being taken to ensure diversity of the community groups to which the school is marketed, so that the application pool reflects the greater Madison population.

Considering this, the recruitment plan for Arbor Community School will be intentional (as described above in 4.01). We will recruit in schools, preschools, and neighborhood community centers with high percentages of students that qualify for free and reduced lunch, and high populations of non-white students, to inform families of the educational opportunity available for their children. We will do so through trusted community members and through community organizations that serve disadvantaged children and their families, as well as those that already serve racially diverse groups. For example, we will use our existing community connections to host information sessions at Bridge Lakepoint Waunona Neighborhood Center, Goodman Community Center, and Warner Park Community Center

ACS will provide families with information on the school's objectives, the inquiry-based educational model, the mission and pillars of the school, the school calendar, and provide opportunities for families to ask questions and gain understanding. Additionally, ACS will survey families to understand factors and values that affect their school decision-making

process, such as a year-round school calendar and after-school care, to address their needs in recruitment efforts.

4.03 Describe the means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the school district population (118.40(1m)(b)9):

Our outreach efforts have been directed almost exclusively at ensuring racial and ethnic diversity among the students who will enroll at ACS. Our strategies to do so are described in the previous 2 sections. Moreover, we have recruited a governance board that is majority racial minorities and are conducting a nationwide search to hire top-notch teachers of color. We will publicize the availability of the school throughout the greater Madison area in multiple languages and we will track diversity of teacher and student populations to ensure continued progress toward diversity goals.

Arbor Community School shall not discriminate in admission or deny participation in any program or activity on the basis of a student's sex, race, religion, national origin, ancestry, creed, socioeconomic status, pregnancy, marital or parental status, sexual orientation, gender identity, language, learning style, or physical, mental, emotional or learning disability.

4.04 Describe admission policies and practices to be used to enroll students the first year and succeeding years (118.40(1m)(b)10):

Arbor Community School will serve 40 students in the greater Madison area in multi-age classrooms with students in grades K-3 during the first year and 10 additional students in subsequent years, up to 90-100 students in year 6. To establish enrollment consistency during the 2019-2020 school year and beyond, ACS will enroll about 10 students in each grade level (K, 1, 2, 3). In subsequent school years, there will typically be 10 kindergarten vacancies. This number may be increased or decreased in the future as determined by the governing board.

- Enrollment in ACS is voluntary
- The enrollment period for students will be open for applicants not earlier than the first Monday in February and not later than the last weekday in April of the school year immediately preceding the school year.
- All interested families must submit an application to Arbor Community School. This applies equally to board members, employees, founders, and siblings of currently enrolled students.
- All applicants must be residents of Wisconsin.

- Applications are only valid for the specific school year to which the application applies.
- Applicants will be required to attend an informational meeting with a parent or guardian as part of the application process. The meeting will provide an overview of inquiry-based learning and additional components of the charter school. It will also inform families about student and parent expectations as members of ACS.
- If at the end of the enrollment window, if the number of applicants does not exceed the number of open seats in a given grade level, enrollment will be offered to all eligible applicants in that grade level and recruitment efforts modified in subsequent years to ensure consistency in grade levels going forward.
- If the number of applicants for a grade level exceeds enrollment spots available for that grade, a random lottery process will be used.
- If and when openings occur, eligible applicants will be offered enrollment in the order established by the lottery, or if there was no lottery required, enrollment will be offered in the order applications were received during the enrollment period.

Equitable Application Process

- Open Houses will be scheduled at varying days and times and open to all ages.
- Several opportunities to attend the enrollment meeting will be offered at varying days and times, and childcare will be provided to reduce barriers to attend this meeting.
- Application forms, schedules and other school information will be easily accessed and submitted from a mobile device, since not everyone has access to the internet from a laptop or desktop computer, but more than 90% of adults 18-49 have access to an internet-enabled mobile device.
- All forms will be available in English and Spanish and translation services will be provided for families as needed.

Sibling preference

The sibling preference is intended to keep families together. Siblings are defined as biological or adoptive, half-siblings or step-siblings residing in the same household, or foster children residing in the same household. For families with more than one student applying to ACS, the following will occur:

- If there is space available for all applying siblings, all siblings will be offered enrollment.
- Any sibling applicants of a student enrolled in the prior year shall be offered enrollment.

- Any sibling applicants of an applicant selected by the lottery process shall be offered enrollment.
- The sibling preference is extended even if it increases the number of students in a grade level above the 10 student ideal.

4.05 Describe strategies to be employed when, and if, more students apply for admission than there are seats available:

If more applicants are received during the enrollment window than spaces are available, this initial group of applicants make up the lottery pool, less any exemptions.

- ACS Board will perform the lottery and it will be part of the school record.
- A random selection process will ensure fairness and equal access without regard to ethnicity, national origin, disability, gender, or income level.
- Those students not accepted by the lottery will be placed on a priority waiting list in the order drawn. If and when openings occur, students will be offered enrollment in the order established by the lottery
- Exemptions from the lottery shall be granted, in the following order:
 1. Pupils enrolled in ACS in the prior year and their siblings
 2. Children of founders of Arbor Community School (Melissa Rosenkranz and Lynn Munsinger Brown)
 3. Children of full time employees of ACS

The total number of children exempted under criteria 2 and 3 above shall not exceed 10% of enrollment. Lynn and Melissa each have 2 children, all of whom will enroll in year 1.

5.00 FACULTY AND STAFF

5.01 Identify how administration, faculty and staff will be recruited and how the school will ensure the quality of the workforce:

Lead teacher job postings have been placed on WECAN, Indeed, and Handshake. Teachers are being recruited from PBL hotbeds with diverse populations, like Minneapolis/St.Paul, Milwaukee and Chicago. Job postings include a list of knowledge, skills, and abilities unique to positions at Arbor Community School, and hiring will be based on the candidates fit for this set of knowledge, skills, and abilities. Arbor Community School will follow any

applicable labor agreements which are in place and internal candidates will be made aware of unique job expectations to assure a good fit for the position.

Hiring Process:

- 1) The program coordinator will review the applications and screen candidates to be interviewed.
- 2) The Curriculum & Instruction committee (and a team of staff which includes the lead teacher when hired) will review screening interview recordings, teacher portfolios, and will conduct formal interviews.
- 3) The committee will use an interview rubric, adapted from a Fond du Lac STEM PBL charter school rubric, to evaluate the candidate's qualifications.
- 4) The committee will make a recommendation to the governance board.
- 5) Following reference and experience review and background check, the governance board will make a decision for final approval for offer of employment and contract.

5.02 Describe how job requirements, compensation, career progression workforce practices, and work environment will motivate faculty and staff to achieve high performance:

The compensation and benefits package for teachers at ACS will be competitive with that of neighboring school districts. Further, the model adopted by ACS gives teachers the freedom to teach authentically, following students' passions, and requires that teachers themselves engage in continuous learning. The educators that are drawn to this type of pedagogy are likely to embrace the independence of the work environment and the freedoms and challenges that come with it. In addition, extensive continuing education and professional development specific to IQ-PBL will be offered to improve performance and enable career progression.

5.03 Describe how the faculty and staff education and training programs will support the achievement of overall objectives:

Funding for professional development activities will be provided by our DPI grant. All staff members will receive ongoing training in IQ-PBL education, including focus areas: activating prior knowledge, providing background knowledge, defining outcomes for which students will be held accountable, modeling design product outcomes and providing frameworks, how to establish a general topic or inquiry, empowering students to teach one another, reflecting on what worked and what did not, and the process of revision. Additionally, staff will receive training on restorative justice practices, wellness-based education, culturally responsive instruction, literacy development, and authentic assessment techniques. All

staff will participate in ongoing job-embedded professional development. New staff members will work with veteran staff in taking up current and best practices.

Staff will model democracy, agency, empowerment, resilience, curiosity, compassion, and mindfulness for students, using resources and training described above to support their intrinsic capacities. The ACS teaching circle will develop and sustain itself as a professional learning community, modeling lifelong learning. The specifics of the three-year professional development plan are as follows:

Subject Area	2018-19 (planning)	2019-20	2020-21
Innovation	ISN conference on school innovation	ISN conference on school innovation	ISN conference on school innovation
IQ-PBL	5 days w/ consultant: implementing inquiry-based learning strategies in the classroom 5 days visiting other charter schools utilizing Inquiry-Based Learning 10 days curriculum development utilizing IQ-PBL	2 days w/ consultant: continued development of inquiry-based learning strategies in the classroom 2 days visiting other charter schools utilizing Inquiry-Based Learning 5 days curriculum development for IQ-PBL	2 days w/ consultant: continued development of inquiry-based learning strategies in the classroom 5 days curriculum development for IQ-PBL
Wellbeing	16 day Breathe for Change Workshop 2 days visiting Namaste Charter School	5 days w/ Center for Healthy Minds consultant: Kindness Curriculum 3 day Academy for Love of Learning conference	2 days w/ Center for Healthy Minds consultant: Kindness Curriculum
Environmental Education	5 days w/ Aldo Leopold Nature Center naturalist: implementing nature-based educational approaches	5 days w/ Aldo Leopold Nature Center naturalist: implementing nature-based educational approaches	5 days w/ Aldo Leopold Nature Center naturalist: implementing nature-based educational approaches

	2 days visiting Wildlands School	1 day visiting Wildlands School	School visits as required
	2 days visiting Tomorrow River Community Charter School	1 day visiting TRCCS	
Classroom culture	3 days w/ MG21 or other field expert on developing and implementing restorative justice strategies 2 days visiting other charter schools utilizing Responsive Classroom strategies	3 days w/ Responsive Classroom consultant 4 days workshop: implicit bias, restorative justice	Ongoing responsive classroom school collaboration 3 days visiting other charter schools utilizing Responsive Classroom strategies
Collaborative Leadership	3 day Holacracy self-organization training	3 day Teacher-Powered Schools Conference	2 days w/ consultant: teacher-led schools
Governance	5 days w/ Board on Track to set goals, develop policies 2 days w/ consultant: shared leadership model DPI training: WI Professional Educator Standards Attend OEO governance trainings Attend ISN conference on school innovation	5 day workshop: fiscal, student, staff accountability, school sustainability, community partnerships, Robert's Rules of order Attend OEO governance trainings Attend ISN governance trainings Attend ISN conference on school innovation	1 day review of shared leadership model Annual review of board duties, school policies Annual review of Educator Effectiveness Standards Attend ISN conference on school innovation

5.04 Describe how the work environment will foster learning and continuous improvement for both staff and students:

Educators and staff will model democracy, agency, empowerment, resilience, curiosity, compassion, and mindfulness for students, using resources and training described in 5.03, to support their intrinsic capacities. The ACS teaching circle will develop and sustain itself as a professional learning community.

5.05 Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction (118.40(1m)(b)7):

Individuals employed to work as instructional staff at the charter school will, at a minimum, hold such current licenses or permits as are applicable to charter schools and/or are required by state law or the Wisconsin Department of Public Instruction. ACS will make available to OEO upon request, all licenses, certifications, and employment contracts for personnel engaged at the school.

5.06 If applicable, describe how the school will partner with University of Wisconsin System institution(s) or other institution(s) of higher education:

We will partner with Education Outreach & Partnerships in the UW School of Education for support in professional development. We will leverage the expertise in the science of wellbeing of the Center for Healthy Minds via Melissa and her colleagues. In addition, Melissa has made connections with researchers at Stanford University and Cornell University with expertise in investigating the impact of purpose and meaning in student engagement, persistence, and achievement in educational settings. These researchers have expressed interest in measuring the impact of this educational model. Finally, Melissa has a long-standing relationship with Dr. Carol Ryff, Hilldale Professor of Psychology, with whom we will consult on measuring wellbeing in order to assess our model. Dr. Ryff is one of the world's leading experts in psychological wellbeing across the lifespan.

6.00 CURRICULUM AND INSTRUCTION**6.01 Describe the educational program of the school (118.40(1m)(b)3):**

We propose a new school model, combining research on the science of wellbeing in an IQ-PBL framework and multi-age setting. This model will serve the Madison population initially but could be replicated and scaled due to its strong conceptual framework.

Arbor Community School is modeled around the research of personalized learning with purpose and meaning, in a democratic environment, in order to optimize student engagement. We define personalized learning as a school in which students have a voice in setting their own goals and learning pathways in addition to how, when, and what they learn and how it's represented and assessed. This model will be accomplished through Inquiry- and Problem-based (IQ-PBL) Learning.

Arbor Community School defines IQ-PBL with the following essential elements: meaningful content, 21st century skills, in-depth inquiry, driving question, need to know, voice and choice, revision and reflection, and public audience. Whatever form a project takes, it must have or develop these essential elements to meet our definition of IQ-PBL:

Meaningful Content At its core, the problem or inquiry is focused on teaching students important knowledge and skills, derived from standards and key concepts at the heart of academic subject areas. At the same time, the problem or inquiry must be focused on a topic or subject area that is meaningful to the student or addresses a need in their sphere.

21st Century Skills Students build skills valuable for today's world, such as critical thinking/problem solving, innovation, collaboration, and communication, which are taught and assessed.

In-Depth Inquiry Students are engaged in a rigorous, extended process of asking questions, using resources, and developing answers.

Driving Question Work is focused through an open-ended question that students explore or that captures the task they are completing.

Need to Know Students see the need to gain knowledge, understand concepts, and apply skills in order to answer the Driving Question and solve their problem, beginning with an Entry Event that generates interest and curiosity.

Voice and Choice Students are empowered to make choices about the problems or inquiries on which they will focus, how they work, and how they use their time, guided by the teacher and depending on age level and IQ-PBL experience.

Revision and Reflection The project processes require students to use feedback to consider additions and changes that lead to high quality products, and reflect on what and how they are learning.

Public Audience Students present their work to other people, beyond their classmates and teacher.

Ultimately, an inquiry or problem should be a rigorous learning experience. It is not the dessert you serve students so they can “have fun” or “get a hands-on experience” after a traditional unit of instruction. Instead, a project is the main course that organizes the unit. In most cases, it’s helpful to actually think of the inquiry or problem as the unit.

6.02 Identify the content of the instructional program:

ACS is innovative and unique for a variety of reasons. Chiefly, ACS utilizes a full IQ-PBL model in a multi-age setting, requiring students to be “in the field”, working hand in hand with community members, as they expand their understanding and demonstrate a strong ability to meet the Common Core Standards. Collaboration with the local and global community will be vital to student growth and the level to which these partnerships are formalized will set ACS apart from the norm. Students will explore the world through interest-based play, learning both independently and collaboratively. The focus of learning will be centered around alternative skill sets first and traditional content second. Teachers will act as facilitators and supports to the learners. In addition, students will be utilizing creative approaches to prepare and present what they have learned. Technology will be used with discretion in order to provide students more diverse, interactive, experiential ways of gathering information and learning.

Arbor Community School is also unique in that the daily instruction is not related to a prescribed lesson from a teacher’s manual. Daily learning is set up to help each student meet individualized learning goals. This characteristic requires ACS teachers to personalize lessons, pulling from a variety of resources to meet needs, rather than relying on a prescribed lesson plan and pacing guides. Students will be given time to explore topics that are important to them, with student choice serving as the vehicle for learning rather than using an existing program such as Full Option Science System (FOSS) or Everyday Math. Authentic and extended project-based learning is only possible with:

- Flexibility in the schedule and significant reduction in the practice of curriculum “pacing”, which are possible in the context of a charter school. The problem or

inquiry will dictate the amount of time needed to delve into a concept. Learning will not be segmented into blocks of time for certain concepts.

- The ability to fully integrate Common Core Standards in math, literacy, science, social studies, and other foundational areas through a project-based process
- Greater frequency of field experiences in order for students to develop, implement and present their projects with community members.

All learning will be connected directly to the Common Core Standards rather than relying on a program to make the connections. Further, the development of 21st Century Skills during student collaboration, presentations, and assessments will serve as a cornerstone of our instruction; ensuring students are prepared to participate skillfully in the world around them as emerging adults. Students will develop strong non-cognitive skills including but not limited to: mindfulness, compassion, agency, autonomy, self-regulation, perseverance, planning, goal-setting, resilience, reflection, cooperation, perspective-taking, communication, and organization.

6.03 Characterize the instructional methodology to be utilized by the faculty (118.40(1m)(b)4):

ACS is centered on the idea of a three-dimensional model. A three-dimensional model focuses on concepts, principles and generalizations, using related facts and skills as tools to gain deeper understanding of disciplinary content, transdisciplinary themes and interdisciplinary issues, and to facilitate conceptual transfer through time, across cultures and across situations. Three-dimensional models value a solid base of critical factual knowledge across the disciplines, but they raise the bar for curriculum and instruction by shifting the design focus to the conceptual level of understanding. This focus necessarily requires a supporting role for factual knowledge. A corollary goal of concept-based instruction that is seldom stated overtly is development of the intellect. In a concept-based instruction model teachers use the facts in concert with concepts and generalizations to effect higher order, synergistic thinking. Facts provide the foundation and support for deeper, conceptual thinking and understanding. Three-dimensional concept-based curriculum models value student inquiry and constructivist learning to support personal meaning-making. http://www.ibmidatlantic.org/Concept_Based_Teaching_Learning.pdf

Students will apply their knowledge and conceptual understanding to problems and questions that are meaningful to them, including in ways that benefit local and global communities. A multi-age setting allows students to collaborate with peers of different ages and abilities, thus establishing an authentic societal setting in the classroom. Given the age of these students, special attention will be paid to core educational concepts,

helping to scaffold projects, and build application of learning strategies. As students meet benchmarks and demonstrate proficiency in the Common Core Standards, there will be a gradual increase of personal responsibility for the selection, completion, and application of projects, while still receiving instructor guidance and support. Through carrying out projects, students will develop an ability to manage and organize tasks within a selected timeframe.

Teachers will serve multiple roles within the project-based multi-age setting. Students new to ACS will require more individualized core instruction than those further along in the program. Thus, teachers will provide additional guided instruction of basic reading, math, and science skills to first year pupils. As students progress, the teachers' role will shift to include more facilitating of projects, mentoring and providing students with project appropriate resources. A key role of the teachers will also include helping students understand ways in which they learn and communicate best, preparing them for future success. In each phase of learning, teachers will guide students in selecting rigorous projects, set high levels of expectation and ensure proficiency in the Common Core Standards.

