



## PROSPECTUS PART B REQUIREMENTS

**Please complete this prospectus in 20 pages or less, convert it to a PDF when complete, and submit the completed PDF and any related attachments.** Any submission submitted after 5:00 p.m. on the last day of the application cycle will be rejected. A prospectus has not been officially submitted until you receive confirmation of a successful submission. These questions supplement the Prospectus questions found on the Office of Educational Opportunity's website.

*Note: Community | Learning | Design, Inc is a school design firm and Teacher Professional Practice and is facilitating the design and implementation for this school. The mission, name of the school, and even final location will be driven with the close collaboration and partnership of the students and their families.*

### 1. Mission/Vision Statement for the Charter School

- a. What is the mission of the school?

The students will create and curate the mission of the school. The mission of the school design firm behind the school is: *To facilitate the democratic design of learning spaces and support the educators responsible for that work.*

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

School #1 is a student-designed space: the students are co-designers of the teacher-led school.

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

**Students** are universally engaged in their learning and in the administration of their school -- deliberative, participatory, democratic processes for decision-making at the school are well established but continue to be responsive to changing community needs. **Families** are connected to the learning and governance happening at the school, and community stakeholders know the school by name and feel unequivocally welcome to drop in to share their perspectives, needs, and concerns. The school's culture, at the student and teacher levels equally, is rooted in deep commitments to each other and to the school as an embodiment of the community we have built together. Newcomers are welcomed without exception, and "old-timers" are comfortable helping the new ones learn how to be, learn, work, and share within the school community. **Our graduates** remain connect to their school, and report back being college, career, and community ready. **Our teachers** are engaged, and have just celebrated opening a second school. After five years, we have fully operationalized the concepts of student-designed spaces and have developed a best-practice example of incorporating youth into the design or re-design process. The school is the curriculum. Our students are prepared to learn,

create, and serve their community.

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

The school will increase educational equity by developing the agency and leadership capacity of *all* students. School #1 will recruit and retain students living in poverty and build partnerships with organizations in Dane County serving At-risk youth and children from underserved populations. We will increase educational equity by placing student voice and educational opportunities in the design of the school that will prepare students to be informed and active citizens living in a democracy.

School #1 will incubate innovations by curating the journey of having students design a school; and, implementing a distributive leadership model to lead and manage all the affairs of the learning environment.

The following underutilized best-practices will be implemented in School #1:

- i. Fusing student-directed learning with rigorous instruction in a small school setting to serve the students' needs.
  1. Each student will have a personalized learning plan;
  2. Each student will have the opportunity to design their learning experience;
  3. Through implementing participatory budgeting practices, the students and families will have a voice in resource allocation decisions and students will get hands-on personal financial literacy experiences;
  4. Place-based instructional practices are leveraged whenever possible. Learning takes place in the community, region, and travel is incorporated into the curriculum whenever possible.
- ii. Teacher-led Collaborative
  1. Teacher-led school;
  2. Distributive leadership practices embedded into the management of the day-to-day school affairs;
  3. Highly qualified professional educators are trained and retained through providing a professional environment and a living-breathing professional learning community is in place;
  4. Partnerships with the UW system will be sought out to maintain professional development plan and sustain innovation.
- iii. Action Civics
  1. The democratic design of the school will require a plan for "reiterating the design;"
  2. By ensuring continued deliberative and participatory democratic decision-making within the school, students will



have hands-on experiences with authentic collaborative control of their institution;

3. This will be an exemplar of the rapidly-developing field of Action Civics.

iv. Participatory Design

1. The school is designed with the end user, the student, and therefore will be highly contextualized to the needs of the students in the local community;
2. The school will be in a perpetual state of design: also called "meta-design." The deep and focused study of the "design of design" will lend itself to perpetual innovation in teaching and learning.

## 2. Description of the school/program.

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

School #1 is a multi-age secondary school and will be open to pupils ages 12-19; commonly known as grades 7-12.

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

Ideally, School #1 will open with 64 students ranging in ages from 14 - 16 years old. Over the first three years of the school being opened, the student body will age towards both graduation and recruiting younger students. As the student body increases, staff will also be added. By the 2021-22 school year, School #1 will have a graduating class. A teaching faculty of 7.0 full-time equivalent (FTE) and a development and administrative assistant team of 1.5 will be able to manage and lead a school community of 150 dedicated youth. Part-time professionals will be utilized to meet the needs of the youth and a dedicated team will work collaboratively to constantly strive to meet the mission and vision of the school. In this ideal scenario, an aggressive recruiting campaign will begin in early May of 2018 to assemble a Design Cohort.

The Design Cohort is a group of 24 - 50 students who will design the school by working in close collaboration with the school developer and governance board president. Through completing a series of evidence-based, peer-reviewed activities along with activities intentionally designed to build community, the Design Cohort will create a design essentials checklist during planning. The Design Cohort will also develop protocols for action and procedural agreements. These founding documents outline every facet of the school. The Design Cohort will be students enrolled in other area schools during the 2018-19 school year, therefore, the team will meet after school and on weekends.



School Year	Students	Teaching Faculty	Development & Admin Assistant Staff
2018-19 (Planning)	24 - 50 (Design Cohort)	1.0	0.0
2019-20	64	3.0	1.0
2020-21	100	5.0	1.5
2021-22	150	8.0	1.5

- c. How students will be recruited and general admission policy:  
Students will be recruited to join the Design Cohort through an aggressive social media campaign, word of mouth strategy, and community forums in the Madison area. The school developer and governance board president have experience with managing Facebook's Business Manager and will utilize the tool to create ads targeted to drawing youth and families to the initial information sessions being held in May, June, and July of 2018.

SchoolAdmin.com or a facsimile will be purchased to develop a database of prospective students and communicate regularly with them. This tool will seamlessly integrate with the Student Information System (SIS); and transition into a singular platform for families to be a part of the school community and will work to spread the message of the school.

Finally, the school developer and governance board president have been piloting a design process in pre-planning where families can sit in observe the design process without being a part of it. This "Open-design | Closed-design" framework has been carried out at conferences such as EdCampMadisonWI and EduCon2018. The process grows out of the concepts of open meetings and closed meetings carried out by public school boards. Throughout planning, most of our design sessions will exist in an open-design; meetings will open in a circle, and series of chairs will be set up outside the circle for potential participants to observe the activities. This process builds-in choice and limits coercion. In the event that specific-stakeholder privacy is necessary; or, private conversations are more appropriate, a closed-design activity commencement will proceed with detailed notes and assurances of privacy. An example where this would be appropriate is if the Design Cohort is settling on a specific school location and is narrowing the potential sites from a list of five to two. This closed-design may include stakeholders such as parents, enrolled students, governance board members, and school faculty. However, prospective parents attending their first



community design session will not be equipped with the experiences or background that went into previous decision making and would be asked to leave the activity and rejoin after a decision was made. This process is similar to the closed-meeting decision-making framework employed by local school boards when carrying out personnel decisions.

d. Special issues or characteristics of the school:

As a student-designed school, School #1 has a myriad of special issues and characteristics; namely, democracy. Democracy is slow, messy, and cumbersome. Democracy is also beautiful, evolving, and a 400 year project in the United States that has been proven to fully develop the agency of those who embark on understanding and implementing it.

School #1 will boldly stand on the side of a democratic learning environment and steer away from tyrannical authoritarianism in order to allow youth to engage in learning and dream-making. In order to do so, we need students committed to managing and leading the school they inhabit.