Teacher practices may include the following to ensure the needs of students are being met at any given time: Conferring (Halverson), Workshop Model (Calkins), Democracy (Michael Apple), Play (Graue), Exploration and risk-taking, Expeditionary Learning and Grit, Democracy and student/family voice (Michael Apple), Formative Feedback and Conferring as pillars of learning (Falchikov, Wiggins, Stiggins, Calkins) and Personalized Learning Plans where students determine their own goals and learning pathway in addition to how, when, and what they learn and how it's represented and assessed.

6.04 Explain how chosen instructional content and methodology will achieve the school's objectives:

See section 1.07

6.05 Describe the research that supports this approach to educating children:

IQ-PBL pedagogies have repeatedly been shown to increase the intrinsic value of learning and the self-motivation and effort regulation of students (Sungur & Tekkaya, 2006). Compared to traditional teaching methods, inquiry- and problem-based methods increase critical thinking skills in elementary school students (Shepard, 1998). While there is ongoing debate about the superiority of IQ-PBL over more traditional methods (e.g. Kirschner, Sweller, & Clark, 2006; Hmelo-Silver et al., 2007), when looking at the metrics for which

IQ-PBL methods **should** out-perform traditional methods, such as application of knowledge (Dochy et al., 2003), extension of knowledge to new problems (Derry et al., 2006), complexity of thinking (Patel et al, 1993), and solving multi-step problems (Cognition and Technology Group at Vanderbilt, 1992), the data generally does favor IQ-PBL. Nonetheless, in studies where IQ-PBL methods are not found to be superior to traditional methods, they are typically not inferior (i.e. they lead to comparable outcomes). Further in one large-scale study of urban middle schoolers, IQ-PBL instruction led to significantly better performance on standardized testing, which persisted far beyond the end of the IQ-PBL period and scaled with exposure, where those students who spent more time immersed in the IQ-PBL method showed bigger performance gains (Geier et al., 2008).

It is important to note, however, that traditional academic outcomes are not the singular focus, nor even the highest priority of ACS. As indicated previously, our model inverts the traditional approach: whereas traditional models make core proficiencies and content primary, with the logic that they will ultimately lead to success and thus wellbeing, ACS seeks to develop a strong foundation of wellbeing, resilience and curiosity as prerequisites for sustainable and life-long learning and to the flexible and innovative application of core content.

6.06 Describe the program design, methods and strategies for serving students with disabilities and for complying with all related federal laws and regulations:

Arbor Community School is committed to serving children with known existing or newly identified disabilities. We will utilize alternative assessment procedures that follow state and federal special education laws and policies. Through its policies and procedures, ACS will comply with the requirements set forth by the Individuals with Disabilities Act, Section 504 of the Rehabilitation Act, and applicable provisions of Subchapter V of Ch 115, WI Statutes, including but not limited to identifying, evaluating, planning programs and services, and providing a free and appropriate public education, as required by law.

Due to the differentiation of content, process, and product in IQ-PBL, IEP or other accommodations will not be obvious to anyone in the classroom, and might not even be noticed by the recipient of the accommodation, creating inclusivity and equity in the classroom. By allowing students to take different paths and explore different interests in a project, students in the same class may be working on very different things at any given time. This normalizes the students who **need** different supports, alleviates any stigma that students may perceive, and reinforces a culture of individuality and self-management that leads to students' owning their learning. For example, students may be studying the same concept using different methods, and will routinely use a variety of ways to demonstrate

their learning, so that students with varying abilities, interests, and learning styles can show what they have discovered.

Beyond this, IEPs often include goals such as augmentative communication, self-management, or nuanced social skills. At ACS, the emphasis on 21st century skills provides daily opportunities to work on these goals in an authentic and natural context. For example, when students work in teams, they constantly practice communication, social skills, organization, self-management, self-determination, and self-advocacy.

The culture of staff collaboration at ACS will also greatly benefit special needs students. By monitoring student progress toward meeting goals, teachers, will continually be collaborating to meet specific needs. This collaboration will manifest in the project design for each student.

Further, Arbor Community School has contracted with the law firm Boardman & Clark, which has extensive experience in this area and will provide counsel to ensure policy compliance with IDEA, IEPs, and more.

6.07 Describe the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations:

The ACS governance board will develop policies for complying with all federal laws and regulations relating to English Language Learners, including but not limited to:

- Surveying all students upon enrollment to determine languages used at home, the language they first learned, and the language they use most often.
- Evaluating needs of Limited English Proficiency (LEP) students, on an individual and ongoing basis, to determine the appropriate support and services the student may need to be successful.
- Ensuring ELL students receive the tools they need to learn English in a timely manner and receive meaningful access to the rest of the school's instructional program.

Again, the IQ-PBL model normalizes individuality and allows for teachers to scaffold learning to meet the needs of students in an equitable way. In the context of an interdisciplinary model, it is not necessary to pull LEP students out of core subjects in order

to take part in English lessons. Instead, projects provide authenticity for students, which can be more engaging than studying words and skills in an abstract way. Further, the collaborative aspect of IQ-PBL allows LEP students to be supported by their peers and provides opportunities to practice vocabulary and other language structures and functions. Additionally, as a school that celebrates cultural differences, students might leverage their bilingual or multilingual status as an asset. Perhaps they could create a project product in English and another language, broadening the audience and impact. Or perhaps a project's meaning could be deepened by exploring it through the lens of a different language and culture, bringing cultural relevance to the project that would not be attainable if not for the student's language abilities.

7.00 STANDARDS, ASSESSMENT, AND ACCOUNTABILITY

7.01 Describe the standards on which the educational program will be based:

The educational program of ACS is based on academic and non-academic standards. The Kindness curriculum standards center around "A to G": Attention, Breath and Body, Caring, Depending on Others, Emotions, Forgiveness, and Gratitude. In the IQ-PBL model, students will learn all the of the core academics that students in the traditional setting learn; it is the approach to that learning that is fundamentally different. Common Core Standards will serve as reference for academic goals for students and will be explored in innovative, multi-disciplinary, and culturally relevant ways.

PBL has an emphasis on significant content and 21st century competencies, which provide the "what" when designing a rigorous, relevant, and engaging project. The "how" of PBL allows for deeper thinking and aligns to common core standards that emphasize application of knowledge rather than recall of facts. For example, common core standards for math echo PBL best practices: setting expectations for students to do real-world problem solving, use (mathematical) modeling, apply statistical analysis, and communicate their understanding. Such applications naturally have a place within high-quality projects that ask students to use mathematical concepts and procedures in authentic contexts.

Even when Common Core Standards do not have an explicit project-based tone, there is a focus on the key competencies needed for PBL: inquiry, communication, and critical thinking.

7.02 Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined (118.40(1m)(b)5):

ACS will use both traditional and non-traditional forms of assessment and accountability to gauge student learning. The school will minimally provide summative, benchmark, and formative assessments each year. Assessments may include any of the following:

- Student Performance on the Forward Exam (state testing)/or any other mandatory State testing
- Annual Review of Student Personal Learning Plan
- Parent Satisfaction Survey
- Timely progress reports
- Student Attendance Data
- Student Discipline Data
- Parent/Teacher/Student led Conferences
- Ongoing teacher evaluation of student progress
- Student self-evaluation of progress
- MAPs/NWEA testing
- DIBELS
- 4k and K student testing: PALS
- Comprehensive Student Portfolio
- Performance-based assessment through Project Learning
- Subject area and Skill based tests
- Presentation of capstone projects
- Testing described in Wis. Stat. §§ 118.30(1r) and 121.02(1)(r).

7.03 Describe the requirements for high school graduation (if applicable) and/or grade promotion:

As a school that utilizes multi-age classrooms in grades K-8, students will progress from one multi-age class to another according to their age, but will have the opportunity to learn at their own pace. Students will be given more time to gain mastery in areas of difficulty and be able to assist others in areas in which they are stronger. These opportunities result in students learning and performing in their area of excellence, boosting self-esteem and building empathy among classmates.

7.04 Define how the results of the educational program will be assessed:

The educational program of ACS will be assessed according to the progress made toward school goals as reflected in the four pillars:

Pillar	Indicators
Equity	<p>Diversity - Appreciation and celebration of diversity among students, families, and staff; diverse cultures, histories, and perspectives reflected in curriculum</p> <p>Equality - Fairness of ACS processes and policies</p> <p>Inclusion - Inclusion of all students, especially those with educational, physical, mental, emotional, or developmental challenges</p> <p>Family Involvement - Degree to which ACS helps families support their student's education</p>
Community	<p>Procedures - The degree to which ACS procedures facilitate participation</p> <p>Communication - The effectiveness of communication strategies to allow flow of information between and among ACS students, teachers, governance board, and the larger community</p> <p>Opportunities - The degree to which community partnerships are enhancing student learning</p> <p>Cohesion - The degree to which ACS creates a sense that students feel like part of a larger whole</p>
Wellbeing	<p>Wellbeing indicators, (e.g. perseverance, autonomy, agency, etc) will be assessed with behavioral and both self-report as well as teacher or parent report measures such as the Strengths and Difficulties Questionnaire, non-cognitive measures of Social/Emotional Learning and self-regulation (such as those reviewed in Halle & Darling-Churchill, 2016).</p>
Nature	<p>Knowledge - Awareness of, comfort in, and sensitivity to nature</p> <p>Attitude - Enthusiasm and concern for the natural world</p> <p>Behavior - Understanding of how environmental problems can be prevented or mitigated</p> <p>Connection - Sense of interconnectedness/place</p> <p>Participation - Increased use of natural areas, participation in environmental improvement and protection</p>

7.05 Describe the student achievement goals that will be met during the first five years of operation:

Student Outcomes	Measurement	By end of First Year 2019-2020	Subsequent Years AYs 2020-2024
Students will be proficient in reading	MAP for Primary and MAP (Fall and Spring)	70% of students will score in the Average or High-Average range for their age group.	5% increase from the prior year
Students will be proficient in math	MAP for Primary and MAP (Fall and Spring)	70% of students will score in the Average or High-Average range for their age group.	4% increase from the prior year
Students will be proficient in science	MAP for Primary and MAP (Fall and Spring)	70% of students will score in the Average or High-Average range for their age group.	4% increase from the prior year
Students will see themselves as learners	Teacher observation, student surveys	70% of students will show 2% increase in growth mindset	5% increase from prior year
Students will believe in their ability to achieve an outcome or reach a goal	Teacher observation, student surveys	70% of students will show 2% increase in self-efficacy	5% increase in students showing 2% increase in self-efficacy
Students will regulate their emotions, thoughts and behaviors	Teacher observation, student surveys	75% of students will show 2% increase in self-management and resilience	5% increase in students showing 2% increase in self-management and resilience
Students will understand others' perspectives and empathize with them	Teacher observation, student surveys	75% of students will show 2% increase in social awareness	5% increase in students showing 2% increase in social awareness
Each student goal above (reading, math, science, SEL indicators) will be broken out by			

ethnicity, poverty (free and reduced lunch), gender, ELL, and SPED to identify disparities between various student groups and indicate academic outcomes for educationally disadvantaged students			
Families will feel they can support their child's learning	Section 1, 3, 4, and 6 of Family engagement partnership survey (https://dpi.wi.gov/sites/default/files/imce/fscp/pdf/tk-measure-partshps.pdf)	70% of families will feel confident in their ability to support their child's learning	2% increase from prior year
Families will feel the school provides an inclusive and culturally responsive environment	Sections 2 and 5 of Family engagement partnership survey	75% of families will feel the school is inclusive and have opportunity to influence decision making	3% increase from prior year

Other demonstrations of student progress: presentations, reports, performances, and exhibits will take place periodically during the school year. In addition to the assessment tools above, the daily, weekly and monthly teacher monitoring and observation of students provides ongoing formative and summative assessments. Additional assessments may be used to measure student achievement in the following areas:

- Ability to communicate clearly both orally and in writing
- Understanding of various cultures
- Understanding of scientific process and disciplines
- Knowledge of history
- Ability to think creatively, analytically and logically
- Ability to observe, gather, organize, analyze and synthesize information
- Lifelong learner who has developed competence, self-motivation, confidence and responsibility

7.06 Describe how the school will ensure the quality and availability of needed data and information:

ACS will communicate with families the value of assessment as it relates to their student. The school will work with the authorizer and other stakeholders to determine the required success indicators. Assessment procedures will ensure quality of data collected and all assessment records will be stored according to the state records retention policy using a Student Information System approved for WISEdata integration.

7.07 Describe how standards, assessment, and accountability will be integrated into a coordinated system:

Assessment data will be reviewed with students and families and learning goals will be identified. Common assessments will be developed and administered to monitor student progress and track student achievement of established goals. The following common assessments will also be used to evaluate the effectiveness of the model and methods of instruction. Individual Learning Plans, student discipline data, ongoing teacher evaluation, reflection of student progress, report cards, student and community surveys, assessment of projects, student self-evaluation, and outside feedback from project-based learning experts.

Arbor Community School will adopt the Common Core Standards as the primary guiding instructional objectives for all students, replacing prescribed programs with student, family, and teacher-created learning plans. The autonomy provided by adopting the Standards allows for the student choice that is necessary in a project-based learning classroom, and enables students to take accountability for their own learning.

Teachers, families and students will work together to design projects that:

- Demonstrate effective use of the Standards
- Require students to have an understanding of their educational strengths and weaknesses
- Are rigorous
- Provide for student input into the concepts through which the skills are developed

7.08 Describe how effective performance management systems will be provided to improve student and organizational performance:

Professional Practice Goals and School/Student Learning Objectives will be developed jointly by the governance board and educators based on needs and makeup of incoming students and the professional development goals of the educator. The goals will reflect the pillars of the school and cover non-academic and academic objectives.

7.09 Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject:

Where possible, ACS will follow the MMSD schedule to accommodate families who utilize vacation day programming in the Madison area.

September 3, 2019	First day of school
October 25	No school (Staff PD)
November 21	No school (conferences)
November 27, 28, 29	No school, Thanksgiving break
December 9	No school (Staff PD)
December 23 - Jan 3	No school, Winter break
January 20	All school/family community service day. Martin Luther King, Jr. Day
January 24	No school (Staff PD)
February 7	No school (Staff PD)
February 28	No school (Staff PD)
March 20	No school (Staff PD)
March 30-April 3	No school, Spring break
April 16	No school (conferences)
April 27	No school (Staff PD)
May 25	No school, Memorial Day
June 5	Last day of school

Total number of days of instruction in year 1 will be 170 days (1275 hours of instruction). Each school day, students will attend school from 7:45am to 3:15pm. There will be no “early release” days. Typically lunch is not included as instructional time as per the DPI administrative code, but ACS includes this as instructional time since setting tables, sharing an intentional meal with others, and working within a community to provide for clean-up are all part of the wellbeing curriculum. Still, even if 30 minutes are deducted from each day, the 1190 hours of instruction are well above the code minimum. Due to the

interdisciplinary nature of the program, it is estimated that the number of minutes of instruction per subject will be between 200-300 minutes per week.

7.10 Describe how the school will transfer knowledge to educators, including cross-sector collaboration:

IQ-PBL is heavily collaborative by nature and so knowledge transfer among teachers happens more seamlessly. Further, teachers will meet daily to discuss and make decisions and so through this frequent exchange, knowledge transfer will be accomplished.

In addition, when a subset of the teaching staff participate in conferences or professional development opportunities, they will share what they have learned with the teachers that did not take part during longer weekly reflection meetings.

8.00 EDUCATIONAL SUPPORT PROCESSES

8.01 Describe how key processes for design and delivery of the educational program will be managed:

The design of the educational program has been initiated by professionals with expertise in wellbeing, IQ-PBL curriculum, restorative-justice approaches to conflict resolution and discipline, and community outreach, and is being informed by the guidance and oversight of the founding governance board. Teachers will be included in the process as early as possible to co-create the educational program and plan for implementation and delivery. The professional development plan budget includes 90 days of extended contract for teachers to be involved in the development of the educational program. Teachers will be responsible for ensuring that the educational program is delivered in accordance with the mission and vision of the school, with the governance board serving as an additional layer of accountability.

8.02 Describe how instructional content and methodology will be continuously improved:

Instructional content and methodology will be continuously improved through professional development and continuing education in IQ-PBL methodologies. A school culture of open curiosity and continuous learning will encourage added innovation and creativity in the extent and application of content and methodology. See section 7.04 for how the instructional content will be assessed and section 5.03 for the professional development

plan to support continuous improvement.

8.03 Explain the procedures for ensuring the health and safety of students (118.40(1M)(B)8):

Arbor Community School will comply with all applicable federal and state laws regarding health and safety. The ACS governance board and staff will enact policies concerning child welfare, safety, and health, including but not limited to abuse, neglect, truancy, accident prevention, disaster response, emergencies, and lawful operation of school facilities.

8.04 Identify the procedures for school discipline, suspension, and potential removal of a child from the program (118.40(1M)(B)12):

Procedures for discipline will be closely aligned with the pillars of the school - promotion of wellbeing, equity, and community. Rules and codes of conduct will be established collaboratively with students at the beginning of each year and revisited often. Discipline will be approached using a restorative justice model, moving into a Keepers of the Culture approach as children enter 6th grade. There are many examples of successful implementation of this approach in elementary schools, of which we will use for guidance. For example, the use of “weather reports” described by Teri Ashley (Fort Collins, CO) to gauge how students are feeling as they arrive at school and to begin to connect their feelings with their behavior and habits and provide support when necessary. The following describes an approach used with elementary school-aged children: when conflicts arise, those involved will each complete a conflict report form. This provides the space and opportunity to calm down, articulate the problem, and describe how they feel and what they need and want in the situation. Each participant in the conflict will suggest 3 ways to resolve the conflict and restore good peer relations. In addition, each participant will suggest 3 approaches they could use the next time this conflict emerges. At this point the teacher joins the discussion to facilitate an agreement/resolution (ie Peace Contract). Borrowing from Montessori pedagogy, the students may wish to chime a bell or otherwise signify their sense of a restoration of order. In addition to resolving conflict, this strategy builds skills important to wellbeing, equity and community, including emotional awareness, perspective-taking, and problem-solving. In higher grades, this strategy can become more sophisticated, where students themselves do most of the facilitation, as occurs in programs that use “Keepers of the Culture”. For support and guidance in this domain, we will utilize the Peace Learning Center (<https://peacelearningcenter.org/youth-workers-and-school-staff/>) and Learning Cultures (<https://learningcultures.net/>).

As a school with a focus on wellbeing, it is our mission to maintain a healthy and functioning school community, which includes learning how to resolve conflict and self-regulate. Students will only be removed from the school community in circumstances where they are a danger to themselves, other students, or school staff. In matters relating to the disciplining of students with disabilities, ACS shall abide by Federal and State laws.

Draft Policy:

SUSPENSION

A teacher designated by the Governance Board may suspend a student for up to five (5) school days or, if a notice of expulsion hearing has been sent, for up to fifteen (15) consecutive school days, or ten (10) consecutive school days for each incident if the student is eligible for special education services under Chapter 115, Wis. Stats.

The suspension must be reasonably justified based upon the grounds authorized under Sec. 120.13, Wis. Stats., which include, but are not limited to: noncompliance with school rules or Board rules; knowingly conveying any threat or false information concerning an attempt or alleged attempt being made or to be made to destroy any school property by means of explosives; conduct by the student while at school or while under the supervision of a school authority that endangers the property, health, or safety of others; conduct while not at school or while not under the supervision of a school authority that endangers the property, health, or safety of others at school or under the supervision of a school authority; or conduct while not at school or while not under the supervision of a school authority that endangers the property, health, or safety of any employee or Board member of the Arbor Community School.

The Governance Board shall suspend a student if the student possessed a firearm, as defined in 18 U.S.C. 921(a)(3), while at school or while under the supervision of a school authority.

The parent of a suspended minor must be given prompt notice of the suspension and the reason for the suspension. The student's suspension from school shall be entered in the student's record. The suspended student or the student's parent or guardian may confer with the president of the ACS Governance Board to discuss removing from the student's records reference to the suspension. Reference to the suspension on the student's school record shall be removed if the president of the board finds that the student was suspended unfairly or unjustly; the suspension was inappropriate, given the nature of the alleged offense; or the student suffered undue consequences or penalties as a result of the suspension.

A suspended student shall not be denied the opportunity to take any quarterly, semester, or grading period examinations or to complete course work missed during the suspension period. Such work shall be completed pursuant to the procedures established by the Board.

In the event a student is classified as Homeless, the board shall consult with a social worker to determine whether the conduct is a result of homelessness. The social worker will assist teachers

and the student's parents or guardian in correcting conduct subject to disciplinary action that is caused by homelessness.

EXPULSION

Under this policy, expulsion shall mean the Board will not permit a student to attend school at all for a specified period of time. If the student is expelled, the Board will determine the length of the expulsion period, which may extend at a maximum to the student's 21st birthday.

The Board may expel a student only when it is satisfied that the interest of the school demands the student's expulsion and only when the student: repeatedly refused or neglected to obey the rules established by the board; knowingly conveyed or caused to be conveyed any threat or false information concerning an attempt or alleged attempt being made or to be made to destroy any school property by means of explosives; engaged in conduct while at school while under the supervision of a school authority that endangered the property, health, or safety of others; engaged in conduct while not at school or while not under the supervision of a school authority that endangered the property, health, or safety of others at school or under the supervision of a school authority or endangered the property, health, or safety of any employee or Board member; or was at least sixteen (16) years old and had repeatedly engaged in conduct while at school or while under the supervision of a school authority that disrupted the ability of school authorities to maintain order or an educational atmosphere at school or at an activity supervised by a school authority and that such conduct did not otherwise constitute grounds for expulsion. For purposes of this policy, conduct that endangers a person or property includes making a threat to the health or safety of a person or making a threat to damage property.

The Board shall expel a student from school for not less than one (1) year whenever it finds that the student brought a firearm to school or, while at school or while under the supervision of a school authority, possessed a firearm, as defined in 18 U.S.C. 921(a)(3), unless the Board finds that the punishment should be reduced based upon the circumstances of the incident. Any such finding by the Board shall be in writing.

As required by 20 U.S.C. 7151, the Governance Board will report any incident of expulsion to the Wisconsin Department of Public Instruction.

Prior to expelling a student, the Board shall provide the student with a hearing. Prior written notice of the hearing must be sent separately to both the student and if the student is a minor, to his/her parent(s) or guardian(s). The notice must be sent at least five (5) days prior to the date of hearing, not counting the date notice is sent. The notice must also satisfy the requirements of Sec. 120.13(1)(c)4, Wis. Stats.

An expelled student or, if the student is a minor, the student's parent(s) or guardian(s) may appeal the Board's expulsion decision to the Wisconsin Department of Public Instruction. An appeal from

the decision of the Department may be taken within thirty (30) days to the circuit court for the county in which the school is located.

In the event a student is classified as homeless, the governance board shall consult with a social worker to determine whether the conduct is a result of homelessness. The school will not expel a homeless student for conduct that is caused by the student's homelessness. The social worker will assist the student's parents or guardians in correcting conduct subject to disciplinary action that is caused by homelessness. If the conduct in question is determined not to be caused by the student's homelessness, the board shall proceed with expulsion proceedings as outlined in this policy.

The governance board shall provide continued educational services, including a written plan, with a designated school contact person, to expelled students during the term of their expulsions as deemed reasonable and appropriate. The educational services provided to expelled students with disabilities shall be provided consistent with applicable legal requirements.

8.05 Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities and emergency contacts. Attach the student record plan and related policies and practices:

Arbor Community School will utilize a cloud-based school administration and school information management solution that is Ed-Fi compliant (currently Tyler, Skyward, PowerSchool, or Infinite Campus). We are currently investigating pricing models and service levels of each of these solutions and will select the best option to suit the school's needs.

8.06 Identify key student services and how they will be managed:

Student services will be made available to any ACS student as required to ensure student success and wellbeing. Services such as special education, specialized reading assistance, or guidance counseling will be provided as needed. ACS will hire or contract for full or partial FTE services, such as special education, speech/language, and/or occupational therapy specialists as required.

8.07 Describe how key processes that support daily operations will be managed:

Daily operations of ACS will be managed by the staff. Full-time and part-time staff will work collaboratively to provide for administrative services (e.g. logging attendance, answering the phone, attending to visitors, printing/copying, etc.). A part-time nutritionist will plan and prepare meals in the facility kitchen. Custodial and maintenance services will be provided

by the facility owner. Students will participate in deciding how to care for their space and how to prepare their meals. This ownership and agency is central to the mission of ACS and will help build a foundation of responsibility and respect.

8.08 Describe the special education program to be provided including governance, pupil identification, development of IEP's (Individualized Education Programs), delivery of special education and related services and program financing:

Any student with an IEP will be served in the same manner and quality as any other student. IEP teams will be created and will meet to discuss modifications necessary to best meet the individual needs of the student. ACS is set up in a way that supports the framework for effective special education. The use of IQ-PBL as the primary educational model incorporates student choice and motivation in selection of projects. For example, students with special needs will use their project outline to address specific goals within their IEP, further allowing this population to work at their level to maintain steady progress.

Because of the individualized nature of the IQ-PBL curriculum, IEPs and related services can be woven seamlessly into the goals of students needing this support, without separating these students from their learning environment or drawing attention to their needs as different from their classmates. In fact, in IQ-PBL schools, **every** student is essentially learning according to their own individualized plan, where student strengths are highlighted and strategies to help the student overcome challenges and struggles are incorporated into the classroom environment, routine, and teaching style. ACS teachers will meet with families and students as often as necessary to ensure accommodations and modifications are met for students of all learning styles, in a way that is equitable and inclusive, and values overall long-term wellbeing of the student.

9.00 BUSINESS AND FINANCIAL OPERATIONS

9.01 Identify the individuals and their level of expertise who were involved in developing the schools financial plan:

Lynn Munsinger Brown developed the financial plan. Lynn holds a business degree in organizational management and IT from the University of Colorado - Colorado Springs and has served on the board of Woodland Montessori School (WMS) for 5 years. WMS is a 501(c)(3) non-profit organization with a \$1.3 million dollar budget serving just over 100 students ages 16 months - 6 years.

ACS received consultation on the school's financial plan from numerous charter school developers and school finance professionals. Additionally, the school's proposed budget was approved as part of the fully-awarded DPI grant that was evaluated by DPI's panel of expert reviewers.

9.02 Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school:

ACS will contract with CESA2 for some of the business aspects of the school, such as accounting and payroll. Legal services are provided by Boardman-Clark attorneys. The program coordinator role provided for by the grant is responsible for developing the administrative infrastructure of the school. Teachers will identify roles associated with other management tasks and assign them to staff according to experience, expertise, and interest.

9.03 Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required:

Arbor Community School has received a 5 year, \$700,000 charter school planning and implementation grant from the WI Department of Public Instruction. The grant covers one-time startup costs, including professional development for teachers and governance board members, hiring and compensating teachers during planning, and acquiring necessary supplies, equipment and educational materials. Additionally, the grant application includes budget for carrying out community engagement activities and providing for other appropriate, non-sustained costs related to activities in opening and preparing for the operation of charter schools.

Additionally, a \$70,000 line of credit has been secured from Monona State Bank.

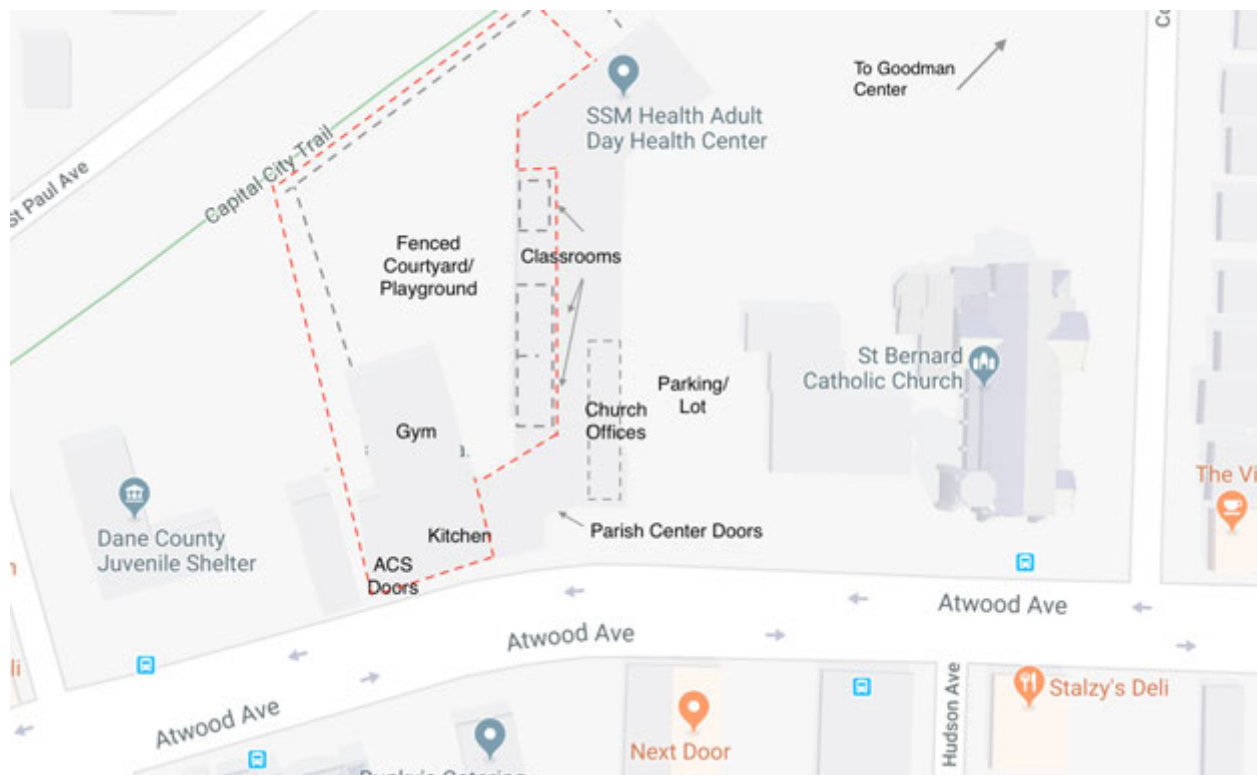
9.04 Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation:

Arbor Community School will be located at 2438 Atwood Avenue, Madison WI.

The location will be rented from St. Bernard's Parish at a cost of \$36,000 in the first year (roughly \$5 per student per day). No renovations are required, although the school will likely replace the existing toddler-sized toilets in the classrooms with standard-sized ones at a cost of \$1600.

9.05 Provide a description of the school facility, or proposed facility and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility (118.40(1M)(B)14):

The screenshot below shows the location of the school. ACS will utilize space in a building that is owned by St. Bernard Parish and shared with parish offices and an adult daycare facility. The school will have exclusive use of 2 classrooms, an office, and hallway lockers. ACS will have use of an auxiliary classroom, a gym, and a commercial kitchen on school days, except by arrangement. The school will also have shared use of a hallway, storage areas, and a large outdoor playground/courtyard. The leased area is outlined in red, below.



Students, staff, and school visitors will enter the school via dedicated doors located on the far West end of the building. The doors open into a full-sized gym area (4160 sq.ft) which includes a stage and restrooms. The kitchen is adjacent to the gym and it is anticipated that students will utilize a portion of the gym for meals. Students, staff, and school visitors access classrooms by way of the courtyard. The courtyard is a large black-topped space situated between the gym and classroom building, with fencing along the rear of the property that backs to the Capital City Bike Trail and Atwood Community Gardens. A portion of the courtyard is elevated and wood-chipped and contains wooden playground equipment. The courtyard also contains a sheltered pavilion for project space or outside meals. The 2 indoor classrooms are directly accessed from the courtyard and are 960 sq ft each. They were most recently used for a preschool which included a community-based 4K program. Each classroom receives natural light from windows and the ceiling, fixtures and flooring are in excellent condition. The classrooms contain ample space to arrange furniture in flexible layouts, and each contains 2 gender-neutral restrooms. A third classroom (816 sq ft) is available for special projects or other circumstances as needed, or as an indoor movement room on days the gym is not available. The West doors and gym restrooms are fully ADA accessible. The access doors to the courtyard from both the gym and classrooms have a small curb which can be made handicap accessible with the addition of ramps.

To uphold the separation of church and state, the following are conditions of the lease agreement:

- Lessee shall have exclusive use of West doors.
- Lessee shall maintain appropriate signs outside and inside the facility which clearly distinguish the charter school as a separate entity from the Parish.
- Lessor shall ensure the area of the facility used by the school to which pupils have regular access does not contain religious symbols, posted religious messages, pictures, books or writings which indicate a preference for religious beliefs.
- During the school day, there are no visible or audible religious activities ongoing at the facility that convey a message of endorsement by the school of any religion.
- If employees, volunteers, clergy, or visitors of the Parish are required to access leased school space during the school day, such access should be minimal and non-disruptive to the school activities.
- Church offices are located behind a set of double doors and any church-related meetings/classes are held in other rooms
- The school does not "partner" with the church but instead will be tenants only. e.g., no shared community events, no cross-advertising of special events, etc.

- The Parish exercises no control over what is taught and generally how the school's program is operated.

9.06 Describe the transportation arrangements made for the charter school students:

ACS intends to offer transportation by contracted bus service to and from ACS to all students as needed.

9.07 Describe how food services will be provided for students:

In order to align with the 4 pillars of the school, and after much consideration and consultation with food service directors throughout Wisconsin, it is intended that Arbor Community School will **not** participate in the National School Lunch Program. However, students of ACS will receive assistance at the same level as provided by NSLP. That is, families will complete the same forms as are used to determine NSLP status (free or reduced pricing for breakfast and lunch), and ACS will subsidize these meals at the same rate as the NSLP. We anticipate a free and reduced meal rate of about 50%, the same as MMSD's average. Every child will be welcome to eat breakfast upon arrival at school. This arrangement helps to eliminate any embarrassment or shame families or children may feel who participate in the breakfast program. When everyone eats together, community is built.

The school will develop and implement a plan to integrate organic foods, or foods produced with minimal pesticide use, into the meals served to students. Meals will be designed to feature fresh and minimally processed fruits and vegetables, from local sources, to the greatest extent possible. Nutrition education will be provided through experiential activities involving the school garden, farm visits, and other agriculture-based activities.

Further, Arbor Community School governance board will develop and uphold a wellness policy for the school, including the following 5 measures:

1. Goals for nutrition education, physical activity and other school based activities that promote student wellness such as farm to school programs and gardening and cooking demonstrations.
2. Nutrition guidelines to promote student health and wellness, including guidelines that increase children's consumption of fruits and vegetables, whole grains, and other healthy foods.

3. Involvement of families, students, members of the community, and food professionals such as farmers, master gardeners, and chefs in development, implementation and periodic review of the wellness policy
4. Communication of wellness policy to families, students, and others in the community.
5. Evaluation of the effectiveness of the wellness policy.

9.08 Provide revenue and expenditure budgets for the first three years of operation:

See attached budgets for revenue and expenditures.

9.09 Provide a projected cash flow statement for the planning stage and the first year of operation:

See attached.

9.10 Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation:

Cash flow is sufficient for program operation as long as the school grows incrementally, as planned, from 40 to 90 students. However, there is considerable flexibility in multi-age classrooms to absorb additional enrollment and so ACS may have the financial means to grow more quickly.

9.11 Show how the budget addresses the unique aspects of the school:

The budget honors each pillar of ACS:

Community Teachers are provided autonomy to cooperatively run the day-to-day and strategic operations of the school, without oversight by an administrator. Teachers will develop a professional learning community and be allocated a budget for their own professional development and supplies. Leasing a van gives students the ability to venture out in the community as needed. Allocating budget for community outreach honors the time required to develop and foster relationships. Budgeting for stipends allows for ACS to honor community contributions to the educational program.