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

The guiding philosophy of School #1 is that every voice is important and the process by which we make decisions matters. Students engage in democracy by shaping their school. This guiding philosophy of a student-designed space connects to and shapes the landscape of the entire organization.

School #1 is teacher-led. A cadre of teachers will be responsible for the management and leadership of all school operations. Through start-up, the 2019-2020 school year, all full-time teachers will serve on the governance board or lead a sub-committee of the board.

The culturally relevant curriculum will emerge through the planning year and address the needs of the youth in the school community. The curriculum will be rigorous, useful, and connect to skills necessary to succeed in college, in the workforce, and to lead a healthy-balanced life.

The school developer and governance board president have extensive classroom experience with the student-directed project based learning, Service Learning, STEM, and personalized learning. The small school will leverage these experiences to meet the instructional needs of the student population.



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

The central curriculum and instruction of "School #1" will be *emergent* -- that is, we will define the learning practice alongside the learners as we engage in democratic, participatory school design together. However, as co-designers, the members of Teacher Professional Practice that are facilitating the design will walk in the door with certain *non-negotiables* that will guide our work while designing. Using a consensus model for decision-making allows that, though we are sharing power with students in a very real way, we can withhold our consent from any design decision that violates our non-negotiable "design essentials."

For C|L|D, these non-negotiables include:

- Benchmark-aligned literacy
- Benchmark-aligned numeracy & analytic thinking
- "Action Civics" (ongoing commitment to student democratic engagement)
- Mixed age, small-group advisories
- Learning based on student interest, passion, and purpose (likely taking the form of some amount of "student-directed project based learning," leveraging community connections and a "STEAM" framework)

## **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?**

Extensive research in the learning sciences and psychology has demonstrated the value of agency and growth in the adolescent developmental level leading to autonomous learners. Bandura (2001) used a three-prong definition of agency:

1. I can because I know I can,
2. I can because you say I can,
3. We can because we decided to.

The third aspect, of agentic decision making by consensus is a methodology School #1 aims to produce improve over time.

Student academic engagement has been on the decline since the 1970's (Marks, 2000; Shen et al., 2015). Recent research from Reeve and Tseng (2011) suggests agency - or agentic opportunities - can lead to increased academic student engagement. And student academic engagement leads to academic achievement (Marks, 2000).



School #1 will seek to enhance student academic engagement by providing opportunities for the users of the school - the students and families - to create, re-create, and imprint their ideas and inspiration into the learning environment.

Ferris-Berg (2014) has done extensive research on the teacher-led school model and has developed a “teacher-powered” framework to communicate the various successful distributive leadership models. Newell and Van Ryzin (2007) demonstrated the potentiality for student-directed learning when youth are allowed to make decisions in the curriculum selection and learning process. Discovery learning has gaps, specifically, pure discovery learning fails to prepare students for the math skills and analytical thinking required to succeed in post-secondary school systems (Mayer, 2007). School #1 will leverage existing best practices and work with families and students to boldly explore new ones. We will put the students educational needs and vision for the their best-self at the center of all that we do; and we will chronicle and curate our successes and failures.

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

The precise governance structure to be used during school operations will emerge in planning. Community | Learning | Design, Corporation, Inc is a 501(c)3 non-stock, non-profit organization incorporated in the State of Wisconsin. This school design firm and Teacher Professional Practice has been responsible for the pre-planning efforts to date. At the quarterly Board of Directors Meeting on January 5, 2018, a Governance Board for School #1 was officially established. A five-member board was created to complete documents necessary to guide School #1 into planning.

The Governance Board will include teachers, families, and students of the school. Upon successfully completing planning activities such as this prospectus, submitting a planning grant to the Department of Public Instruction, and recruiting prospective families; the existing Governance Board will seek other community leaders to serve.

The Governance Board will meet monthly to ensure the school is living out the mission, to raise the profile of the school, and to raise funds for the school. The Governance Board will hold an Annual Meeting by the end of October of each year. At this meeting, all budgetary items for the fiscal year will be approved.

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

School systems typically allocate 85% - 88% of total revenue for personnel. School #1 will not exceed 80% and will strive for 70% of per pupil revenue to go towards personnel. By the 2021-22, 150 pupils will generate approximately \$1,200,000 (150 x \$8,000 =





\$1,200,000). Seventy percent of \$1.2 million is \$840,000 and that figure will cover the personnel of this teacher-led school. The remaining 30% or \$360,000 will go to running the operations of the school. Additionally, the non-profit organization of C | L | D will aggressively pursue grants and donations from the Department of Public Instruction, Gates Foundation, New School Fund, and other entities supportive of serving educationally disadvantaged youth and innovative school systems.

The planning team is aware that small-schools have historically struggled to sustain an educational program due to two difficult issues: facilities and a paying highly qualified staff; therefore, within the planning of School #1, both of these issues will be addressed with the students and families. The school developer and governance board president are forming partnerships with other non-profit organizations in the Madison and Fitchburg area to create alliances to serve educationally disadvantaged youth.

A few non-negotiables drive our zero-based budgeting process. They are:

1) All students will eat. We will provide our community with food, and students will learn how to eat, grow food, and plan food into their day;

2) All students will learn how to budget their personal finances to the level of mastery, meaning, graduates will be prepared to live on their own and understand how much money will be required to do so;

3) The revenue remaining after personnel has been paid will be left to the community to create a participatory budget.

The school developer and governance board president are traveling to the Participatory Budgeting national conference in Phoenix, Arizona in March of 2018 to learn about a democratic budgeting process and plan to implement these practices into School #1.

### **9. The potential location of the school:**

School #1 will be located in the City of Madison or Fitchburg. The planning cohort will meet consistently at 100State, a meeting room at the South Madison Library, or other public venues with meeting rooms.

### **10. Evidence of support from the community:**

The evidence of support for a student-designed school dedicated to democratic learning and developing youth agency has developed over the last three years. At the national level, the school developer and governance board president are presenting Participatory School Design at EduCon2018 in Philadelphia and the Participatory Budgeting Conference in Phoenix. The Facebook page for Community | Learning | Design has developed a network of followers, and educators from around the Midwest donated to our GivingTuesday Fundraiser.

Immediately following successful completion of Phase I of this prospectus; a community organizing effort will be launched in Madison and Fitchburg. The school developer and governance board president will host frequent community information sessions at local venues. Community | Learning | Design, Inc will commit to a Facebook Ad campaign in



order to find youth interested in being a part of the design team.

Other community evidence is present in the lack of public secondary school options available in the Madison area.

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

The business plan for school development is contingent upon successful funding from two potential grant sources. Community | Learning | Design has applied for a \$200,000 start-up grant to the NewSchools Venture Fund, and will apply for an \$800,000 planning and implementation grant from the Wisconsin Department of Public Instruction. Both award announcements for the grants are announced in May. If either of these grants are successfully funded, the following development plan shall be pursued:

Planning into implementation: In April of 2018, bi-monthly community information sessions will transition from telling to recruiting. Participatory School Design activities will result in student co-creating the school's mission and vision statement, finding a school site, and developing curriculum with a codified curriculum program. Students and their families, faculty, and board members will embark on several school visits across the country to see innovative pedagogical models of secondary schools in urban and rural settings.

School #1 will enroll students full-time and open on August 15, 2019. Upon successfully receiving funds for planning, Community | Learning | Design, Corporation INC will hire a school developer; ideally, the individual would work full-time on this endeavor. However, funding restrictions may dictate the school development specialist works part-time and ramp up into a full-time positions as students and families are added to the design cohort. During planning (July 1, 2018 through May of 2019) students a part of the design cohort will be enrolled in other schools or be homeschooled. The design cohort will meet regularly in the evenings and on weekends to complete scheduled activities. Families will be able to opt-in and opt-out of events. The entire design process will be chronicled on a blog or space such as Google Classroom.