Equity The budget reflects a commitment to equity by allocating funding for student supports and services to reduce gaps in student achievement.

Nature Renting space within walking distance to several natural areas and food and botanical gardens provides access to nature-based and environmental education.

Wellbeing A substantial portion of the budget is allocated toward purchasing healthy food and preparing it in a nutritious way. Additionally, the vast majority of the professional development budget is devoted to trainings that further the mental and physical wellbeing of students and staff.

9.12 Describe the plan for annually auditing the school's finances and identify the firm which will conduct the audit (if selected) (118.40(1M)(B)11):

Arbor Community School will contract with an independent auditor who will be retained to perform an audit. Within 120 days of the end of the each fiscal year, the school shall ensure OEO receives an audit report including audited financial statements, the auditor's management letters and any exceptions noted by the auditors, and a statement as to whether the auditor does or does not have substantial doubt as to the school's sustainability.

9.13 Present a plan for raising funds needed beyond the per-pupil allocation provided under state law:

Arbor Community School has planned a budget that does not require additional funding beyond the state per-pupil aid assuming the projected enrollment and staffing. However, to ensure the success of the program, and to fully develop the educational model, ACS has received a \$700K DPI Planning and Implementation grant to cover one-time start-up costs for the 5-year period 2018-2019 (the planning year) through the first 4 years of operation to 2022-2023, including teacher stipends for planning, administrative services, classroom materials, food service staff, and a van for providing transportation. Furthermore, ACS is in the process of applying for will apply for 501(c)(3) status and will continue to identify sustaining funding streams and submit Letters of Intent to foundations that support well-being, educational innovation, and environmental education, such as the Bill & Melinda Gates Foundation, The Chan-Zuckerberg Foundation, Robert Wood Johnson Foundation, and Carnegie Foundation for the Advancement of Teaching. These global and national organizations are preferred because their funding streams are consistent, impactful, and because the founders of ACS are aware of no less than 4 simultaneous capital campaigns that the Madison community will be tapped to support over the course

of the next 3 years, all in the areas of pre-school and elementary education (not including ACS).

10.00 LEGAL REQUIREMENTS AND PROCEDURES

10.01 List the legal requirements for operating a public charter school:

The legal requirements for operating a public charter school that is an instrumentality of a school district are clearly established and fairly straightforward. The legal requirements for operating an independent (2r or 2x) public charter school which is not an instrumentality of a school district are vast. In fact, the ruling in **Racine Charter One, Inc. v. Racine Unified Sch. Dist.**, 424 F.3d 677, 680 (7th Cir.2005) suggests that 2r charter schools are not just independent public schools, but also independent public school districts, citing the definition of a school district in Wis. Stat. § 115.01(3) as “the territorial unit for school administration”.

Following are some of the current legal requirements for operating a public charter school:

- Title VI of the Civil Rights Act of 1964, 42 U.S.C. §§ 2000d-2000d-7;
- Title IX of the Education Amendments of 1972, 20 U.S.C. § 1681 et seq.;
- Age Discrimination Act of 1985, 42 U.S.C. § 6101 et seq.;
- Section 504 of the Rehabilitation Act of 1974, 29 U.S.C. § 794, and the Americans with Disabilities Act, 42 U.S.C. §§ 12101-12213;
- Individuals with Disabilities Education Act, 20 U.S.C. § 1400-1485 et seq.;
- Family Education and Privacy Rights Act, 20 U.S.C. § 1232(g) and Wis. Stat. § 118.125 Pupil Records;
- Drug-Free Workplace Act, 41 U.S.C. § 701 et seq.;
- Asbestos Hazard Emergency Response Act, 15 U.S.C. §§ 2641-2655;
- Every Student Succeeds Act, Pub.L. 114-95;
- Wis. Stat. § 48.981 Abused or Neglected Children;
- Wis. Stat. § 118.07-118.10, 118.25, 118.29 Health and safety requirements
- Wis. Stat. § 118.15 and § 118.16 School attendance
- Wis. Stat. § 118.19-118.23 Teacher licensure, contracts
- Wis. Stat. § 118.30 Assessment
- Wis. Stat. § 118.305, 118.31 and 118.32 treatment of students
- Wis. Stat. § 118.40 (2x) OEO charter schools
- Wis. Stat. § 115.415 Educator Effectiveness

10.02 Describe the policies and procedures developed to address these requirements:

Any ACS staff filling an administrative role will receive initial and ongoing professional development for school operations and to ensure compliance and sustainability of the school. The governance board will track documentation of this condition being met and ensure on-going compliance with the law. Policies are under development and are brought to the governance board on a rolling basis for approval. Additionally, an operations manual containing procedures for each relevant policy is being developed.

10.03 Describe the level and types of insurance coverage the board will provide:
Coverage Type Minimum Limit

A. Commercial General Liability

- Each Occurrence Limit \$1,000,000
- Personal & Advertising \$1,000,000 General Aggregate \$2,000,000
- Medical Expense \$5,000
- Damages to Rented Premises minimum will be set in accordance with pending contract with Aldo Leopold Nature Center (at least \$500,000)

B. Auto Liability

- Combined Single Limit \$1,000,000 each accident

C. Umbrella (providing excess employer's liability, general liability and auto liability coverage)

- Each Occurrence Limit \$5,000,000
- General Aggregate Limit \$5,000,000

D. Worker's Compensation

- Each Accident \$100,000
- Disease – Each Employee \$100,000;
- Disease – Policy Limit \$500,000

E. School Leader's Errors & Omissions/Educator's Legal Liability

- Aggregate Limit \$2,000,000

F. Crime Coverage

- Limit per Loss \$500,000

10.04 Explain the school's student records plan for developing and maintaining student achievement, health, emergency contact, high school credit, activities, and the like:

Arbor Community School will select a secure, accessible, comprehensive, and flexible

administration and school information management solution for maintaining student records (see section 8.05).

10.05 Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create:

Before the first day of operations, ACS will produce a handbook of policies and procedures for employees, and another handbook for students & families that will be made readily available to ensure their understanding of their rights and responsibilities. This will be made available in multiple languages, as necessary. Additionally, it is the intention of ACS founders that, once developed and in the “maturing” phase, the school model be able to be replicated by other organizations. To the extent this includes policy development, it is intended that ACS staff share best practices for governance and compliance for charter schools at events like the National Conference on Innovation in Education hosted annually by ISN.



Corporations Bureau

Form 102-Nonstock Corporation Articles of Incorporation

Name of Corporation

Name of Corporation: Arbor Community School, Inc.

Principal Office

Mailing Address: 5208 McKenna Road

City: Monona

State: WI

Zip Code: 53716

Registered Agent

Registered Agent Individual: Lynn Munsinger Brown

Name of Entity:

Street Address: 5208 McKenna Road

City: Monona

State: WI

Zip Code: 53716

Select Statement

Select one statement: The corporation will have members

Is this corporation authorized to make distributions under the statute?: Yes

This document was drafted by: Lynn Munsinger Brown

Incorporator

Name: Lynn Munsinger Brown

Street Address: 5208 McKenna Road

City: Monona

State: WI

Zip Code: 53716

Name: Melissa Rosenkranz

Street Address: 1854 Jenifer Street

City: Madison

State: WI

Zip Code: 53704

Incorporator Signature

I understand that checking this box constitutes a legal signature: Yes

Incorporator Signature:

Lynn Munsinger Brown

Optional Articles

The purpose(s) for which the corporation is incorporated:

Delayed Effective date:

Directors

Optional Contact Information

Name: Lynn Munsinger Brown

Address: 5208 McKenna Road

City: Monona

State: WI

Zip Code: 53716

Phone Number: 6085569682

Email Address: lmunsing@gmail.com

Endorsement

FILED

Received Date: 02/01/2018

**CONSENT RESOLUTIONS OF THE
INCORPORATORS OF THE ARBOR COMMUNITY SCHOOL, INC.**

The undersigned, being all of the Initial Incorporators of Arbor Community School, Inc., ("corporation") hereby consent to the adoption of and adopt the following resolutions pursuant to Wis. Stat. § 181.0205, without a meeting.

1. The initial directors of the corporation's Board of Directors are elected as follows:

Melissa Rosenkranz, 1854 Jenifer Street, Madison, WI 53704,
melissarosenkranz@gmail.com

Dadit Hidayat, 404 N. Segoe Rd. Apt 64A, Madison, WI 53705,
dadit.hidayat@wisc.edu

Rhoda McKinney, 4574 American Way, Cottage Grove, WI 53527
Rhoda4education@gmail.com

Bryn Orum, 5614 Montadale St, Fitchburg, WI 53711
brynorum@gmail.com

Wanda McCann Smith, 5666 King James Court Apt 4, Fitchburg, WI 53719
wandamccannsmith@yahoo.com

Venus Washington, 2526 S. Stoughton Rd Madison, WI 53716
mswashington71@gmail.com

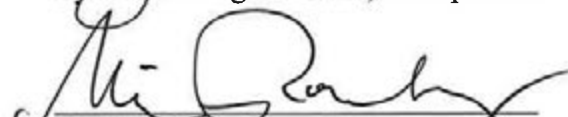
2. The Officers of the corporation are elected as follows:

President	Melissa Rosenkranz
Vice President	Dadit Hidayat
Secretary	Rhoda McKinney
Treasurer	Bryn Orum

3. The attached Bylaws of the corporation are adopted and shall be entered into the corporation's minute book.

Dated this 27th day of November, 2018.


Lynn Munsinger Brown, Incorporator


Melissa Rosenkranz, Incorporator

BYLAWS
of
GOVERNANCE BOARD OF THE ARBOR COMMUNITY SCHOOL, INC.

ARTICLE I
NAME, LOCATION, and PURPOSE

1.1. Name. The name of this Corporation shall be Arbor Community School, Inc. ("ACS").

1.2. Office. ACS shall have such principal office as may be determined by the Governance Board. The principal office is currently located at 5208 McKenna Road, Monona, WI 53716.

1.3. Purpose. ACS is created and shall be operated exclusively for the purposes set forth in the Articles of Incorporation, and to fulfill the mission and vision of ACS. ACS shall at all times shall operate consistent with the requirements of 501(c)(3) of the Internal Revenue Code of 1986 (the "Code").

ACS is created by contract ("Charter Contract") with the University of Wisconsin, Office of Educational Opportunity, pursuant to section 118.40(2x), of the Wisconsin Statutes. Nothing herein shall be construed contrary to that law or the Charter Contract.

ARTICLE II
GOVERNANCE BOARD

2.1. General Powers. The affairs of ACS shall be managed by the Governance Board ("Board"). The Board shall have supervision, control, and direction of the affairs of ACS, shall determine its policies or changes therein within the limits of these By-Laws, shall actively prosecute their purposes, and shall have discretion in the disbursement of their funds. The Board may adopt such rules and regulations for the conduct of its business as shall be deemed advisable, and may, in the execution of the powers granted, appoint such agents as it may consider necessary.

2.2. Number, Types and Terms of Office of Directors. The Governance Board will strive to maintain a diverse and inclusive board that represents the greater Madison community. No member of the Board shall be an employee or officer of the University of Wisconsin System. Further, no more than a minority of the Board's members may be employees of ACS.

- (a) Number and Qualifications of Directors. The Board shall consist of no fewer than five and no more than nine Directors, as determined from time to time by resolution of the Board. The Directors shall consist of persons who support the purpose of ACS, such as parents, education innovation experts, and members of the community. Other qualifications for Directors and criteria for the selection process may be established from time to time by the Board.

- (b) Election of Directors. Directors shall be elected by a majority vote of all Directors then in office.
- (c) Term. A Director shall serve a term of two (2) years or until such Director's successor is appointed and qualified. No Director may serve for more than two (2) consecutive terms. After an absence of one (1) year from the Board, an individual shall become eligible again for election to the Board. Partial terms do not count as a full term. Founding directors (members of the board during the planning year) may serve a partial term from the date of this agreement to the annual meeting.

2.3 Resignation/Removal/Vacancy. A resignation by a Director must be in writing and is effective when received by the President or Secretary. A Director who fails to participate in three (3) consecutive meetings of the Board will be presumed to have resigned from the Board. Any Director may be removed from the Board for any reason by a vote of two-thirds (2/3) of all Directors then in office. When vacancies occur on the Board, a replacement Director shall be named by the Board and shall serve until the next Annual Meeting or, if no replacement is named, the number of Directors shall be reduced by such vacancies until the next Annual Meeting.

2.4 Annual Meeting. The annual meeting of Board shall be held in the third quarter of each year on such day and at such place and time as determined by the President (the "Annual Meeting"). The purposes of the Annual Meeting are to inform parents and community members of issues of concern to the corporation, solicit member input on issues, elect Directors and Officers, and transact such other business as may come before the Board.

2.5 Regular and Special Meetings. Regular meetings of the Board shall be held at such times as the Board may designate, at such place as the Board may designate. Special meetings of the Board may be called by the President or by three (3) or more Directors at such time and place as the President or Directors calling the meeting may specify and in accordance with the notice requirements of Section 2.11. The board shall meet a minimum of nine (9) times per academic year.

2.6 Quorum. To establish a quorum of the Board, half plus one of all the Directors then in office must be present.

2.7 Manner of Acting. Except where otherwise provided by law or these Bylaws, the act of a simple majority of the Directors present at a meeting with a quorum is the act of the Board. For those actions of the Board requiring more than a majority vote of the quorum, the number of Directors required to take that action must be present at the meeting.

2.8 Compensation. Directors will not be paid compensation for their services as Directors, provided that nothing in these Bylaws will be construed to prohibit payment of compensation to an individual who serves as a Director for services rendered to ACS in another capacity or reimbursement of expenses related to undertaking ACS's business.

2.9 Agenda. In order to be included in the agenda for a given meeting any agenda items must be provided to the President seven (7) days prior to the date of the meeting. The President will distribute the agenda to the Directors five (5) days prior to the meeting.

2.10 Procedure. Meetings shall follow the procedures contained in Roberts Rules of Order Newly Revised in Brief and all applicable provisions of the Open Meetings Law.

2.11 Notice. Notice of meetings may be given to Directors by email. Special meetings must be preceded by at least forty-eight (48) hours-notice to each. Notice need not be given of regular meetings of the Board, except a regular meeting at which the Bylaws or Articles of Incorporation are amended or repealed or the removal of a Director is to be considered requires seven (7) days advance written notice by email. Written notice shall be deemed given at the time it is received.

2.12 Director Conflict of Interest. The Board shall comply with the Conflict of Interest Policy that is attached as Exhibit A, as amended from time to time. Each Director shall sign the Conflict of Interest Policy annually as evidence that he or she has no conflicts or that any conflicts that may interfere with his or her duties as a Board member have been disclosed.

ARTICLE III OFFICERS

3.1 Officers. The officers of the Board are a President, Vice-President, Secretary, and Treasurer (the "Officers"). Officers shall be selected from among the Directors. The Board may elect or appoint such other Officers as it shall deem necessary and such Officers shall have authority to perform the duties prescribed from time to time by the Board.

3.2 Election. At the Annual Meeting, a nominating committee of no more than three (3) members appointed by the President, shall present a slate of three (3) individuals to be approved as Officers of the Board. Each Officer shall hold office until such Officer's successor shall have been duly elected and qualified, or until such Officer's death, resignation or removal. Election or appointment as an Officer shall not of itself create contract rights.

3.3 Term of Office and Removal. Officers shall be elected for a one-year (1) term. Officers may be re-elected for a maximum of three (3) terms. Elected Officers may be removed without cause upon the approval of two-thirds (2/3) of all of the Directors.

3.4 President of the Board. The President of the Board shall preside at all meetings of the Board and shall perform such other duties as may be assigned by the Board from time to time. Unless otherwise stated in Board policies, the President may sign and execute, in the name of the Board, any instrument or document consistent with the foregoing general delegation of authority or any other instrument or document specifically authorized by the Board. The President shall, whenever it may in the President's opinion be necessary, prescribe the duties of other Officers of the Board, in a manner not inconsistent with the provisions of these Bylaws and the directions of the Board of Directors.

3.5 Vice-President. If the Board elects a Vice-President, he or she will have such duties as determined from time to time by the Board of Directors. The Vice-President will assist the President in the performance of his or her duties as the President directs and will discharge the duties of the President in the event of his or her absence or inability to act.

3.6 Secretary. The Secretary shall sign documents in the name of the Board from time to time as required by Board policies, and shall see that minutes of the meetings of the Board are taken and maintained; see that notices are duly given in accordance with the provisions of these Bylaws or as required by law and be custodian of the corporate records. The Secretary shall perform such other duties as may be assigned to the Secretary by the Board.

3.7 Treasurer. The Treasurer shall sign documents in the name of the Board from time to time as required by Board policies, and shall see that an adequate and accurate accounting system is maintained and that financial reports are presented to the Board. The Treasurer shall advise the Board on the handling of ACS's monies and investments and perform such additional duties as may be assigned to the Treasurer by the Board.

ARTICLE IV COMMITTEES OF THE BOARD OF DIRECTORS

4.1 Standing Committees. The Board shall have a Diversity & Equity Committee, a Finance Committee, and a Curriculum and Instruction Committee, and such other standing committees as determined by resolution of the Board.

a. Standing committees shall be comprised of at least three (3) Board members and also include volunteers or staff as determined by the Board.

c. Standing committees will have delegated authority as specified in Board policy for each standing committee. Responsibilities of a standing committee can be modified at any time at the discretion of the Board.

d. The President of the Board shall designate one Director to serve as the Chair of each standing committee. Committee Chairs shall be responsible for recruiting and training volunteers and staff selected to fulfill committee responsibilities.

ARTICLE V CONTRACTS, CHECKS, DEPOSITS AND FUNDS

5.1. Contracts. The President of the Board may enter into any contract or execute and deliver any instrument in the name of and on behalf of the Board. The Board may authorize any other Officer or Officers, agent or agents of the Board, in addition to the Officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Board, subject to Board policy. Such authority may be general or confined to specific instances.

5.2. Checks, Drafts, Etc. All checks, drafts or orders for the payment of money, notes or other evidences of indebtedness issued in the name of ACS, shall be signed by the President and such Officer(s) or agent(s) of ACS as set forth in Board policies.

5.3. Deposits. All funds of ACS shall be deposited from time to time to the credit of the accounts of ACS in such banks, trust companies or other depositaries as the Board designates.

5.4. Books and Accounts. ACS shall keep or cause to be kept correct and complete books and records of account and also keep minutes of the proceedings of the Board and its committees. In addition, ACS shall cause to be filed the necessary reports, tax returns or other documents as may be required by law on its own behalf.

ARTICLE VI INDEMNIFICATION

ACS shall, to the fullest extent authorized by Chapter 181, Wis. Stats., indemnify each Director and Officer of the Board against reasonable expenses and against liability incurred by a Director or Officer in a proceeding in which he or she was a party because he or she was a Director or Officer of the Board. These indemnification rights shall not be deemed to exclude any other rights to which the Director or Officer may otherwise be entitled. ACS shall indemnify any employee who is not a Director or Officer of the Board, to the extent the employee has been successful on the merits or otherwise in defense of a proceeding, for all reasonable expenses incurred in the proceeding if the employee was a party because he or she was an employee of ACS. ACS may, to the fullest extent authorized by Chapter 181, Wis. Stats., indemnify, reimburse, or advance expenses of Directors, Officers, or employees.

ARTICLE VII FISCAL YEAR AND TERM YEAR

The fiscal year of ACS is July 1 – June 30. The terms of the Board's Officers and Directors shall be one year from the date of the annual meeting, unless otherwise determined by the Board.

ARTICLE VIII AMENDMENTS TO THE BYLAWS

These Bylaws may be amended or repealed and new Bylaws may be adopted only with the approval of two-thirds (2/3) of all Board members and with at least seven (7) days-notice.

ARTICLE IX DISSOLUTION

ACS shall be dissolved or subject to merger or any other form of corporate restructuring upon the approval of two-thirds (2/3) of all Board members. Upon dissolution, the assets shall be distributed in accordance with ACS's Articles of Incorporation and in compliance with the Charter Contract.

Adopted by Consent Resolution of the Incorporators of the Arbor Community School, Inc., Lynn Munsinger Brown and Melissa Rosenkranz, on November 27, 2018 pursuant to Wis. Stat. § 181.0205.

**RESOLUTIONS OF THE
ARBOR COMMUNITY SCHOOL, INC.**

WHEREAS, the Board of Directors of Arbor Community School, Inc., (“corporation”), wish to complete the organization of the corporation for the purpose of developing and operating the Arbor Community School.

THEREFORE, be it resolved by the Board of Directors that the following are approved:

1. The actions of the incorporators in executing and causing to be duly filed and recorded the Articles of Incorporation of this corporation, are hereby ratified, approved and confirmed, and Lynn Munsinger Brown and Melissa Rosenkranz are hereby relieved of any further duties as incorporators.

2. The Restated and Amended Articles of Incorporation attached hereto as Exhibit B are approved and shall be filed with the Wisconsin Department of Financial Institutions and entered in the minute book.

3. The corporation shall pay any and all legal and other expenses incurred in connection with its incorporation and its organization.

4. The President is hereby authorized on behalf of the corporation to open such bank account or accounts as the President may deem necessary or advisable; the authorized signers of checks or withdrawal orders in connection with any such accounts shall be the person whose name and signature shall have been certified to such bank to be the Treasurer of the corporation and any such bank shall be fully protected in relying on any such certification until it shall receive written notice of change in such office or in such signing authority. If such depository bank shall require a depository resolution in any form different from, but generally consistent with, the foregoing, such other depository resolution shall be deemed to have been duly approved and adopted hereby, and may be so certified by the Secretary, whenever approved by the Secretary and copy thereof has been inserted in the minute book.

5. The President is authorized to apply for tax-exempt status of the corporation with the Internal Revenue Service under § 501(c)(3) of the Internal Revenue Code, and the President shall implement and adopt such additional accounting and tax reporting procedures, methods and conventions as she shall deem appropriate for use by the corporation.

6. The President is hereby authorized to conduct the business of the corporation on a day-to-day basis and may enter into contracts on behalf of the corporation in that regard.

7. The President is authorized to work with the Grant Coordinator, Lynn Munsinger Brown, to develop the Arbor Community School. This work shall include but is not limited to, curriculum development, staff hiring, executing a charter contract with the University of Wisconsin, Office of Educational Opportunity, applying for grants, executing leases and other contracts necessary to operate Arbor Community School, and applying for tax-exempt status of the corporation with the Internal Revenue Service under § 501(c)(3) of the Internal Revenue Code.

8. The Conflict of Interest Policy attached hereto as Exhibit A is hereby adopted and approved.


9. The Officers are hereby authorized to do all acts and things necessary and appropriate to commence and operate the affairs of the corporation, and any and all acts of the Officers, including the formation and execution of any contracts on the corporation's behalf, are hereby fully ratified and confirmed.

Adopted this 27th day of November, 2018.

A handwritten signature in black ink, appearing to read "Mike Brown", written over a horizontal line.

President, Arbor Community School, Inc.

ATTEST:

A handwritten signature in black ink, appearing to read "Rha Zin", written over a horizontal line.

Secretary, Arbor Community School, Inc.

EXHIBIT A

Conflict of Interest Policy

Article I **Purpose**

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (Organization) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II **Definitions**

1. Interested Person

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction on or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Article III **Procedures**

1. Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflicts of Interest Policy

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines

the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article IV

Records of Proceedings

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V

Compensation

- a. A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI

Annual Statements

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and

d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article VII

Periodic Reviews

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Article VIII

Use of Outside Experts

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

B

**RESTATED AND AMENDED NON-STOCK ARTICLES OF INCORPORATION
OF
ARBOR COMMUNITY SCHOOL, INC.**

Executed by the undersigned for the purpose of forming a Wisconsin corporation under Chapter 181 of the Wisconsin Statutes, WITHOUT STOCK AND NOT FOR PROFIT.

Article I: The name of the corporation is ARBOR COMMUNITY SCHOOL, Inc.

Article II: The period of existence shall be perpetual.

Article III: The purposes of the corporation shall be educational and specifically to operate the Arbor Community School, a Wisconsin public charter school.

Article IV: No part of the net income of the corporation shall inure to the benefit of or be distributable to any private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services actually rendered and to make payments and distributions in furtherance of the purposes and objectives set forth in Article III hereof. No substantial part of the activities of the corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation, and the corporation shall not participate in or intervene in any political campaign on behalf of any candidate for public office.

Article V: The principal office of the corporation is located in Dane County, Wisconsin. The address of such principal office is 5208 McKenna Road, Monona Wisconsin, 53716.

Article VI: The name of the initial registered agent is Lynn Munsinger Brown, and the address of the initial registered agent is 5208 McKenna Road, Monona Wisconsin, 53716.

Article VII: These Articles may be amended in the manner authorized by the bylaws.

Article VIII: The manner of election or appointment of directors and the number and qualifications of directors shall be fixed by bylaw but shall be not less than three (3).

Article IX: The corporation shall not have members. These restated and amended articles were adopted by the Board of Directors of the corporation prior to the existence of any members.

Article X: The corporation is organized exclusively for charitable, educational, religious or scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code (or the corresponding provision of any future United States Internal Revenue law).

Article XI: Notwithstanding any other provisions of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal Income Tax under section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue Law) or (b) by a corporation, contributions, to which are deductible under section 170(c)(2) of the

Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue Law).

Article XII: Upon dissolution of the corporation, the board of directors shall, after paying or making provisions for the payment of all the liabilities of the corporation, dispose of all the assets of the corporation exclusively for the purposes of the corporation in such manner or to such organization or organizations organized and operated exclusively for charitable, educational, religious or scientific purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue law) or to any political subdivision or subdivisions of the State of Wisconsin, as the board of directors shall determine.

Article XIII: The name and address of the incorporators are:

Lynn Munsinger Brown
5208 McKenna Road
Monona, WI 53716

Melissa Rosenkrantz
5208 McKenna Road
Monona, WI 53716

Executed this 27 day of November, 2018.


Melissa Rosenkrantz President

THIS DOCUMENT DRAFTED BY AND

SHOULD BE RETURNED TO:
Attorney M. Tess O'Brien-Heinzen
Boardman & Clark LLP
P.O. Box 927
Madison, WI 53701-0927
(608) 257-9521

Arbor Community School Budget 2018-2022

	Planning Year 2018-2019	Year 1 2019-2020	Year 2 2020-2021	Year 3 2021-2022
Per student multiplier ¹		8,500	8,500	8,500
Enrollment		40	50	60
Revenue				
State Aid - General		340,000	425,000	510,000
Fundraising	2,000			
IDEA funding (@10% of enrollment)		4,600	5,750	6,900
DPI Grant	150,000	169,125	123,550	128,750
Total Revenue	152,000	513,725	554,300	645,650
Expenditures				
Instructional Expenditures	FTE	FTE	FTE	FTE
Classroom Teacher		2.0 90,000	3.0 137,700	3.0 140,454
Educational Assistant ²		1.0 40,000	1.0 40,800	1.0 41,616
Student Services				0.5 23,409
Extended contracts	18,000	3.0 48,500	4.0 43,500	4.5 43,500
FICA & Medicare		14,875	18,743	21,035
Fringe Benefits		52,000	71,400	72,828
Coaches & Consultants	46,500	34,700	32,000	31,000
Project & Partnership Coordinator	53,000	15,000	15,000	
Professional Development	16,150	13,525	12,000	12,450
Purchased Services (Payroll, Legal)	10,350	25,000	29,100	29,500
Rent		36,000	45,000	54,000
Insurance	2,000	13,500	15,500	18,000
Contracted Transportation		10,000	10,000	10,000
Equipment (incl vans)	5,000	43,400	8,200	33,500
Supplies & Materials	1,000	21,000	16,000	16,300
Meal Program sub-budget				
Nutrition Staff (incl tax)		0.5 24,413	0.5 24,901	0.5 25,399
Meal revenue		(12,204)	(15,255)	(18,306)
Food & Supplies		31,600	39,500	47,400
Total cost	152,000	501,309	544,089	43,565
Net Revenue	0.00	12,416	10,211	3,451.00

¹ Same state aid amount used year over year; projected to increase

² Combined with student services first 3 years

Arbor Community School 2018-2020
Statement of Cash Flows

Operations		2018-2019	2019-2020
Revenue from			
	State Aid - General		\$340,000
	Fundraising	\$2,000	
	IDEA funding		4,600
	DPI Grant	150,000	169,125
	Meal Plan		12,204
Cash paid for			
	Rent		(36,000)
	Equipment, furniture and fixtures	(5,000)	(18,400)
	Services	(10,350)	(25,000)
	Supplies & Materials	(1,000)	(21,000)
	Food		(31,600)
	Contracted consultants	(99,500)	(49,700)
	Salary & Wages	(18,000)	(269,788)
	Professional Development	(16,150)	(13,525)
	Insurance	(2,000)	(13,500)
	Contracted transportation		(10,000)
Net Cash Flow from Operations		0	\$26,631
Investing Activities			
Cash paid for			
	Lease or purchase van		(25,000)
Net Cash Flow from Investing Activities		0	(25,000)
Net Cash Flow		\$0	\$12,416

PHASE II APPLICATION - REVIEWERS GUIDE

Please consider the major elements of the proposal as outlined below.

Please evaluate the Phase II application as to how well the applicant has responded in a meaningful and informative manner about how they would operate their proposed charter school.

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, reliance is placed on each reviewer's summary judgment of the elements and overall final recommendation.

Please use the following statements to frame your final recommendation:

1. Acceptable and should be considered for potential charter status.
2. Not Acceptable and should not be considered for charter status.
3. Application has potential but additional information is needed. (Note: Reviewer must specify the areas of concern. This can include information needed for clarification, suggested revisions, and information that might make the application more complete.)

Please consider the entire proposal and avoid focusing on one aspect of the proposal in making a final recommendation.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using this rubric.
2. Each reviewer will complete their individual review, accompanying comments and final recommendation and submit this completed rubric to the Office of Educational Opportunity. If a simple majority of the committee rejects the proposal then no further action will be taken with the applicants. However, if a simple majority recommends accepting the proposal, then the OEO director will review the review materials (including comments from the committee about its strengths/weaknesses) and determine if the recommendation will be accepted. In cases where additional information is requested by the committee, the Director shall secure the requested information for the Evaluation Committee prior to a final recommendation to the OEO.
3. If a majority of the Evaluation Committee makes a favorable recommendation and the Director accepts the recommendation, the Director shall make a summary recommendation to the System President. The President shall be informed, in a summary fashion, about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation of the committee, the Evaluation Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.

Phase II Rubric

Name of Proposed School:	Arbor Community School
Proposed Location of School: (What municipality?)	2438 Atwood Avenue Madison , WI 53704
Date:	1-25-19
Name and Title of Reviewer:	

Final Recommendation (complete this section last by electronically highlighting your recommendation)

- ☒ **Accept for authorization**
- ☐ **Deny**
- ☐ **Resubmit with modifications for further consideration**

Please use this rubric to guide your assessment of the Phase II application.

The last page provides space to provide your summary assessment of the application and provide evidence to support your assessment. Please complete the last page in addition to providing your final recommendation in the box above.

Each section presents criteria for a response that meets the application requirement; these criteria should guide the overall rating for the section.

The Strengths and Concerns boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided. Please provide your assessment of the strengths and concerns, if any, for each section.

The following definitions should guide the ratings:

Meets the Standard:

The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:

The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:

The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice.

1. School Design Key Questions

The school must have a clear mission and an overall purpose for the educational program that meets the needs of students.

Does the application satisfy this standard? Is the design of the school grounded in research? Does it have unique aspects that will bring a new educational offering to the students?

Evaluation Criteria: A response that meets the standard will:

1. Provide the name of the proposed charter school.
2. Provide the name(s), address(es), telephone number(s), and email address(es) of the organization or individuals submitting the application to create a charter school.
3. Identify how the school will operate as a legal entity under Wisconsin law.
4. Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class.
5. State the mission and vision of the school.
6. State the core beliefs of the school.
7. Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices
8. Note the unique aspects of the school and explain why the community needs this school.
9. Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.
10. Characterize the school culture desired for the school and how this culture will be established.
11. Describe the process that will be used to develop an initial strategic plan.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
x		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	I like the strength that staff will provide professional development to parents and community members on the democratic practices so that there is a continuation of the school culture in the home setting. I like the process of empowering student to resolve problems without the adult solving the problem for them. It allows for the students to communicate in the learning manner in which they choose best for them.
Concerns/Questions	

2. Governance and Leadership

For long-term development, the school will need an effective governance structure. Is there evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school? Are there clear lines of authority established in the governance structure and are parents allowed the opportunity to participate in governance at the school? Does this application suggest that potential issues of discrimination (disability, gender, and race) would be of concern?

Evaluation Criteria: A response that meets the standard will:

1. Identify the organization and individuals involved in the development of the school.
2. Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization.
3. Describe the board that will be created to lead the school.
4. Describe the process to be used for the selection of board members.
5. State the general duties of board members.
6. Explain how the governance of the school will embody principles of democratic management, including but not limited to family participation.
7. Explain how the board will establish policy and work with educators to promote the goals of the program.
8. Attach a copy of the by-laws of the board (if available).
9. Attach a copy of articles of incorporation as defined by Wisconsin law.
10. List the names and occupations of individuals who will serve on the initial school board (if available).
11. Explain how the school will operate in terms of lines of authority and responsibility.
12. Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided.
13. Identify the criteria to be employed in hiring the school director/principal.
14. If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Arbor Community School empowers all staff to conduct outreach to the community. The model allows all staff to be held responsible for reaching out to the community. The proof of outreach will include photos to the parental portal and staff is encourage to participate in one-on-one meetings with new families to accept the role of community outreach circle.
-----------	---

Concerns/Questions	Why not create a Parent Liaison or Outreach Liaison position? I am a bit concerned that staff will become overwhelmed with the social worker task or responsibilities?
--------------------	--

3. Community and Family Engagement

For any school to maintain long-term viability, it must have community involvement, be responsive to the community, and be in partnership with other community entities. Does the application satisfy this standard?

Evaluation Criteria: A response that meets the standard will:

1. Describe the community the school will serve.
2. Explain how the community has been involved in developing the school.
3. Explain how the community will be involved in the operation of the school.
4. Describe community partnerships the school will have or hopes to have.
5. Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built.
6. Describe how requirements, expectations, and preferences of students, families, and other stakeholders will be determined.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
x		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	The ACS board will annually survey families and teachers to access and monitor family engagement. I applaud the process of surveying your staff and teachers.
Concerns/Questions	Will ACS be working with an Evaluation Team to give the feedback from the survey? How are questions decided? How are you collecting the students voices in this process?

4. Marketing, Recruiting, and Admissions

For any school to recruit students, it must have a viable marketing and recruitment plan. Does the application satisfy this standard? By state law, charter schools are public schools that must be open to all students. Does the school have an appropriate plan to admit students without discrimination? Do the plans meet state and federal requirements?

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance amongst its pupils.
4. Describe admission policies and practices to be used to enroll students the first year and succeeding years.
5. Describe strategies to be employed when, and if, more students apply for admission than there are seats available.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Having majority racially minorities involved as directors are important to authentic diversity engagement. The community partnerships, organizations such as Kids Forward and United Way of Dane County or potential partnerships that include funding are critical to diverse students populations in the City of Madison.
Concerns/Questions	

5. Faculty and Staff

High-quality school programs are based on effective staff recruitment and ongoing staff development. Have the developers effectively addressed these concerns? Does the plan provide a mechanism to recruit licensed faculty members and obtain licensure for those members not immediately meeting the requirement?