By February 15, 2019, a school site will have been finalized and a signed agreement will be in place with the Governance Board and the property owner.

By February 28, 2019, a signed contract with the Governance Board and independent authorizer will be in place.

By May 15, 2019, at least 40 students will be enrolled for the opening of the school, with an enrollment target of 64.

Privately funded planning: The design team is prepared to go through planning without funds from grant sources. This will be a lean school design, with many of the activities listed above occurring after the school has generated per pupil revenue.



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

A potential subcontract between School #1 and Community | Learning | Design seems likely. A Teacher Professional Practice will self-organize to manage and lead the administrative practices of the school, this will lead to other potential sub-contracts for the following services:

- a) Health insurance;
- b) Investment services;
- c) Other benefits agreed upon by the Teacher Professional Practice.

Potential subcontracts and agreements will be entered to fulfill the mission of the school and provide students services necessary to achieve and learn at a high level. Local and regional higher education schools will be communicated with during planning to seek articulation agreements to clarify potential dual enrollment opportunities.

Other potential subcontracts for transportation, food services, and janitorial services may be entered if necessary to carry out the basic operations of the school.



## References

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- Farris-Berg, K. (2014). A different model for school success: Empower teachers. *Phi Delta Kappan*, 95(7), 31-36.
- Marks, H. M. (2000). Student engagement in instructional activity: Patterns in the elementary, middle, and high school years. *American Educational Research Journal*, 37, 153 – 184.  
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- Mayer, R. E. (2004). Should there be a three-strikes rule against pure discovery learning? *American Psychologist*, 59(1), 14.
- Newell, R. J., & Van Ryzin, M. J. (2007). Growing hope as a determinant of school effectiveness. *Phi Delta Kappan*, 88(6), 465-471.
- Reeve, J., & Tseng, C. M. (2011). Agency as a fourth aspect of students' engagement during learning activities. *Contemporary Educational Psychology*, 36(4), 257-267.
- Shen, B., McCaughtry, N., Martin, J., Garn, A., Kulik, N., & Fahlman, M. (2015). The relationship between teacher burnout and student motivation. *British Journal of Educational Psychology*, 85(4), 519-532.

## Prospectus Rubric

School/Organization	CLD
Reviewer Name	Gary Bennett, Director OEO

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.
X	Mission/purpose is evident throughout prospectus.
	Mission/purpose is ambiguous, vague, or otherwise not compelling.
	Mission/purpose are absent from application. <b>(Dispositive of application. No need to proceed to subsequent sections for review.)</b>
Comments	The core mission is clearly and compellingly established. However, OEO questions what the ongoing design of the school will look like in practice. Will each incoming class design their own school? Or once the school is designed by the founding students will the school's concept remain static?
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	The concept is promising, however a few caveats. First, OEO strongly cautions the applicant consider broadening the method of attracting potential students from beyond social media given structural inequities in access to web based resources. Second, OEO cautions the applicant to consider the likelihood of existing schools granting access to their students for recruitment of potential future students / school design team members. Third, a Phase II application will need additional evidence of research based support for community designed schools.

C. Does the prospectus include a school design that is complete and well thought out?	
General Comments	Generally yes, but additional details regarding actual implementation are needed regarding ensuring school designers understand baseline regulatory requirements (e.g. content areas and standardized testing). Also, additional information about plans for compliance with student safety, health, academic outcome regulations, and financial regulations will be needed (e.g. licensure and budget planning).

<p>Yes or No &amp; Provide Comments</p> <p><b>No</b></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>While all schools exist and operate based on continuous community input, to OEO's knowledge no public school exists in the greater Dane County area that is the product of a wholly democratically controlled design process.</p>
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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:	<p>Given the concept of allowing democratically designed school, the prospectus is understandably thin in terms of content and instruction details. For a contract to be offered and executed, the applicant and design team will be required to prove understanding of baseline curriculum and instruction requirements.</p> <p>Section 2 of the prospectus recognizes the need to meet baseline standards (e.g. benchmark aligned curriculum), but additional details will likely be expected by the Selection Committee.</p>
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.
	Proposal includes evidence of support of the model from professional educators.
	Proposal includes evidence of support from students / families interested in the school.
Comments:	As per the prospectus, the level of local demand from local educators and families will be determined based on the design process. OEO will withhold judgement on this section until additional information is provided by the applicant.
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.)	
	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:	Additional information on ultimate decision makers and governance structures will be required for OEO's director to determine the proposals compliance with statutory governing board obligations for public charter schools. It is unclear if the names included in the Prospectus comprise the governing board or are co-applicants.
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.
	Financial concerns exist and are described below.
Comments:	Additional information about human resources expenses, gap financing for transportation, 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:	To be determined. The business plan will inherently be contingent on the school designed by the democratic process.
I. Prospectus's strengths	
Comments:	If actionable, the proposal would upend the largely top-down design and regulation of traditional public schools. This disruption would place power directly in the hands of students, families, and educators who opt-in to the school. Additionally, the school founders appear to have connections to national stakeholders who may be able to support the concept. Whether those connections translate into actual support is yet to be determined.

J. Areas of concern / need improvement	
Comments:	<ol style="list-style-type: none"> <li>1. Funding: Does the applicant believe the statutory charter per pupil payment amount is sufficient to support their plan? If yes, why. If no, what plans exist to secure additional funds? What will the additional funds be used for?</li> <li>2. Facilities: Prospective facilities are requested. A lease or ownership is not required, but enumerating prospective buildings would better inform Selection Committee members of the viability of the school.</li> <li>3. Local Demand: Evidence of local demand is requested with regard to student and educator interest beyond the applicants.</li> <li>4. Compliance with governing board regulation is requested. Are the five listed applicants the governing council? Or will the council be separately enumerated?</li> <li>5. Content planning: details about how democratically selected content/curriculum practices will comply with state and federal baseline requirements is requested.</li> <li>6. Actualizing Inclusion: a broader recruitment strategy for student planners and educators is requested to ensure the goal of including underrepresented groups is actualized.</li> <li>7. Student Services: Plans for how the process will comply with special education regulations is requested.</li> </ol>
K. Do you recommend the school/organization proceed to Phase 2? (Yes or no)	
Yes	

February 2, 2018

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

Community Learning Design  
ATTN: Michael McCabe  
422 Leslie Drive  
Edgerton, WI 53534

Dear Community Learning Design Stakeholders,

The University of Wisconsin System's Office of Educational Opportunity ("OEO") received a Prospectus Phase 1 application from you on December 15, 2018.

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. Additionally, Phase 1 approval does not make you eligible for Department of Education charter school grants.

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 September 7, 2018 for AY 19-20
  - b. Late submissions are automatically rejected without exception.
2. OEO's February 1 DPI Notice mandate
  - a. If you intend to operate starting AY 19-20, then OEO must submit intent to authorize notice to DPI no later than February 1, 2019.
  - b. Extensions for starting operations in AY 20-21 are granted at the discretion of OEO's director.