Evaluation Criteria: A response that meets the standard will:

1. Identify how administration, faculty, and staff will be recruited and how the school will ensure the quality of the workforce.
2. Describe how job requirements, compensation, career progression, workforce practices, and work environment will motivate faculty and staff to achieve high performance.
3. Describe how the faculty and staff education and training programs will support the achievement of overall objectives.
4. Describe how the work environment will foster learning and continuous improvement for both staff and students.
5. Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Sending job listing on WECAN, and out of state outreach to Chicago, Minneapolis gives you another selection for applicants. It is a benefit to list jobs in multiple languages for engagement.
Concerns/Questions	Do you plan to partner with a College or University to create pathways for teachers?

6. Curriculum and Instruction

High-quality schools have an integrated model of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that meets the needs of students? Does the applicant cite research support for its curriculum? Is the mission reflected in the educational program?

Evaluation Criteria: A response that meets the standard will present a curriculum plan that:

1. Describes the educational program of the school.
2. Identifies the content of the instructional program.
3. Characterizes the instructional methodology to be utilized by the faculty.
4. Explains how chosen instructional content and methodology will achieve the school's objectives.
5. Describes the research that supports this approach to educating children.
6. Describes the program design, methods, and strategies for serving students with disabilities and for complying with all related federal laws and regulations.
7. Describes the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	I like the idea of allowing students to work on different projects that prevents others for noticing the student is receiving supportive services from Special Education. It is really important to provide an environment of normalcy for student who require special education services so that their peers do not stigmatize them.
Concerns/Questions	

7. Standards, Assessment, and Accountability

OEO authorized schools must meet standards of accountability. Have the applicants provided a model of accountability that will be generally accepted by the public and have they implemented the testing standards required by state law? Have the applicants described how these standards will be integrated into the instructional process to improve student performance?

Evaluation Criteria: A response that meets the standard will:

1. Describe the standards on which the educational program will be based.
2. Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined.
3. Describe the requirements for high school graduation (if applicable).
4. Define how the results of the educational program will be assessed.
5. Describe the student achievement goals that will be met during the first five years of operation.
6. Describe how the school will ensure the quality and availability of needed data and information.
7. Describe how standards, assessment, and accountability will be integrated into a coordinated system.
8. Describe how effective performance management systems will be provided to improve student and organizational performance.
9. Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard

Identify strengths or concerns. (Use as much space as needed.)

Strengths	The Educational program of ACA four pillars of Equity, Community, Well-being and Nature are relatable to program assessments. These four areas will demonstrate a students progress in learning.
Concerns/Questions	

8. Educational Support Processes

High-quality schools have an educational program that is a well-defined plan of operation, understood by educators, students and families alike. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the educational program? Can you identify standards for behavior and disciplinary practices to be used by the program? Does the plan describe a clear plan for meeting the broad spectrum of educational needs of special education students and dual language learners?

Evaluation Criteria: A response that meets the standard will:

1. Describe how key processes for design and delivery of the educational program will be managed.
2. Describe how instructional content and methodology will be continuously improved.
3. Explain the procedures for ensuring the health and safety of students.
4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
6. Identify key student services and how they will be managed.
7. Describe how key processes that support daily operations will be managed.
8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing.
9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
x		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Professional Goals and Learning Objectives will be developed jointly by the governance board and educators. The decision will be based on needs and makeup of incoming students and teacher identifying the four pillar goals, non-academic and academic objectives.
Concerns/Questions	

9. Business and Financial Operations

High-quality schools have solid fiscal plans and management strategies. Do the personnel have the expertise to properly manage the financial affairs of the school? Is the business plan suggested in the application realistic given the state per pupil allocation? Does the financial analysis appear to be realistic and have the developers given due consideration to all major elements of a business plan including marketing, student recruitment strategies, and fundraising strategies? Has the applicant identified a school building? Does the applicant have sufficient assets to lease/purchase and operate a site?

Evaluation Criteria: A response that meets the standard will:

1. Identify the individuals and their level of expertise who were involved in developing the schools financial plan.
2. Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school.
3. Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required.
4. Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation.
5. Provide a description of the school facility, or proposed facility, and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility.
6. Describe the transportation arrangements made for the charter school students.
7. Describe how food services will be provided for students.
8. Provide revenue and expenditure budgets for the first three years of operation.
9. Provide a projected cash flow statement for the planning stage and the first year of operation.
10. Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation.
11. Show how the budget addresses the unique aspects of the school.
12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).
13. Present a plan for raising funds needed beyond the per-pupil allocation provided under state law.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
x		

Identify strengths or concerns (use as much space as needed.)

Strengths	Students participating in nutrition education, physical activity, gardening/cooking demonstrations.
Concerns/Questions	When will you develop a Wellness Policy? I am a bit concerned that you have not developed a Wellness Model but yet have decided not to participate in the National School Lunch Program

	model of providing school lunches? What vendor or what person will provide a meals for the students? A bit concerned that that students will not participating in the NSLP lunch program?
--	---

10. Legal Requirements and Procedures

Schools authorized by OEO must be operated in accordance with all applicable federal and state charter school laws and requirements. Does the applicant understand the legal requirements and have the ability to operate within these requirements?

Evaluation Criteria: A response that meets the standard will:

1. List the legal requirements for operating a public charter school.
2. Describe the policies and procedures developed to address these requirements.
3. Describe the level and types of insurance coverage the board will provide.
4. Explain the school's student records plan for developing and maintaining student achievement, health, emergency contact, high school credit, activities, and the like.
5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
x		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Suggested Standing Committees listed are a good start and will include 3 volunteers.
Concerns/Questions	

SUMMARY ASSESSMENT

Please use your evaluation of the 10 criteria to make a decision regarding your overall assessment of the application below.

Electronically highlight your summary assessment

Approve: *Application is acceptable and should be considered for potential charter status.*

X Superior: This proposal is very well developed and can contribute to school reform efforts to improve the quality of education for children at risk and children living in the city. The program plan and evaluation components are outstanding and will add to our understanding of education.

- ☐ Satisfactory: The proposal is sufficiently well developed that granting of charter status for planning purposes is realistic.

Deny: *Application is not acceptable and should not be considered for charter status. Use the space below to indicate rationale.*

- ☐ Unsatisfactory: The proposal requires extensive work and the planning group needs to reevaluate its goals for the program. Working with a consultant may be advisable.
- ☐ Does not fit within University's charter expectations.
- ☐ The proposal is lacking in research to support the program design and may wish to seek a charter from an organization other than the University.

Rationale:

Revise: *Application has potential but additional information is required. Use the space provided to specify area in need of revisions.*

- ☐ Needs Work: The proposal lacks in completeness and should be returned for further work to be submitted at a later date for further consideration.

Revisions Needed:

PHASE II APPLICATION - REVIEWERS GUIDE

Please consider the major elements of the proposal as outlined below.

Please evaluate the Phase II application as to how well the applicant has responded in a meaningful and informative manner about how they would operate their proposed charter school.

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, reliance is placed on each reviewer's summary judgment of the elements and overall final recommendation.

Please use the following statements to frame your final recommendation:

1. Acceptable and should be considered for potential charter status.
2. Not Acceptable and should not be considered for charter status.
3. Application has potential but additional information is needed. (Note: Reviewer must specify the areas of concern. This can include information needed for clarification, suggested revisions, and information that might make the application more complete.)

Please consider the entire proposal and avoid focusing on one aspect of the proposal in making a final recommendation.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using this rubric.
2. Each reviewer will complete their individual review, accompanying comments and final recommendation and submit this completed rubric to the Office of Educational Opportunity. If a simple majority of the committee rejects the proposal then no further action will be taken with the applicants. However, if a simple majority recommends accepting the proposal, then the OEO director will review the review materials (including comments from the committee about its strengths/weaknesses) and determine if the recommendation will be accepted. In cases where additional information is requested by the committee, the Director shall secure the requested information for the Evaluation Committee prior to a final recommendation to the OEO.
3. If a majority of the Evaluation Committee makes a favorable recommendation and the Director accepts the recommendation, the Director shall make a summary recommendation to the System President. The President shall be informed, in a summary fashion, about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation of the committee, the Evaluation Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.

Phase II Rubric

Name of Proposed School:	Arbor Community School
Proposed Location of School: (What municipality?)	Madison
Date:	1/24/18
Name and Title of Reviewer:	

Final Recommendation (complete this section last by electronically highlighting your recommendation)

☒ **Accept for authorization**

☐ **Deny**

☐ **Resubmit with modifications for further consideration**

Please use this rubric to guide your assessment of the Phase II application.

The last page provides space to provide your summary assessment of the application and provide evidence to support your assessment. Please complete the last page in addition to providing your final recommendation in the box above.

Each section presents criteria for a response that meets the application requirement; these criteria should guide the overall rating for the section.

The Strengths and Concerns boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided. Please provide your assessment of the strengths and concerns, if any, for each section.

The following definitions should guide the ratings:

Meets the Standard:

The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:

The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:

The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice.

1. School Design Key Questions

The school must have a clear mission and an overall purpose for the educational program that meets the needs of students.

Does the application satisfy this standard? Is the design of the school grounded in research? Does it have unique aspects that will bring a new educational offering to the students?

Evaluation Criteria: A response that meets the standard will:

1. Provide the name of the proposed charter school.
2. Provide the name(s), address(es), telephone number(s), and email address(es) of the organization or individuals submitting the application to create a charter school.
3. Identify how the school will operate as a legal entity under Wisconsin law.
4. Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class.
5. State the mission and vision of the school.
6. State the core beliefs of the school.
7. Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices
8. Note the unique aspects of the school and explain why the community needs this school.
9. Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.
10. Characterize the school culture desired for the school and how this culture will be established.
11. Describe the process that will be used to develop an initial strategic plan.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Innovative mission and vision that has social-emotional priorities woven throughout school design
Concerns/Questions	Description of school culture is somewhat vague. I would like see more tangible evidence of how teachers and students will be acclimated to the democratic classroom and inquiry-based environment.

2. Governance and Leadership

For long-term development, the school will need an effective governance structure. Is there evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school? Are there clear lines of authority established in the governance structure and are parents allowed the opportunity to participate in governance at the school? Does this application suggest that potential issues of discrimination (disability, gender, and race) would be of concern?

Evaluation Criteria: A response that meets the standard will:

1. Identify the organization and individuals involved in the development of the school.
2. Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization.
3. Describe the board that will be created to lead the school.
4. Describe the process to be used for the selection of board members.
5. State the general duties of board members.
6. Explain how the governance of the school will embody principles of democratic management, including but not limited to family participation.
7. Explain how the board will establish policy and work with educators to promote the goals of the program.
8. Attach a copy of the by-laws of the board (if available).
9. Attach a copy of articles of incorporation as defined by Wisconsin law.
10. List the names and occupations of individuals who will serve on the initial school board (if available).
11. Explain how the school will operate in terms of lines of authority and responsibility.
12. Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided.
13. Identify the criteria to be employed in hiring the school director/principal.
14. If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Strong leadership and governance structure described that incorporates training
Concerns/Questions	

3. Community and Family Engagement

For any school to maintain long-term viability, it must have community involvement, be responsive to the community, and be in partnership with other community entities. Does the application satisfy this standard?

Evaluation Criteria: A response that meets the standard will:

1. Describe the community the school will serve.
2. Explain how the community has been involved in developing the school.
3. Explain how the community will be involved in the operation of the school.
4. Describe community partnerships the school will have or hopes to have.
5. Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built.
6. Describe how requirements, expectations, and preferences of students, families, and other stakeholders will be determined.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Diverse partnerships have already been established. There seems to be buy-in from the community it plans to serve.
Concerns/Questions	

4. Marketing, Recruiting, and Admissions

For any school to recruit students, it must have a viable marketing and recruitment plan. Does the application satisfy this standard? By state law, charter schools are public schools that must be open to all students. Does the school have an appropriate plan to admit students without discrimination? Do the plans meet state and federal requirements?

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance amongst its pupils.
4. Describe admission policies and practices to be used to enroll students the first year and succeeding years.
5. Describe strategies to be employed when, and if, more students apply for admission than there are seats available.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Evidence of strong efforts to build relationships and build connections in community. School seems to be welcomed by the community. Website is inviting and informational
Concerns/Questions	

5. Faculty and Staff

High-quality school programs are based on effective staff recruitment and ongoing staff development. Have the developers effectively addressed these concerns? Does the plan provide a mechanism to recruit licensed faculty members and obtain licensure for those members not immediately meeting the requirement?

Evaluation Criteria: A response that meets the standard will:

1. Identify how administration, faculty, and staff will be recruited and how the school will ensure the quality of the workforce.
2. Describe how job requirements, compensation, career progression, workforce practices, and work environment will motivate faculty and staff to achieve high performance.
3. Describe how the faculty and staff education and training programs will support the achievement of overall objectives.
4. Describe how the work environment will foster learning and continuous improvement for both staff and students.
5. Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Professional Development aligns with curriculum and mission of school.
Concerns/Questions	Proposal doesn't fully describe how teachers will receive systematic feedback on the effectiveness of instructional methods.

6. Curriculum and Instruction

High-quality schools have an integrated model of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that meets the needs of students? Does the applicant cite research support for its curriculum? Is the mission reflected in the educational program?

Evaluation Criteria: A response that meets the standard will present a curriculum plan that:

1. Describes the educational program of the school.
2. Identifies the content of the instructional program.
3. Characterizes the instructional methodology to be utilized by the faculty.
4. Explains how chosen instructional content and methodology will achieve the school's objectives.
5. Describes the research that supports this approach to educating children.
6. Describes the program design, methods, and strategies for serving students with disabilities and for complying with all related federal laws and regulations.
7. Describes the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	x	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Curriculum aligns with mission, vision and education design
Concerns/Questions	<p>Curriculum content description does not provide enough concrete methods for successful implementation to reach standards.</p> <p>Proposal does not have clear educational outcomes and associated content that students are to learn.</p> <p>How will this curriculum address difficulties low achievers have, as they may be working from a limited background knowledge base and have a lack of self-discipline when it comes to inquiry-based learning?</p> <p>I would have liked to know more about the individualized learning plan.</p>

7. Standards, Assessment, and Accountability

OEO authorized schools must meet standards of accountability. Have the applicants provided a model of accountability that will be generally accepted by the public and have they implemented the testing standards required by state law? Have the applicants described how these standards will be integrated into the instructional process to improve student performance?

Evaluation Criteria: A response that meets the standard will:

1. Describe the standards on which the educational program will be based.
2. Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined.
3. Describe the requirements for high school graduation (if applicable).
4. Define how the results of the educational program will be assessed.
5. Describe the student achievement goals that will be met during the first five years of operation.
6. Describe how the school will ensure the quality and availability of needed data and information.
7. Describe how standards, assessment, and accountability will be integrated into a coordinated system.
8. Describe how effective performance management systems will be provided to improve student and organizational performance.
9. Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	There are a variety of assessment measures and measurable goals
Concerns/Questions	I'm not fully convinced that the curriculum, standards, and assessment measures will align during implementation.

8. Educational Support Processes

High-quality schools have an educational program that is a well-defined plan of operation, understood by educators, students and families alike. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the educational program? Can you identify standards for behavior and disciplinary practices to be used by the program? Does the plan describe a clear plan for meeting the broad spectrum of educational needs of special education students and dual language learners?

Evaluation Criteria: A response that meets the standard will:

1. Describe how key processes for design and delivery of the educational program will be managed.
2. Describe how instructional content and methodology will be continuously improved.
3. Explain the procedures for ensuring the health and safety of students.
4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
6. Identify key student services and how they will be managed.
7. Describe how key processes that support daily operations will be managed.
8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing.
9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Involves teachers in the development of the educational program. Offers educational alternatives for students who are expelled or suspended. Management systems for maintaining records and for monitoring program have been identified.
Concerns/Questions	Proposal lacks a systematic process for continuous improvement of the instructional content and methods.

9. Business and Financial Operations

High-quality schools have solid fiscal plans and management strategies. Do the personnel have the expertise to properly manage the financial affairs of the school? Is the business plan suggested in the application realistic given the state per pupil allocation? Does the financial analysis appear to be realistic and have the developers given due consideration to all major elements of a business plan including marketing, student recruitment strategies, and fundraising strategies? Has the applicant identified a school building? Does the applicant have sufficient assets to lease/purchase and operate a site?

Evaluation Criteria: A response that meets the standard will:

1. Identify the individuals and their level of expertise who were involved in developing the schools financial plan.
2. Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school.
3. Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required.
4. Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation.
5. Provide a description of the school facility, or proposed facility, and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility.
6. Describe the transportation arrangements made for the charter school students.
7. Describe how food services will be provided for students.
8. Provide revenue and expenditure budgets for the first three years of operation.
9. Provide a projected cash flow statement for the planning stage and the first year of operation.
10. Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation.
11. Show how the budget addresses the unique aspects of the school.
12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).
13. Present a plan for raising funds needed beyond the per-pupil allocation provided under state law.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns (use as much space as needed.)

Strengths	School had already received a \$700,000 planning grant and has a line of credit. Location already secured. Proposed facility has sufficient details, including area of the city best suited to meet mission and vision, square footage, building
-----------	--

	amenities to satisfy needs, and planning for future growth of the school.
Concerns/Questions	

10. Legal Requirements and Procedures

Schools authorized by OEO must be operated in accordance with all applicable federal and state charter school laws and requirements. Does the applicant understand the legal requirements and have the ability to operate within these requirements?

Evaluation Criteria: A response that meets the standard will:

1. List the legal requirements for operating a public charter school.
2. Describe the policies and procedures developed to address these requirements.
3. Describe the level and types of insurance coverage the board will provide.
4. Explain the school's student records plan for developing and maintaining student achievement, health, emergency contact, high school credit, activities, and the like.
5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Proposal indicates an understanding of state policies and procedures.
Concerns/Questions	

SUMMARY ASSESSMENT

Please use your evaluation of the 10 criteria to make a decision regarding your overall assessment of the application below.

Electronically highlight your summary assessment

Approve: *Application is acceptable and should be considered for potential charter status.*

- ☐ Superior: This proposal is very well developed and can contribute to school reform efforts to improve the quality of education for children at risk and children living in the city. The program plan and evaluation components are outstanding and will add to our understanding of education.
- ☒ Satisfactory: The proposal is sufficiently well developed that granting of charter status for planning purposes is realistic.