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

**PROPOSAL**

**to the**

**Office of Educational Opportunity  
University of Wisconsin System  
Van Hise Hall  
1220 Linden Drive  
Madison, WI 53706**

**Submitted by**

**Community | Learning | Design  
422 Leslie Drive  
Edgerton, WI 53534  
Sean Anderson and Dr. Michael McCabe, Directors**

**Title: Milestone Democratic School, Phase II Authorization**

**Date submitted: 09 December 2018**

## 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)

### **Milestone Democratic School: An emergent solution to two wicked problems**

Milestone Democratic School, as envisioned and proposed in this document, is the emergent result of a commitment to student voice as the most effective solution to two deeply intertwined problems: schools where students are disengaged from their own learning, and civic life where citizens are disengaged from their own democracy. If schools can become places where we learn to be open and trusting with each other, to make decisions through dialogue and deliberation, and to think critically, then these two intertwining problems can begin to be resolved, from the bottom up. Milestone Democratic School seeks to become this place of learning, and it seeks to do so on a foundation of democratic participation at all stages of pre-planning, planning, and operations.

### **Overview: Two layers of design**

Since 2014, ideas rooted in two different layers of design have emerged to incubate a co-designed school in which adults and youth create a new school together. Anderson developed and implemented the Participatory School Design curriculum within his technology education classroom from 2014 through 2019. He activated this curriculum with youth in the City of Madison to create a School Plan. McCabe studied Anderson's Participatory School Design and developed the Collective Co-Design Framework. This framework is described in Community | Learning | Design's curriculum,<sup>1</sup> and in McCabe's doctoral dissertation.<sup>2</sup> This layer is rooted in three core elements, which appear repeatedly throughout this proposal, and which form the frame around which Milestone Democratic School is built:

- Restorative Practices as a structure for learning and action,
- Deliberative Democracy as a process for decision-making, and
- Design as a collection of tools for action.

A final key component of our framework is a commitment to *iterative* processes: we recognize and celebrate the reality that “change is the only constant,” and that in order for Milestone Democratic School to flourish, core values must be held firmly while practices and applications intentionally emerge and adapt. As a result, *school design* will occur continually and repeatedly throughout the life of the school.

The second layer of design, *Iteration #1*, emerged through pre-planning of Milestone Democratic School. Iteration #1 did not develop organically, rather, Anderson reached out to school districts, youth services agencies, community organizations, and a myriad of other non-profit organizations in Dane County. Through systematically arranging meetings with community stakeholders, Anderson was provided with youth contacts and initiated co-design activities in August of 2018. A School Design Team, composed of youth and adults in partnership met for 10 weeks to collectively dream their ideal school. A consistent group of youth participated with Anderson to develop this new school. The School Plan<sup>3</sup> crafted by this team, describes three central possibilities:

- Learning that is engaging,
- A school where all voices are heard, and
- A preparation for each student's “next steps” in life.

This School Plan describes learning that is practical and community-connected, while also challenging and empowering. Safety, choice, accountability, and relationships are essential ideas that recur throughout the Plan, and as a result, this document.

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<sup>1</sup> “Participatory School Design for Participatory Democracy.” Available at <http://communitylearningdesign.org/Curriculum-PSD4PD.pdf>

<sup>2</sup> “Collective Co-design: An Intrinsic Case Study To Explore Participatory Design Theory As An Applied Framework With Middle School Students In A Public School.” (2018). Available at: <https://dspace2.creighton.edu/xmlui/handle/10504/120311>

<sup>3</sup> “Milestone Democratic School: A Plan for Engaging, Participatory, Future-Forward Learning - Iteration #1.” See Appendix.



## **1.00 SCHOOL DESIGN**

### **1.01 Provide the name of the proposed charter school.**

Milestone Democratic School

### **1.02 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**

Community | Learning | Design, Corporation, Inc.  
422 Leslie Dr  
Edgerton, Wi 53534

Directors:

Dr. Michael McCabe, EdD  
920-358-3002

[michael.mccabe@communitylearningdesign.org](mailto:michael.mccabe@communitylearningdesign.org)

Sean Anderson

773-480-1414

[sean.anderson@communitylearningdesign.org](mailto:sean.anderson@communitylearningdesign.org)

### **1.03 Identify how the school will operate as a legal entity under Wisconsin law.**

Community | Learning | Design, Corporation, Inc. (“CLD”), is a 501(c)3 not-for-profit corporation, registered with the Wisconsin Department of Financial Institutions as a Charitable Services Organization for Educational Services. Milestone Democratic School will operate as an entity of Community | Learning | Design as authorized and directed by the Board of Directors thereof.

### **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.**

The student body to be served will be made up of 14 to 18 year old youth, in mixed-age, small group advisories. To open, we project a minimum of 18 enrolled students. In the School Plan, our Design Team established a maximum of 200 students as the ideal size of a learning community, so MDS will cap enrollment at that number. The School Plan also calls for a limit of 20 students per teacher in most classes.

### **1.05 State the mission and vision of the school.**

The Design Team states, in the School Plan:

“By making this school, we are contributing to the creation of a different and better world. Our vision for this world is a democratic one, where everyone has a voice, and all voices are heard and respected.

Our mission is to bring this world into being, by helping people to:

- Find out who they are and who they want to be,
- Develop democratic skills and attitudes so they can share power in their communities, and
- Learn to think critically.”

1.06 State the core beliefs of the school.

The School Plan states:

“At Milestone Democratic School, we believe that:

- All people work and learn better when they feel emotionally and physically safe;
- Real, meaningful learning is always engaging;
- Everyone has the right to choose what they learn, when they learn it, and how they learn best; and
- Education must prepare us to succeed in this world as it is, and also help us develop the tools we need to make the world a better place.”

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

The Collective Co-Design framework which was used to generate the mission, vision, and core beliefs is itself a best practice grounded in research. Community | Learning | Design conducted reflective pilot applications of the framework in a middle school classroom on three separate cases; the final pilot application served as the research site for Dr. McCabe’s doctoral dissertation, which linked it with theoretical and research grounding in agency, participation, and engagement. In addition, the CLD directors workshopped the framework at three different professional conferences, refining the process at each to align it with best practices in each professional and scholarly domain: EduCon Philadelphia (hosted by the Science Leadership Academy, a project-based innovative charter school); Innovations in Participatory Democracy in Phoenix (hosted by the Participatory Budgeting Project); and the Participatory Design Conference in Hasselt/Genk, Belgium (hosted by scholars in the field, and with the conference theme of Participatory Design, Politics, and Democracy).

The mission crafted by the Design Team is well-aligned with research-based best practices in education:

Student-Identified School Design Essential	Best-practice Associated with Design Essential
Find out who they are and who they want to be	Restorative Practices, Personalized Learning
Develop democratic skills and attitudes so they can share power in their communities	Formal consensus (Butler and Rothstein 1987/2009), distributive leadership (Spillane, 2006)
Learn to think critically	Design-based thinking; student-directed project-based learning

The mission, vision, and core beliefs are also directly tied to the top five factors leading to student achievement as reported by Hattie (2009/2017):

1. Collective teacher efficacy,
2. Self-reported grades,
3. Teacher estimates of achievement;
4. Cognitive task analysis,
5. Response to intervention<sup>4</sup>

The learning environment at MDS will allow for students to work in professional environment where self-reported grades and cognitive task analysis are the norm. The collective co-design framework has been instituted to co-design a

<sup>4</sup> From: <https://visible-learning.org/hattie-ranking-influences-effect-sizes-learning-achievement/>

classroom (McCabe, 2018); and this instantiation of co-design with youth at MDS operationalizes collective teacher efficacy from the onset of the school design. Additionally, the Teacher Professional Practice administrative structure ensures that all faculty members at MDS are empowered to collaboratively create the most effective conditions for learning.

As the Design Team recognizes in their School Plan, the right to choose learning goals, methods, and pacing necessitates flexible and responsive assessment from guides and coaches. The Team is developing a protocol for weekly one-on-one feedback sessions. Initiating critical self-evaluation as outlined by the Design Team is an example of self-reported grades.

Finally, the focus at MDS on *design* as a set of tools for critical thinking, and *deliberative democracy* as a decision-making process are two examples of cognitive task analysis (Clark et al., 2007).

### **1.08 Note the unique aspects of the school and explain why the community needs this school.**

There are three unique aspects to Iteration #1 of Milestone Democratic School, as described in the School Plan:

1. Engaging learning built on student voice and community connection: The youth members of our Design Team, as well as every young person consulted during our action research, stressed repeatedly the importance of “learning what you care about, and caring about what you learn” (to borrow a phrase from one of our designers). The approach that the Team is developing to generate this engagement uses small-group advisory with one-on-one feedback, student-directed project-based learning, and community internships and “leaving to learn” to satisfy this demand. This approach will result in deeper learning across domains, and students who are more connected to their own learning and their communities.
2. Participatory, deliberative, democratic governance: Student voice as a contributor to academic engagement is expanded in this school design to include direct participation in governance. As the model democratic schools our Design Team studied show repeatedly, authentic democratic control over schools is an almost infallible contributor to legitimacy and shared ownership over school. When students, faculty, staff, families, and community members express direct, participatory control over their school, and when they do so in a format that ensures deliberation and critical examination of issues, then academic engagement increases, behavioral issues decrease, and community is built. School structure can also remain flexible and responsive, evolving to meet the needs of students and communities through ongoing democratic design. In addition, students who participate in school governance have an unparalleled first-hand learning experience in talking across difference, collaborative decision making, and creation through critical thinking -- learning outcomes that are invaluable and difficult to come by otherwise.
3. Personalized learning aimed toward specific skills and learning goals: The Design Team is very clear in their school plan that learning must be relevant, connected to real life, take into consideration the many different “starting points” of individual students, and the many different futures each student can envision for themselves. Additionally, many of our stakeholders were quick to highlight specific skills gaps that typical youth and high school graduates demonstrate. To address these needs, the Team has proposed a style of personalized learning in which students meet one-on-one with advisors, set goals aligned with specific standards-based learning outcomes, and then craft a plan that utilizes traditional classroom instruction, student-directed project-based learning, and internships with reflective analysis to meet those goals. When this style of teaching and learning is done effectively, as some of the model schools the Team analyzed demonstrate (the Met in Providence, RI; Sudbury Valley in Sudbury, MA; and Avalon School in St. Paul, MN), students grow towards their goals and acquire the skills that are valued by their communities.

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

The mission and core beliefs of Milestone Democratic School are rooted in our vision for *democracy* -- deliberative, participatory, shared decision-making. Accordingly, all decisions about our school have been made, and will continue to be made, through democratic processes. Our Design Team has crafted the initial concept for MDS through Formal

Consensus, and has established that day-to-day decision-making at the school will happen in a parliamentary School Meeting, where all members of the school community (teachers, staff, and students) will set policy. In addition, the reiterative nature of our school design ensures that periodically (at least once per year), a Design Team will be selected to evaluate, revise, and refine the design of MDS through deliberative Formal Consensus. (See section 2.06 for an explanation of School Meeting and School Design.)

#### **1.10 Characterize the school culture desired for the school and how this culture will be established.**

The Design Team describes our target culture in the School Plan as:

“We want students to enjoy coming to school and feel the vibe - with positive feelings we think students will be encouraged to do work and to learn. We know that we can make students feel emotionally safe and welcome by: having a diversity of ethnicities, races and religions in our teaching staff and student body; giving people frequent time to reflect, with breaks in learning and chances to work at different speeds and times; having flexible and comfortable spaces; using Restorative Practices, like circles and values-based decision-making, whenever possible.”

Further, the School Plan indicates that:

“The way our school will make sure that everyone feels safe, comfortable, and respected when making their voices heard is having daily circles, along with check-ins... It will be a place where you feel more comfortable and feel that you know, by not being too big and not too small, but comfortable and inviting.”

#### **1.11 Describe the process that will be used to develop an initial strategic plan.**

The Design Team (consisting of the School Developer, Governance Board President, Development Committee, and Youth Design Cohort) will meet throughout the Planning Year (2019-20) to develop a 5-year strategic plan. One core element of the school design, as published in the School Plan, is the emphasis on *iterative* design, which requires that the school itself undergo intensive participatory evaluation and assessment relative to its Mission, Vision, Possibilities, and Criteria. This regular (annually, at minimum) evaluation provides an opportunity to refine and revise the school design according to successes and challenges observed and analyzed, through a democratic consensus process of the school community. Our 5-year strategic plan will be center on this process of iterative design.

## **2.00 GOVERNANCE AND LEADERSHIP**

### **2.01 Identify the organization and individuals involved in the development of the school.**

The school is being developed by two entities of Community | Learning | Design.

The School Governance Board, an executive committee created by unanimous consent of the Board of Directors of CLD, is comprised of:

- Michael McCabe - Governance Board President
- Sean Anderson - School Developer
- Corey Livieri - Member at Large
- Victoria Zupancic - Member at Large
- Phill Klamm - Member at Large

The Development Committee, a sub-committee created by the Governance Board, is comprised of all the members of the Governance Board, and in addition:

- Evan Bacalao - Open Society Foundation
- Ryan Batkie - Shipley School; UW-Madison
- Karla Haas Moskowitz - Teach & Lead, LLC; Goddard College
- Greg Londe - Cornell University
- Danielle Roti - Ardmore Elementary School
- Erin Trondson - Woodland Montessori School

Finally, the Design Team for the school, responsible for research, ideation, and development of plan for the school, is comprised of the School Developer plus:

- Jurie Mayo, age 19, student at Madison Area Technical College
- Malik McDonald, age 13, student at Badger Rock Middle School
- Adan Oviedo, age 17, student at LaFollette High School and Operation Fresh Start
- Devika Pal, age 13, student at Badger Rock Middle School
- Gersely Rios, age 13, student at Badger Rock Middle School

### **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.**

All members of the Governance Board, Development Committee, and Design Team were selected because of their unique experiential expertise: voices of school administrators, secondary and post-secondary teachers across a variety of content areas, non-profit organizations, and youth ensure that all decisions are interrogated from a wide variety of perspectives. More specifically, the Governance Board President and the School Developer each have particular skill-sets established through their careers in education that make them effective guides for the organization:

#### **1. Organizational skills**

Michael McCabe (Governance Board President) has developed organizational skills including budgeting, human resources management, and effective communication as principal of both private and public schools, a founder of an instrumentality charter school, and a coordinator in an alternative educational program. His Ed.D. in Interdisciplinary Leadership from Creighton University focused on bringing student voice into decision-making.

Sean Anderson (School Developer) learned project management and collaborative decision-making in the private sector as he developed a career in construction and manufacturing. He subsequently brought these skills to organizational leadership as a program developer for Career and Technical Education and as a department leader in Design and Technology Education.

#### **2. Collective Co-design skills and experience**

Specific skills are needed to guide youth through the critical and creative work of democratic school design, and as authors and developers of this protocol, the Governance Board President and School Developer are uniquely qualified for this work. Both trained with the YWCA Madison in Restorative Practices, and have used restorative elements like circle practices in their own teaching and leading for many years. Both have experience with participatory governance in and outside of the education sector, with Anderson especially honing his skills in consensus-based decision making in the non-profit and community-organizing worlds. Finally, the practice of design has been a key aspect to both McCabe's and Anderson's work as educational professionals, utilizing this critical framework as an approach to developing individual courses, educational programs, and full schools. Since the founding of Community | Learning | Design, the two have continued to grow into these skill-sets by presenting panels and workshops at professional conferences, including EduCon, Innovations in Participatory Democracy, and the Participatory Design Conference. Michael's recently-completed doctoral dissertation for Creighton University's Interdisciplinary Leadership program was based in an intrinsic case study of Collective Co-design, and resulted in the development of this framework.