Additional Notes- While I believe that this charter school proposal is satisfactory and could potentially serve children in a distinct and innovative way, I think that more thought could be given to how the curriculum and instruction will align with the assessments and desired outcomes. This school design has a lot of moving parts which will require robust data systems and processes to regularly track leading and lagging indicators of student achievement, organizational operations and program effectiveness.

Deny: *Application is not acceptable and should not be considered for charter status. Use the space below to indicate rationale.*

- ☐ Unsatisfactory: The proposal requires extensive work and the planning group needs to reevaluate its goals for the program. Working with a consultant may be advisable.
- ☐ Does not fit within University's charter expectations.
- ☐ The proposal is lacking in research to support the program design and may wish to seek a charter from an organization other than the University.

Rationale:

Revise: *Application has potential but additional information is required. Use the space provided to specify area in need of revisions.*

- ☐ Needs Work: The proposal lacks in completeness and should be returned for further work to be submitted at a later date for further consideration.

Revisions Needed:

PHASE II APPLICATION - REVIEWERS GUIDE

Please consider the major elements of the proposal as outlined below.

Please evaluate the Phase II application as to how well the applicant has responded in a meaningful and informative manner about how they would operate their proposed charter school.

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, reliance is placed on each reviewer's summary judgment of the elements and overall final recommendation.

Please use the following statements to frame your final recommendation:

1. Acceptable and should be considered for potential charter status.
2. Not Acceptable and should not be considered for charter status.
3. Application has potential but additional information is needed. (Note: Reviewer must specify the areas of concern. This can include information needed for clarification, suggested revisions, and information that might make the application more complete.)

Please consider the entire proposal and avoid focusing on one aspect of the proposal in making a final recommendation.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using this rubric.
2. Each reviewer will complete their individual review, accompanying comments and final recommendation and submit this completed rubric to the Office of Educational Opportunity. If a simple majority of the committee rejects the proposal then no further action will be taken with the applicants. However, if a simple majority recommends accepting the proposal, then the OEO director will review the review materials (including comments from the committee about its strengths/weaknesses) and determine if the recommendation will be accepted. In cases where additional information is requested by the committee, the Director shall secure the requested information for the Evaluation Committee prior to a final recommendation to the OEO.
3. If a majority of the Evaluation Committee makes a favorable recommendation and the Director accepts the recommendation, the Director shall make a summary recommendation to the System President. The President shall be informed, in a summary fashion, about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation of the committee, the Evaluation Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.

Phase II Rubric

Name of Proposed School:	Arbor Community School
Proposed Location of School: (What municipality?)	Madison, Wisconsin
Date:	1/28/2019
Name and Title of Reviewer:	

Final Recommendation (complete this section last by electronically highlighting your recommendation)

- ☐ **Accept for authorization**
☒ **Deny**
☐ **Resubmit with modifications for further consideration**

Please use this rubric to guide your assessment of the Phase II application.

The last page provides space to provide your summary assessment of the application and provide evidence to support your assessment. Please complete the last page in addition to providing your final recommendation in the box above.

Each section presents criteria for a response that meets the application requirement; these criteria should guide the overall rating for the section.

The Strengths and Concerns boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided. Please provide your assessment of the strengths and concerns, if any, for each section.

The following definitions should guide the ratings:

Meets the Standard:

The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:

The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:

The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice.

1. School Design Key Questions

The school must have a clear mission and an overall purpose for the educational program that meets the needs of students.

Does the application satisfy this standard? Is the design of the school grounded in research? Does it have unique aspects that will bring a new educational offering to the students?

Evaluation Criteria: A response that meets the standard will:

1. Provide the name of the proposed charter school.
2. Provide the name(s), address(es), telephone number(s), and email address(es) of the organization or individuals submitting the application to create a charter school.
3. Identify how the school will operate as a legal entity under Wisconsin law.
4. Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class.
5. State the mission and vision of the school.
6. State the core beliefs of the school.
7. Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices
8. Note the unique aspects of the school and explain why the community needs this school.
9. Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.
10. Characterize the school culture desired for the school and how this culture will be established.
11. Describe the process that will be used to develop an initial strategic plan.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) Innovation to advance education in our district, (2) Utilization of PBL, in order to ensure that students develop 21 st Century skills, (3) Scale of student population is manageable, and will facilitate the school’s ability to iterate learning design, (4) Teachers are empowered to lead, not only in classrooms but also in school design, and (5) Community engagement is central.
Concerns/Questions	(1) The research basis for the school’s pedagogy ought to be more fully developed. (2) The mission is so broadly stated, as to be ineffectual. Instead, it may have been more beneficial to identify the three pillars that appear to be the foundation upon which this school will be built: (a) to ensure student well-being; (b) to ensure that students develop 21 st Century skills, through IBL/PBL practices; and (c) to be an “innovation hub” for new teaching and learning practices within the school district.

2. Governance and Leadership

For long-term development, the school will need an effective governance structure. Is there evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school? Are there clear lines of authority established in the governance structure and are parents allowed the opportunity to participate in governance at the school? Does this application suggest that potential issues of discrimination (disability, gender, and race) would be of concern?

Evaluation Criteria: A response that meets the standard will:

1. Identify the organization and individuals involved in the development of the school.
2. Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization.
3. Describe the board that will be created to lead the school.
4. Describe the process to be used for the selection of board members.
5. State the general duties of board members.
6. Explain how the governance of the school will embody principles of democratic management, including but not limited to family participation.
7. Explain how the board will establish policy and work with educators to promote the goals of the program.
8. Attach a copy of the by-laws of the board (if available).
9. Attach a copy of articles of incorporation as defined by Wisconsin law.
10. List the names and occupations of individuals who will serve on the initial school board (if available).
11. Explain how the school will operate in terms of lines of authority and responsibility.
12. Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided.
13. Identify the criteria to be employed in hiring the school director/principal.
14. If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) The governance structure complies with statutory requirements. (2) The role of Board members is clearly delineated. (3) The holacratic organizational structure will empower school leaders to collaborate, innovate, take initiative, and take ownership over their work.
-----------	--

Concerns/Questions	(1) There are no criteria for hiring the school director/principal. While I understand that holocracy minimizes hierarchical leadership structures, this school will still need an administrative leader. How will the teachers identify an administrative lead role, if there are no criteria for them to do so? (2) The co-founders of the school and the Board members have no experience as educators, nor as school leaders. Nor do they have education degrees, which would provide content knowledge that will be necessary to lead and govern the school. As a result, I believe there is a significant gap in the content knowledge and professional skills that will be necessary to ensure such things as the successful hiring of teachers and school leaders, evaluation of pedagogical practice in classrooms, and efficacy of innovative practices.
--------------------	--

3. Community and Family Engagement

For any school to maintain long-term viability, it must have community involvement, be responsive to the community, and be in partnership with other community entities. Does the application satisfy this standard?

Evaluation Criteria: A response that meets the standard will:

1. Describe the community the school will serve.
2. Explain how the community has been involved in developing the school.
3. Explain how the community will be involved in the operation of the school.
4. Describe community partnerships the school will have or hopes to have.
5. Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built.
6. Describe how requirements, expectations, and preferences of students, families, and other stakeholders will be determined.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	The community partnerships that the co-founders have chosen to develop will advance the school mission and offer a diverse array of opportunities for students.
Concerns/Questions	(1) Why is the “political influence” related to the Goodman Center included within the application materials? Either the Goodman Center is an established partner, or a partnership in development. I wonder whether this application is an appropriate venue for airing some of the challenges that are inherent in building community partnerships. (2) In section 3.03 research related to community schools is cited. But the Arbor School is not structured as a community school. Thus, I wonder whether the co-founders understand the research and body of knowledge that fundamentally supports the community school movement in the United States. In other words, I worry that the co-founders may not have the subject matter knowledge necessary to lead, hire, and administer this school, and this reference may be an example of incomplete knowledge regarding the community school sector, within the field of education.

4. Marketing, Recruiting, and Admissions

For any school to recruit students, it must have a viable marketing and recruitment plan. Does the application satisfy this standard? By state law, charter schools are public schools that must be open to all students. Does the school have an appropriate plan to admit students without discrimination? Do the plans meet state and federal requirements?

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance amongst its pupils.
4. Describe admission policies and practices to be used to enroll students the first year and succeeding years.
5. Describe strategies to be employed when, and if, more students apply for admission than there are seats available.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	x	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) Student enrollment will be limited to 40, so as to "create a strong culture and sustainable model that can be replicated if necessary, over time. (2) The co-founders have a strong commitment to ensuring access for a diverse body of students, and to ensuring racial and ethnic diversity among students.
Concerns/Questions	While the co-founders have a strong commitment to ensuring access and diversity, they do not identify the criteria upon which their marketing program, three step grassroots strategy, and outreach strategies are based. Thus, I am left to wonder what criteria will be used to identify trusted community leaders, and to recruit students, families, and community members. I also feel worried that personal preferences may drive the three step, grassroots strategy upon which the marketing program is based, as distinguished from an objective set of criteria.

5. Faculty and Staff

High-quality school programs are based on effective staff recruitment and ongoing staff development. Have the developers effectively addressed these concerns? Does the plan provide a mechanism to recruit licensed faculty members and obtain licensure for those members not immediately meeting the requirement?

Evaluation Criteria: A response that meets the standard will:

1. Identify how administration, faculty, and staff will be recruited and how the school will ensure the quality of the workforce.
2. Describe how job requirements, compensation, career progression, workforce practices, and work environment will motivate faculty and staff to achieve high performance.
3. Describe how the faculty and staff education and training programs will support the achievement of overall objectives.
4. Describe how the work environment will foster learning and continuous improvement for both staff and students.
5. Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction.

Place an “x” in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) The hiring process is delineated in detail, and sets forth an objective set of steps for identifying qualified teachers. (2) There is a specific, three year professional development plan, which is equally available to all teachers.
Concerns/Questions	(1) Education research demonstrates that students from diverse backgrounds thrive when they can identify with their teachers, because they are from similar backgrounds. But there is no plan to recruit teachers and school leaders from diverse backgrounds, with whom students can identify. (2) There are no criteria for hiring school leaders, only for hiring teachers. Again, I wonder whether the co-founders have the subject matter knowledge necessary to understand the critical role that is played by a school principal, in terms of both student and teacher success. There appears to be an under-appreciation for the critical role of school leaders.

6. Curriculum and Instruction

High-quality schools have an integrated model of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that meets the needs of students? Does the applicant cite research support for its curriculum? Is the mission reflected in the educational program?

Evaluation Criteria: A response that meets the standard will present a curriculum plan that:

1. Describes the educational program of the school.
2. Identifies the content of the instructional program.
3. Characterizes the instructional methodology to be utilized by the faculty.
4. Explains how chosen instructional content and methodology will achieve the school's objectives.
5. Describes the research that supports this approach to educating children.
6. Describes the program design, methods, and strategies for serving students with disabilities and for complying with all related federal laws and regulations.
7. Describes the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) The educational program utilizes a full IQ-PBL model in a multi-age setting, requiring students to be in the field, working hand in hand with community members, as they expand their understanding and meet common core standards. (2) Personalized learning is encouraged via flexibility in the schedule and reduction in the practice of curriculum pacing. (3) Students with disabilities and English Language Learners will be welcomed into classrooms. Personalized learning pedagogical practices will facilitate IEPs and will ensure that ELL students receive the tools necessary to learn English in a timely manner.
Concerns/Questions	(1) How will teachers be evaluated for performance in the classroom? In other words, how can we ensure that the IQ-PBL curriculum is succeeding? (2) What professional organizations and resources will assist teachers and school leaders, as they develop, implement, and assess the curriculum?

7. Standards, Assessment, and Accountability

OEO authorized schools must meet standards of accountability. Have the applicants provided a model of accountability that will be generally accepted by the public and have they implemented the testing standards required by state law? Have the applicants described how these standards will be integrated into the instructional process to improve student performance?

Evaluation Criteria: A response that meets the standard will:

1. Describe the standards on which the educational program will be based.
2. Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined.
3. Describe the requirements for high school graduation (if applicable).
4. Define how the results of the educational program will be assessed.
5. Describe the student achievement goals that will be met during the first five years of operation.
6. Describe how the school will ensure the quality and availability of needed data and information.
7. Describe how standards, assessment, and accountability will be integrated into a coordinated system.
8. Describe how effective performance management systems will be provided to improve student and organizational performance.
9. Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	Because the State of Wisconsin has a core set of required assessment tools for students, ACS meets many of the requirements of this section.
Concerns/Questions	I do not understand who will observe teachers in the classroom and provide feedback and mentoring, as they strive to improve their teaching and learning practices.

8. Educational Support Processes

High-quality schools have an educational program that is a well-defined plan of operation, understood by educators, students and families alike. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the educational program? Can you identify standards for behavior and disciplinary practices to be used by the program? Does the plan describe a clear plan for meeting the broad spectrum of educational needs of special education students and dual language learners?

Evaluation Criteria: A response that meets the standard will:

1. Describe how key processes for design and delivery of the educational program will be managed.
2. Describe how instructional content and methodology will be continuously improved.
3. Explain the procedures for ensuring the health and safety of students.
4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
6. Identify key student services and how they will be managed.
7. Describe how key processes that support daily operations will be managed.
8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing.
9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
		X

Identify strengths or concerns. (Use as much space as needed.)

Strengths	(1) School discipline will be based upon a restorative justice model. (2) Conflict resolution will be based upon Montessori pedagogy, as well as the Peace Learning Center. (3) Students with disabilities will be co-educated in the same manner and quality as any other student.
Concerns/Questions	(1) There is no identified role for school leaders. Instead, staff are expected to self-select a peer leader. Yet, having an identified school leader is essential for the continuous improvement of schools, teachers, and students as they strive to succeed, each in their respective roles. (2) The design of the educational program did not involve teachers or school leaders.

9. Business and Financial Operations

High-quality schools have solid fiscal plans and management strategies. Do the personnel have the expertise to properly manage the financial affairs of the school? Is the business plan suggested in the application realistic given the state per pupil allocation? Does the financial analysis appear to be realistic and have the developers given due consideration to all major elements of a business plan including marketing, student recruitment strategies, and fundraising strategies? Has the applicant identified a school building? Does the applicant have sufficient assets to lease/purchase and operate a site?

Evaluation Criteria: A response that meets the standard will:

1. Identify the individuals and their level of expertise who were involved in developing the schools financial plan.
2. Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school.
3. Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required.
4. Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation.
5. Provide a description of the school facility, or proposed facility, and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility.
6. Describe the transportation arrangements made for the charter school students.
7. Describe how food services will be provided for students.
8. Provide revenue and expenditure budgets for the first three years of operation.
9. Provide a projected cash flow statement for the planning stage and the first year of operation.
10. Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation.
11. Show how the budget addresses the unique aspects of the school.
12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).
13. Present a plan for raising funds needed beyond the per-pupil allocation provided under state law.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns (use as much space as needed.)

Strengths	
Concerns/Questions	

10. Legal Requirements and Procedures

Schools authorized by OEO must be operated in accordance with all applicable federal and state charter school laws and requirements. Does the applicant understand the legal requirements and have the ability to operate within these requirements?

Evaluation Criteria: A response that meets the standard will:

1. List the legal requirements for operating a public charter school.
2. Describe the policies and procedures developed to address these requirements.
3. Describe the level and types of insurance coverage the board will provide.
4. Explain the school's student records plan for developing and maintaining student achievement, health, emergency contact, high school credit, activities, and the like.
5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	

SUMMARY ASSESSMENT

Please use your evaluation of the 10 criteria to make a decision regarding your overall assessment of the application below.

Electronically highlight your summary assessment

Approve: *Application is acceptable and should be considered for potential charter status.*

- ☐ Superior: This proposal is very well developed and can contribute to school reform efforts to improve the quality of education for children at risk and children living in the city. The program plan and evaluation components are outstanding and will add to our understanding of education.
- ☐ Satisfactory: The proposal is sufficiently well developed that granting of charter status for planning purposes is realistic.

Deny: *Application is not acceptable and should not be considered for charter status. Use the space below to indicate rationale.*

- ☐ Unsatisfactory: The proposal requires extensive work and the planning group needs to reevaluate its goals for the program. Working with a consultant may be advisable.
- ☒ Does not fit within University's charter expectations.
- ☒ The proposal is lacking in research to support the program design and may wish to seek a charter from an organization other than the University.

Rationale:

Revise: *Application has potential but additional information is required. Use the space provided to specify area in need of revisions.*

- ☐ Needs Work: The proposal lacks in completeness and should be returned for further work to be submitted at a later date for further consideration.

Revisions Needed:



Phase II Rubric

Name of Proposed School:	Arbor Community School
Proposed Location of School: (What municipality?)	
Date:	25/1/2019
Name and Title of Reviewer:	

Overall Assessment (complete this section last by electronically highlighting your recommendation)

- ☐ **Accept for further consideration**
- ☒ **Deny**
- ☐ **Resubmit with modifications for further consideration**

Please use this rubric to guide your assessment of the Phase II application.

The last page provides space to make your final recommendation and provide evidence to support your recommendation.

Each section presents criteria for a response that meets the application requirement; these criteria should guide the overall rating for the section.

The Strengths and Concerns boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided.

The following definitions should guide the ratings:

Meets the Standard:

The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:

The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:

The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice.



1. School Design Key Questions

The school must have a clear mission and an overall purpose for the educational program that meets the needs of students.

Does the application satisfy this standard? Is the design of the school grounded in research? Does it have unique aspects that will bring a new educational offering to the students?