### **3. Specific skills and experience for MDS Iteration #1**

Finally, the specific educational programming that is described in the School Plan itself requires a particular set of aptitudes. McCabe and Anderson have each gained extensive experience in work-based learning and student-directed project-based learning, participatory governance and decision-making, and personalized learning. As teachers in Career and Technical Education, Alternative Education, STEAM, Tiered Learning, and Project-Based Learning programs and schools, they have build careers on precisely these skills.

## **2.03 Describe the board that will be created to lead the school.**

The Governance Board for Milestone Democratic School is an executive committee of the non-profit Community | Learning | Design, Corporation, Inc. that has been authorized by the Board of Directors to conduct three primary purposes: 1) support the mission, vision, and raise the profile of the school; 2) raise funds for the school; and 3) oversee the Teacher Professional Practice (TPP) to ensure that that the master charter agreement between the authorizer and the school is upheld. The role of the Governance Board during operations is to support the school's goal of building agency in students via authentic democratic control of their institution, and as such, the Board serves in an oversight and authorization capacity for the decision-making authority of School Design and School Meeting, where operations decisions are made, and the Teacher Professional Practice, where operations decisions are executed.

## **2.04 Describe the process to be used for the selection of board members.**

Upon opening, there will be a student delegate, a family/guardian delegate, and a delegate of the Teacher Professional Practice that sit as voting members on the board. At least one member of the board will be a licensed Special Education teacher.

All board members serve two-year terms. Each year begins July 1 and ends June 30. Board members are appointed by the Board of Directors of CLD with input from School Design and all members can serve two consecutive terms.

## **2.05 State the general duties of board members.**

All board members will exercise three mandated duties:

1. Duty of Care: Ensure prudent use of school resources
2. Duty of Loyalty: Center the mission of democratic education in all decisions made by the Board
3. Duty of Obedience: Monitor the school's actions, including operations decisions made at School Design and School Meeting, to ensure compliance with bylaws, the Master Charter Agreement, and State and Federal law



**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).**

Governance of Milestone Democratic School will be expressly delegated by the Board to two sites:

1. School Design: an intensive, delegate-driven process of establishing foundational documents, concepts, and plans for the school (including the mission and vision of the school, curricular and instructional programming, assessment and evaluation processes, and the handbook). School Design will take place at least once per school year, or more often as requested by School Meeting. Membership in the Design Team will include at least one delegate of the Teacher Professional Practice, and at least six delegates from the student body, in an intentionally diverse and representative selection process to be determined by School Meeting. School Design will apply the Collective Co-Design framework, and will follow Community | Learning | Design's curriculum for Participatory School Design, which features requirements for stakeholder input, including parents and community representatives.
2. School Meeting: a weekly open meeting in which all members of the school community (students, faculty, and staff) are invited to participate in parliamentary decision-making and policy-setting (including rules, operations decisions, and oversight of conflict resolution and justice proceedings). School Meeting will follow a modified form of Robert's Rules of Order, and binding decisions will be made by simple majority. Parents and community members will have an open invitation to attend School Meeting, and to express their thoughts and opinions at the invitation of the Chair, but will not have voting power.

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

As discussed in section 2.06, all policy will be established by School Design and School Meeting. The role of the board will be to provide oversight to these sites of policy-making, and to ensure that all policies set are in accordance with the Master Charter Agreement, State and Federal laws, and the mission and vision of Milestone Democratic School. Any decision reached by School Design or School Meeting which is found by the board to be out of compliance with any of these constraints will be sent back for reconsideration.

The board will also present proposals to School Design and School Meeting, as it deems necessary and appropriate, to be decided upon by the democratic processes of those bodies.

To ensure that the principles and values of democratic self-management are practiced at the staff level as well as the school level, the board will likewise authorize the Teacher Professional Practice to make all decisions pertinent to work hours, conditions, duties, and benefits, by whatever method the TPP deems appropriate. The board will provide oversight to these decisions, again, to ensure compliance with Agreements, laws, and the mission and vision of the school.

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

By-laws for the School Governance Board of Milestone Democratic School are presently being drafted by retained counsel, and will be available once approved by the Board of Directors of Community | Learning | Design.

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

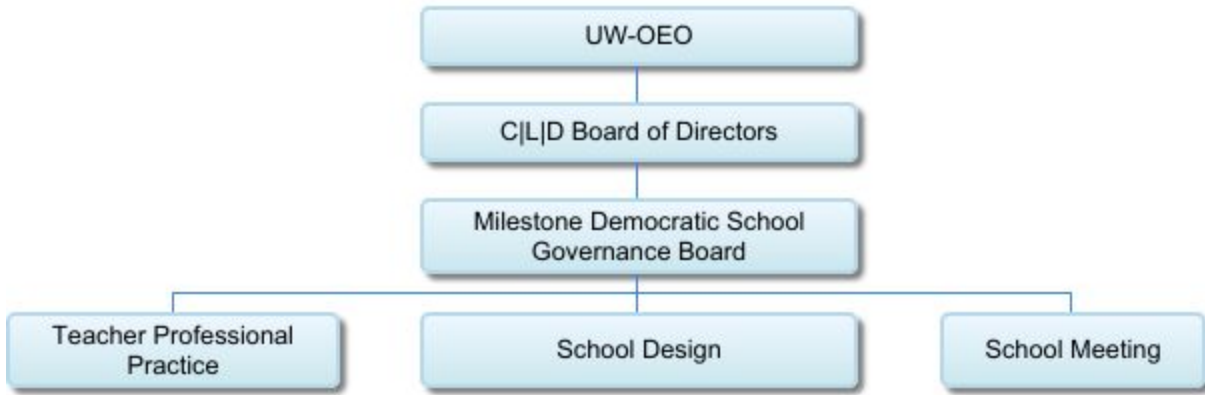
See attached Appendix: Wisconsin Department of Financial Institutions, Form 102-Nonstock Corporation Articles of Incorporation

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

The present membership of the Governance Board of Milestone Democratic School is:  
Michael McCabe - President and Chairperson. (Principal - Brookwood Middle School; former project-based learning advisor)  
Corey Livieri - Secretary. (Madison resident; At-Risk Teacher - Janesville School District; former technical college advisor)  
Phill Klamm - Member at large. (Principal - Walworth Elementary and Middle School; former at-risk program leader)  
Victoria Zupancic - Member at large. (Secondary mathematics teacher - Lahainaluna High School, Lahaina HI, former AVID coach)  
Sean Anderson - Member at large and School Developer. (Technology Education Teacher - Edgerton Middle School; former at-risk program designer)

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

The Board of Directors of Community | Learning | Design (“CLD Board”) is seeking authorization from the University of Wisconsin’s Office of Educational Opportunity to open this school. The CLD Board will be responsible for upholding all tenets of the Master Charter Agreement negotiated with OEO. The CLD Board has authorized the Milestone Democratic School Governance Board to (1) support the mission, vision, and raise the profile of the school; (2) raise funds for the school; and (3) oversee the Teacher Professional Practice (TPP). Accordingly, the MDS Governance Board will authorize School Design to periodically evaluate, revise, and refine the fundamental documents, concepts, and plans for the school. The MDS Governance Board will also authorize School Meeting to make regular operations decisions, including setting policy and guidelines. The MDS Governance Board will, finally, authorize the Teacher Professional Practice to make all decisions regarding working conditions. If conflict arises between School Meeting, School Design, and the TPP, the MDS Governance Board will act as an arbiter to resolve conflict and seek resolution, or to retain an independent entity to facilitate resolution as appropriate and within the bounds of the mission and vision.



**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)).**

The Governance Board President is Michael McCabe. He is licensed by the State of Wisconsin as a superintendent, principal, and teacher. He has professional experience managing private, public, and charter schools. As Governance Board President of a democratic school committed to participatory governance, his management will focus on overseeing the various democratic bodies (School Meeting, School Design, Teacher Professional Practice) to ensure compliance with the Master Charter Agreement, State and Federal law, and the mission and vision of the school.

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

As a “teacher-powered” school, directed by democratic bodies of students, teachers, and staff, there will not be a director or principal. Instead, in keeping with the participatory commitments of the school’s mission, the teachers at MDS will be members of a Teacher Professional Practice. This model of school ownership calls for teachers To act as owners of a school, in a similar manner as lawyers are owners of a law firm (Dirkswager, 2002). Teacher professional practice refers to a teacher-led school model, which is organizationally flat and which requires collaborative decision-making and distributed leadership. Accordingly, teacher hiring will be contingent on candidates demonstrating interest and aptitude for this style of school leadership.

**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.**

The school will be operated by Community | Learning | Design, Corporation, Inc. This 501(c)3 educational services organization will serve exclusively as an authorizing agent for the School Governance Board, which will operate as an executive committee of CLD. The Board of Directors of CLD will be responsible for oversight and management to ensure the Master Charter Agreement is upheld.

### **3.00 COMMUNITY AND FAMILY ENGAGEMENT**

#### **3.01 Describe the community the school will serve.**

The student population of Dane County, where Milestone Democratic School will be located, is racially and ethnically diverse, constituted by 5.7% Asian students, 9.5% Black students, 11.9% Hispanic/latinx students, and 5.8% Two or more races. Poverty, as measured by free and reduced lunch program enrollment (notably an under-representation of actual, lived economic disadvantage), is indicated as 27.6% eligible for free lunch, and 3.3% eligible for reduced lunch. English language learners are also a significant, and significantly disadvantaged, group in Dane County, with 13.4% students with limited English proficiency.

A key concept in democracy is equal access and representation - but so, too, is privileging of minority voice and perspective in the interest of preventing a “tyranny of the majority.” For these reasons, and also because the ongoing process of school design in the interest of building a more democratic world requires voices of critique, Milestone Democratic School will intentionally seek to serve those communities in the Dane County who are not presently well represented in systems of power. MDS will seek to serve youth of color, immigrants and migrants, English-language learners, youth in poverty, LGBTQ youth, and other young people who are disconnected, disengaged, and disinvested from their education. As a first step towards this inclusion and a move towards equity, our Design Team responsible for Iteration #1 of the School Plan is made up precisely of young people from these communities.

In a broader sense, MDS intends to serve the community of educators in Dane County and beyond, by demonstrating that even within the constraints of public education, authentic student voice and shared decision-making are not only possible, but they result in deep and meaningful engagement in learning. Similarly, MDS intends to serve the communities of educators, practitioners, and theorists who are already committed to learning rooted in Restorative Practices, democratic deliberation, and design, by providing a site where these concepts are practiced, refined, and tested. Finally, MDS seeks to serve all the communities of Dane County, by providing a site where members of many overlapping communities can come to learn democratic empowerment, and bring those skills back to their own institutions, politics, and civic life.

#### **3.02 Explain how the community has been involved in developing the school.**

Upon receiving initial authorization from OEO, Community | Learning | Design created an organizing, outreach, and recruiting plan to begin connecting with our communities. We made strategic lists of organizations already serving youth, and groups whose vision and values matched our own. Over the summer of 2018, we held face-to-face listening sessions with twelve organizational leaders, with the purpose of requesting endorsements as members of our Sponsoring Committee, and asking for references and recommendations for youth applicants to our Design Team. Based these meetings, we collected a Sponsoring Committee with many committed and encouraging signatories (see attached Appendix: Sponsoring Committee). We also reached out to our communities of practice, in the worlds of democratic education and design, for additional input and endorsement.

Based on these meetings, CLD was invited to give direct presentations to gathered youth in four different locations (Operation Fresh Start, Badger Rock Middle School, the Catholic Multicultural Center, and GSAFE Wisconsin - unfortunately scheduling didn't allow for GSAFE to follow through with our meeting). We described our project, distributed invitations to apply, and had one-on-one and small-group dialogues about school design. From these meetings, we collected applications for our Design Team, conducted interviews with applicants over the phone, and consulted with their families. The School Design Team, with six of seven enrolled Designers present, held its first design session on Sunday, October 7th.

As the team worked through CLD's Participatory School Design curriculum, we came to the phase of design requiring input from “Youth Not In The Room, Stakeholders, and Experts” in order to help us develop design criteria. To accomplish this, the team brainstormed the roles and groups we wanted to reach out to, and then used personal, social, familial, and neighborhood networks to conduct “listening sessions” with these folks. Over a three week timeframe, each member of the Design Team recorded a series of these sessions, asking for input and advice on our developing

school design plan, and collecting stories. Twenty-one such listening sessions were conducted and documented, in person, by Skype, and occasionally by email. This practice created a significant body of community input on the school design, which the team then filtered and sorted according to our mission.

### **3.03 Explain how the community will be involved in the operation of the school.**

The Design Team describes how the community will be a site for and a contributor to learning at Milestone Democratic School:

“MDS will work with the community by making internships a part of every student’s school week. Also, we will use community experts to help advise projects, which will help the student to feel an affinity with people that they already know as well as people they have never met before.”

The community will also have continued opportunity to contribute to the iterative design of the school, as every time School Design convenes, there will be repeated requirements to collect listening sessions from stakeholders.

### **3.04 Describe community partnerships the school will have or hopes to have.**

Milestone Democratic School intends to develop partnerships with youth service organizations that align with our mission and vision, and who serve the young people we are targeting for enrollment. Some of these relationships are already initiated, and some will be developed after authorization. Key partners for us will include Centro Hispano, Urban League, Briarpatch Youth Services, YWCA, GSAFE, Freedom Inc, and Disability Rights Wisconsin.

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

Community relationships will be critical to our instructional methodology of personalized learning, work-place learning, and Student-directed Project-Based Learning. By building robust and mutually-beneficial partnerships with employers, non-profits, and local and state governmental agencies, we will be able to provide meaningful out-of-school learning opportunities. Maintaining these organic relationships with our communities will also ensure a positive word-of-mouth reputation for MDS to attract students.

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

By building Milestone Democratic School around student voice and design, youth preference and expectations will always take precedence. In School Design and School Meeting, those preferences will be subject of deliberation along with staff and faculty preference and expectation. Family and community stakeholder input is also a part of School Design and School Meeting (as described in sections above), though it is filtered through the youth-adult democratic processes at MDS, ensuring that the learning community always feels empowered to guide its own path.