Evaluation Criteria: A response that meets the standard will:

- X1. Provide the name of the proposed charter school.
- X2. Provide the name(s), address(es), telephone number(s), and email address(es) of the organization or individuals submitting the application to create a charter school.
- X3. Identify how the school will operate as a legal entity under Wisconsin law.
- X4. Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class.
- /5. State the **mission** and **vision** of the school.
- X6. State the core beliefs of the school.
- X7. Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices -
- X8. Note the unique aspects of the school and explain why the community needs this school.
particularly data from Center for healthy minds
- X9. Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.
- X10. Characterize the school culture desired for the school and how this culture will be established.
- X11. Describe the process that will be used to develop an initial strategic plan.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	1. The school founders' unwavering belief in the ability of students and the potential for the community is present in the application. However, translating this optimism into academic opportunities and outcomes may be more difficult than the founders anticipate given significant opposition to the concept and unclear financial plans.
-----------	---



	<ol style="list-style-type: none">2. Links to the Center for Healthy Minds would provide research legitimacy to the model, but it may limit access to and interest in the school.
Concerns/Questions	<ol style="list-style-type: none">1. Mission ambiguity: the mission needs a more measurable component, particularly since the model is less defined.2. Concept and Enrollment: the narrowly tailored vision and role may limit the pool of students who will opt-in to the school; low enrollment will inevitably create operational difficulties if not outright insolvency.3. Concept and Expenses: Translating the broad based vision and PBL model may result in extraordinary staffing, facility, and equipment expenses. Does the business plan fully consider the costs of translating this ambitious vision into reality.



2. Governance and Leadership

For long-term development, the school will need an effective governance structure. Is there evidence that the proposed governing board will contribute to the wide range of knowledge and skill needed to oversee a charter school? Are there clear lines of authority established in the governance structure and are parents allowed the opportunity to participate in governance at the school? Does this application suggest that potential issues of discrimination (disability, gender, and race) would be of concern?

Evaluation Criteria: A response that meets the standard will:

- X1. Identify the organization and individuals involved in the development of the school.
- X2. Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization.
- X3. Describe the board that will be created to lead the school.
- /4. Describe the process to be used for the selection of board members. **More evidence of intentionally diverse and qualified Board recruitment / retention is needed. Prior conversations about the applicant indicate such efforts are underway, but the breadth of outreach is missing from the application.**
- X5. State the general duties of board members.
- /6. Explain how the governance of the school will embody principles of democratic management, including but not limited to family participation. **Generally good, but I would like to see more information about ongoing relationship building beyond the annual meeting. How will the multiple stakeholders build a community that attracts students and staff; and then retains them?**
- /7. Explain how the board will establish policy and work with educators to promote the goals of the program. **Generally strong concept, but no clear process or procedural plan.**
- X8. Attach a copy of the by-laws of the board (if available).
- X9. Attach a copy of articles of incorporation as defined by Wisconsin law.
- X10. List the names and occupations of individuals who will serve on the initial school board (if available).
- X11. Explain how the school will operate in terms of lines of authority and responsibility.
- X12. Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided.
- O 13. Identify the criteria to be employed in hiring the school director/principal. [Listed as N/A, there will need to be a director, principal of record.]**
- X14. If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation. **N/A**

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.



Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	<ol style="list-style-type: none">1. Governance: Micro-schools come with their own governance challenges, particularly around regulatory compliance, oversight on student services, and financial management. It is strongly recommended the Board consistently include a member with significant financial management or background. Additionally, it is strongly recommended that the Board consistently consult with micro-schools across the country to identify potential issues and review potential solutions to issues.2. Leadership: Clarification on I am unclear on the school leader answer. Whether the school staff share administrative responsibilities, there will still need to be an administrator of record for both state and federal reporting purposes.



3. Community and Family Engagement

For any school to maintain long-term viability, it must have community involvement, be responsive to the community, and be in partnership with other community entities. Does the application satisfy this standard?

Evaluation Criteria: A response that meets the standard will:

- /1. Describe the community the school will serve. **The proposal provides a vague concept without specific callout to how particular subgroups will be attracted to the school and retained on the campus; similar concerns about how staff will be attracted/retained.**
- /2. Explain how the community has been involved in developing the school. **Written documentation does not reflect active engagement that has occurred through out their application.**
- /3. Explain how the community will be involved in the operation of the school. **The lack of geographic specific plans and enrollment strategies cause me concern.**
- /4. Describe community partnerships the school will have or hopes to have. **Some listed partners have already rejected partnership, e.g. Aldo Leopold. This causes me concern about (a) the accuracy of the application and (b) the long-term viability of partnerships given significant oppositional forces.**
- /5. Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built. **The proposal does not go beyond "opt in" based involvement. Self-selection is a part of a lottery-based public school, but there needs to be proactive engagement to make sure a diverse set of families (a) know they can opt in; (b) know what they would be opting in to; and (c) why they would want to stay. /**
- /6. Describe how requirements, expectations, and preferences of students, families, and other stakeholders will be determined. **I would prefer more robust planning on stakeholder investment and participation in the school – particularly more than on an annually basis.**

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	

4. Marketing, Recruiting, and Admissions

For any school to recruit students, it must have a viable marketing and recruitment plan. Does the application satisfy this standard? By state law, charter schools are public schools that must be open to all students. Does the school have an appropriate plan to admit students without discrimination? Do the plans meet state and federal requirements?

Evaluation Criteria: A response that meets the standard will:

/1. Describe the marketing program that will be used to inform the community about the school. **General conceptual plan is there, but not sure that it is based on market research re: student / family demand or a concept the founders personally want.**

/2. Explain how students will be recruited for the program. **Community partnership engagement in enrollment needs to be significantly beefed up if the school is going to hit enrollment targets. Barriers such as transportation, risk of a start-up school, and local opposition to the school cause me concern.**

/3. Describe the means by which the school will achieve a racial and ethnic balance among its pupils. **The proposal makes equity and inclusion a priority, but beyond the governance board and multi-lingual informational posters, how the commitment becomes real remains unclear. Given difficulties faced by OEO's two existing schools and Madison's hyper racial and economic segregation, I believe a more aggressive and strategic enrollment strategy is needed.**

4. Describe admission policies and practices to be used to enroll students the first year and succeeding years.

Question: Is Arbor willing to cap the amount of statutory enrollment preferences for staff etc?

5. Describe strategies to be employed when, and if, more students apply for admission than there are seats available.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	<p>1. Visibility: I am concerned about how the school will overcome the outward hostility launched at the proposal. Many students and families are cautious about trying a new school; how will the founders create positive visibility in the community?</p> <p>2. Enrollment targets: Existing start-up schools across Wisconsin face significant marketing and enrollment challenges. The founders need a more robust plan but the plan cannot violate the spirit or the letter of the law on recruitment (e.g. no incentives for applications or enrollment).</p>



	<ol style="list-style-type: none">3. Market-study: Are there enough identified potential students who want / need the model? Or are the founders opening based on hope and optimism?4. Financials: Does the budget fully contemplate the cost of recruiting and educating families? How will market penetration actually happen? Who will fund info sessions? Who will fund recruitment materials? How will mailing lists be identified or purchased? It would be worth connecting the founders with UW-M's PBL micro-school to identify recruitment and enrollment strategies that worked and those that did not.5. D&I Beyond Mailers: Given Madison's alarmingly high segregation rates, how do the founders propose to gain access to recruitment opportunities with community groups or organizations that serve Madison's diverse population?6. Transportation: I may have missed it, but is there a strategy around transportation to bolster enrollment? It is highly unlikely the city bus union will provide any discounted or partnership rate to transport students – so funding would need to be considered.7. Lottery waiver: Are the applicants indicating a limit on the number of lottery-waiver students? If so, it may limit staff recruitment.
--	--



5. Faculty and Staff

High-quality school programs are based on effective staff recruitment and ongoing staff development. Have the developers effectively addressed these concerns? Does the plan provide a mechanism to recruit licensed faculty members and obtain licensure for those members not immediately meeting the requirement?

Evaluation Criteria: A response that meets the standard will:

/1. Identify how administration, faculty, and staff will be recruited and how the school will ensure the quality of the workforce. **National recruitment strategies are failing at existing districts and networks. The organizations and methods described are optimistic and may fail. Significant work needs to be put into securing staff on all levels. The application seems to ignore the impact of local climate may have on recruitment and retention.**

X2. Describe how job requirements, compensation, career progression, workforce practices, and work environment will motivate faculty and staff to achieve high performance. **I am concerned about how the PBL concept and limited number of students will make PD difficult, if not cost-prohibitive. We need to consider recruitment and retention across a broad range of content areas and sub-skills. We also need to consider how the admin staff will be recruited and retained.**

X3. Describe how the faculty and staff education and training programs will support the achievement of overall objectives.

X4. Describe how the work environment will foster learning and continuous improvement for both staff and students. **I am concerned the fluidity of the concept may limit staff and student potential. PBL is incredibly difficult to execute. Given limited success from other WI models, I am concerned that the work environment plan needs to focus more on PD for staff**

X5. Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	<ol style="list-style-type: none">1. Staff recruitment and retention: The intentional attacks by district leadership and former board members may create larger barriers than the founders and initial board expect.2. Staff development: What partnerships exist or will exist to train core faculty and support staff on the model? What long-term planning exists for building their own staff beyond on relying on national entities and broad based searches?

6. Curriculum and Instruction

High-quality schools have an integrated model of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that meets the needs of students? Does the applicant cite research support for its curriculum? Is the mission reflected in the educational program?

Evaluation Criteria: A response that meets the standard will present a curriculum plan that:

/1. Describes the educational program of the school. **Generally, leans on PBL summary without much site specific content concepts. Significant concerns about the location – how will nature based activities occur on Atwood?**

/ 2. Identifies the content of the instructional program. **Conceptually sound, but the nature of the school makes additional (and desired) details difficult to identify.**

X3. Characterizes the instructional methodology to be utilized by the faculty.

/4. Explains how chosen instructional content and methodology will achieve the school's objectives. **References back to a prior section without adding additional nuance or detail on the content / instruction side.**

X5. Describes the research that supports this approach to educating children.

/6. Describes the program design, methods, and strategies for serving students with disabilities and for complying with all related federal laws and regulations. **The proposal lacks sufficient evidence of an understanding of the cost to comply with special education law, particularly within an independent / PBL setting. I would request additional planning information on how the school would (a) fund special education costs and (b) secure employees directly or contract based support. Given MMSD's open hostility to the school it is likely extraordinarily unlikely that the Board would approve contract based support services for Arbor.**

7. Describes the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations. **The proposal lacks sufficient evidence of an understanding of the cost to comply with dual language services, particularly within an independent / PBL setting.**

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	

7. Standards, Assessment, and Accountability

OEO authorized schools must meet standards of accountability. Have the applicants provided a model of accountability that will be generally accepted by the public and have they implemented the testing standards required by state law? Have the applicants described how these standards will be integrated into the instructional process to improve student performance?

Evaluation Criteria: A response that meets the standard will:

/1. Describe the standards on which the educational program will be based. **CC aligned, but the plan lacks sufficiently articulated standards regarding how the C&I will be developed, executed, or monitored..**

/2. Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined. **A standardized test would need to be selected prior to the execution of any contract as the application provides a list of multiple options – but no plan.**

X3. Describe the requirements for high school graduation (if applicable).

X4. Define how the results of the educational program will be assessed.

X5. Describe the student achievement goals that will be met during the first five years of operation.

X6. Describe how the school will ensure the quality and availability of needed data and information.

X7. Describe how standards, assessment, and accountability will be integrated into a coordinated system.

X8. Describe how effective performance management systems will be provided to improve student and organizational performance.

X9. Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	

8. Educational Support Processes

High-quality schools have an educational program that is a well-defined plan of operation, understood by educators, students and families alike. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the educational program? Can you identify standards for behavior and disciplinary practices to be used by the program? Does the plan describe a clear plan for meeting the broad spectrum of educational needs of special education students and dual language learners?

Evaluation Criteria: A response that meets the standard will:

- /1. Describe how key processes for design and delivery of the educational program will be managed. **What happened to the nature focus?**
- 2. Describe how instructional content and methodology will be continuously improved. **Unclear /how the PBL will occur in practice.**
- 0 3. Explain the procedures for ensuring the health and safety of students. **Significant concerns about the lack of understanding of complying with special education law.**
- /4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
- X5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
- /6. Identify key student services and how they will be managed. **Concerns about special education again.**
- /7. Describe how key processes that support daily operations will be managed.
- /8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing. **The founders seem to not understand the role and function of special education in compliance terms. The phrase PBL inherently serves "all students" is a solid talking point, but I am not sure a full recognition of compliance is present.**
- /9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment. **Not sure if the school has fully executed an enrollment strategy, but this could be remedied in contracting.**

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	



9. Business and Financial Operations

High-quality schools have solid fiscal plans and management strategies. Do the personnel have the expertise to properly manage the financial affairs of the school? Is the business plan suggested in the application realistic given the state per pupil allocation? Does the financial analysis appear to be realistic and have the developers given due consideration to all major elements of a business plan including marketing, student recruitment strategies, and fundraising strategies? Has the applicant identified a school building? Does the applicant have sufficient assets to lease/purchase and operate a site?

Evaluation Criteria: A response that meets the standard will:

/1. Identify the individuals and their level of expertise who were involved in developing the schools financial plan. **Long term viability for micro-school financing and lending for the building cause significant concerns.**

02. Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school. **Significant concerns – who will the school leader be? I understand it is a teacher led school, but who is the administrator of record? A CESA? An EMO? Who?**

03. Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required. **Significant concerns, particularly given proposed personal debt and a lack of understanding of the costs related to special ed / other special services.**

0 4. Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation.

The site is located in a densely urbanized area that is disconnected from the original proposal. How will students access nature? Will they walk across major roads? How does this meet the contingency?

0 5. Provide a description of the school facility, or proposed facility, and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility.

Significant concerns about physical layout – would need to check with legal on compliance?

6. Describe the transportation arrangements made for the charter school students.

It is unclear how the proposed contract will be secured – do they have a vendor? Based on costs seen at other schools, I am not sure this is a viable budget.

X7. Describe how food services will be provided for students.

/8. Provide revenue and expenditure budgets for the first three years of operation.

See concerns about micro-school funding.

/9. Provide a projected cash flow statement for the planning stage and the first year of operation.

/10. Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation. **Some concerns about micro-school budget and contingency plans if enrollment targets aren't hit.**

X11. Show how the budget addresses the unique aspects of the school.



X12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).

-13. Present a plan for raising funds needed beyond the per-pupil allocation provided under state law.

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Identify strengths or concerns (use as much space as needed.)

Strengths	
Concerns/Questions	

10. Legal Requirements and Procedures

Schools authorized by OEO must be operated in accordance with all applicable federal and state charter school laws and requirements. Does the applicant understand the legal requirements and have the ability to operate within these requirements?

Evaluation Criteria: A response that meets the standard will:

X1. List the legal requirements for operating a public charter school.

X2. Describe the policies and procedures developed to address these requirements.

X3. Describe the level and types of insurance coverage the board will provide.

4. Explain the school's student records plan for developing and maintaining student Xachievement, health, emergency contact, high school credit, activities, and the like.

XX5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

Place an "x" in the box below that fits your analysis of the requirements or electronically highlight your conclusion.

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Identify strengths or concerns. (Use as much space as needed.)

Strengths	
Concerns/Questions	



REVIEW SUMMARY

Please use your assessment of the 10 criteria to make a decision regarding your recommendation for the application below.

Recommendation (Electronically highlight your recommendation)

Approve: Application is acceptable and should be considered for potential charter status.

- ☐ Superior: This proposal is very well developed and can contribute to school reform efforts to improve the quality of education for children at risk and children living in the city. The program plan and evaluation components are outstanding and will add to our understanding of education.
- ☐ Satisfactory - The proposal is sufficiently well developed that granting of charter status for planning purposes is realistic.

Deny: Application is not acceptable and should not be considered for charter status. Use the space below to indicate rationale.

- ☐ Unsatisfactory: The proposal requires extensive work and the planning group needs to reevaluate its goals for the program. Working with a consultant may be advisable.

X Does not fit within University's charter expectations.

I have significant concerns about the ability of the founders to recruit staff given ongoing battles; I also do not believe the location meets the proposed concept. At this phase I believe we should reject the proposal.

- ☐ The proposal is lacking in research to support the program design and may wish to seek a charter from an organization other than the University.

Rationale:

Revise: Application has potential but additional information is required. Use the space provided to specify area of needing revisions.

- ☐ Needs Work: The proposal lacks in completeness and should be returned for further work to be submitted at a later date for further consideration.

Revisions Needed:



Office of the President
1700 Van Hise Hall
1220 Linden Drive
Madison, Wisconsin 53706-1559
608-262-2321
rcross@uwsa.edu
www.wisconsin.edu

February 4, 2019

Melissa Rosenkranz
Lynn Munsinger Brown

Via email: melissarosenkranz@gmail.com

Via email: lmunsing@gmail.com

Dear Ms. Rosenkranz and Ms. Munsinger Brown,

As per your previous conversations with the Office of Educational Opportunity ("OEO"), your eligibility to enter into contract negotiations for a charter school with the University of Wisconsin System Administration was contingent on securing an acceptable location for the proposed school. As you know, this contingency was imposed to ensure the site selected would facilitate the goal to provide access to project-based learning opportunities with a proposed emphasis on nature. This curricular focus is most clearly encapsulated by the name selected for the proposed school: Arbor.

I appreciate your efforts to provide such an option for students, families, and educators. However, I am not confident the proposed location you submitted achieves the stated goal. As such, I have directed OEO to close Arbor's application as a location that meets the proposed concept was not identified.

As I understand it, Arbor was originally intended to be located at the Aldo Leopold Nature Center. Then, Goodman Community Center was identified as the likely location for Arbor. Although a lease has yet to be executed, Arbor is now proposed to be located at St. Bernard's Parish on Atwood Street in Madison.

I believe this third proposed location lacks meaningful access to green space, which is a significant departure from a key component of the proposed school. The lack of meaningful access to green space, particularly after several prior shifts in the school's potential location, coupled with concerns about the school's ability to recruit the staff necessary to succeed based on the proposed model leads me to conclude the proposal is not ready for authorization.

Again, I appreciate the work that went into this proposal. It is unfortunate a more fitting location could not be identified and secured.

Thank you,

A handwritten signature in black ink, appearing to read 'Raymond Cross'. The signature is fluid and cursive, with the first name 'Raymond' and last name 'Cross' clearly visible.

Raymond Cross
President