## **4.00 MARKETING, RECRUITMENT, AND ADMISSIONS**

### **4.01 Describe the marketing program that will be used to inform the community about the school.**

The primary marketing tool for Milestone Democratic School will be relationships that CLD has already built with a large network of local community organizations in and around Dane County. These organizations, along with the young people we are already working with, and the parents and families who are supporting this work, will help facilitate the best word-of-mouth campaign to reach the communities we're looking for. In addition, we will launch a supportive campaign of press releases, carefully curated social media messaging, and traditional advertising in community publications. All of these approaches will serve to invite families, communities, and potential partners to diverse community dialogues, frequently held in and around Madison.

Marketing materials will be produced by a professional graphic designer, who presently serves on our Development Committee, with the participatory input of the youth Design Team.

### **4.02 Explain how students will be recruited for the program.**

We will rely heavily on the community partners we have already built relationships with, and those we aspire to partner with, to spread word about Milestone Democratic School. In addition, we will use traditional media, social media, and community media to do direct outreach to students and families. The recruiting message will focus on youth voice and empowerment within a student-designed democratic school setting - a message which has already resonated exceptionally well with the youth on our design team and others.

### **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).**

We will prominently celebrate the racial and ethnic diversity of the Design Team that created the School Plan to gain legitimacy within communities of color in Dane County, and to initiate recruitment directly in the communities our Designers represent. Ethnic and racial diversity at Milestone Democratic School will be emphatically claimed as a core strength in our participatory design and democratic practices, as we seek to make school representative and equity-centered.

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

Our democratic vision, mission, and values instruct us: "All who come will be welcomed." During the first year, we will aggressively recruit until we reach our target population of between 64 and 100 students. All applicants will submit an application, asking them to reflect on themselves and their learning to date. Follow-up interviews will be conducted to communicate clearly the value and responsibilities of enrolling in Milestone Democratic School, and students will be invited to enroll during interviews. Enrollment will be handled by the School Governance Board or a designated committee thereof, and will utilize enrollment management services to a company such as SchoolAdmin.com and a website such as Apptegy.

Subsequent years' enrollment will be similar, up til MDS reaches its capacity of 200 students.

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

In the event that more students apply than there are available seats, MDS will hold a public random drawing to determine enrollment. The public random drawing will be handled as a single weighted drawing. Enrolled students will

be treated as if they are exempted from the lottery and guaranteed enrollment in the following school year. In addition, siblings of existing students will be exempt from the lottery, as will children of paid staff of School #1 (subject to not exceeding 10% of student enrollment). After these exemptions, weighting in the single random drawing will be determined in a manner consistent with state and federal provisions.

## **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.**

Milestone Democratic School will build off of established best practices for educating educationally disadvantaged youth. Collective teacher efficacy is a critical component of establishing a high quality school. MDS will recruit faculty and staff according to the criteria established by the Design Team:

“The teachers in this school will be empathetic, have diverse backgrounds, have had experience with trauma, and support democratic agency of their students. Teachers will have democratic agency also, to make sure that MDS recruits and retains the best staff possible. Teachers will be hired by the Design Team based on their ability to have empathy and relate to youth. The Design Team will intentionally recruit diverse teachers, with a focus on teachers of color and teachers from different countries around the world. At least some of the teachers should always be young people. The first role teachers will fill is as advisors to small groups, who coach their advisories on projects and internships. The advisors will also teach classes that are requested in School Design and School Meetings.”

Community | Learning | Design is developing relationships with colleges well-known for progressive teacher education programs, including Arcadia University, Goddard College, and Antioch University, to begin developing pre-service experience opportunities and an eventual pipeline for new teacher graduates.

The primary recruiting tool for staff will be the indication that all teaching and advising faculty hired will join the Teacher Professional Practice. The attraction of democratic agency as a teacher will draw the high quality applicants that MDS will require. Professional development after hiring, and ongoing throughout a teaching career at MDS, will be robust and specific to the unique needs of our school.

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

Just as we believe that students will do their best work and learning in an environment that is emotionally safe, and that a school built on restorative, participatory design will always create that safe environment, so too do we believe that teachers will do their best work in a democratic, restorative environment. Our own experiences as educators, as well as data and information available from groups like Teacher-Powered Schools, confirms this.

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

The three core practices of Collective Co-design will form the foundation of staff education and teacher training. Milestone Democratic School will utilize the local expertise of the YWCA Madison to initiate training in Restorative Practices for faculty, and deeper study will be organized with the International Institute of Restorative Practices. Training in deliberative, democratic practices will be facilitated in partnership with regional and national organizations such as the Jefferson Center, the Center for Public Deliberation (CSU), and the Participatory Budgeting Project. Professional development in design will be connected with the local knowledge of UW Madison’s School of Human Ecology, and deepened by connections with Stanford’s d.school and Parson’s School of Design.

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

As a flat organization with distributed leadership, the Teacher Professional Practice of Milestone Democratic School will operate under the same premises that guide our vision for democratic, connected learning for students. By guaranteeing autonomy and agency, and through Restorative Practices like frequent staff circles, teachers and



employees at MDS will be deeply engaged in their work and the authentic, meaningful learning that this work necessitates.

**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).**

The commitment made by the Design Team to intentionally recruit and retain diverse teachers from many different backgrounds and places of origin will present some challenges regarding licensure, which the Governance Board will anticipate and be prepared to handle. The Board, working with support from our authorizer, will use every available option presented under Wisconsin law to ensure that all teaching staff are fully and appropriately licensed for the instructional duties they are assigned.

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

Concurrent with facilitating the participatory design of Milestone Democratic School, Community | Learning | Design has been developing collaborative relationships with:

Design faculty at Washington University, St. Louis (Alix Gerber)

Director of Center for Public Deliberation, Colorado State University (Martin Carcasson)

Parsons School of Design, New York (Scott Brown)

School of Human Ecology, UW Madison (Connie Flanagan)

Adams State University, CO (Karla Haas Moskowitz)

These relationships are being cultivated to help inform our practice, advise in School Design, and connect our students to higher education opportunities which align with our own mission and vision (including dual-credit articulation agreements). Authorization from UW-OEO would allow us to fully develop these relationships.

In addition, we have established connections with faculty from Arcadia University (Marc Brasof) and Goddard College (Karla Haas Moskowitz), which are well known for their teacher training programs that align with our own mission and vision, to facilitate the recruitment of teachers.

## **6.00 CURRICULUM AND INSTRUCTION**

### **6.01 Describe the educational program of the school (118.40(1m)(b)3).**

The most important aspect of Milestone Democratic School's educational program is its iterative, participatory design. Created to be intentionally flexible and responsive, and to operate on active, deliberative, democratic input from students in dialogue with teachers and communities, the "plan for the experience" of MDS (to use Pinar et. al.'s prime definition of "curriculum") is in the governance and ongoing redesign of the school itself. By building the experience of MDS around weekly School Meetings, and periodic School Design sessions, we will ensure that students will have frequent and meaningful opportunities to learn-by-doing Restorative Practices, democratic deliberation, and design thinking. As we develop the culture of MDS, these practices and values will also flow into other, more day-to-day elements of the school's practice. As a result, crucial but elusive skills such as talking across difference, collaborative decision-making, and creation through critical thinking, can be learned, assessed, and evaluated through participation in the daily life of the school.

In addition to this bedrock educational program, the particular design elements of "Iteration #1" of MDS, as adopted by consensus of the Design Team and published in the School Plan, describe an experience of learning that is relevant, community-connected, and personalized. Utilizing small group advisories, students and faculty will co-create individual learning plans for each student, aligned with the specific learning goals that make up MDS's graduation requirements. These plans will draw reflect an individualized balance of traditional classroom instruction, student-directed project-based learning, and work-based learning through internships. Assessment and evaluation take the form of weekly one-on-one feedback sessions with advisors, and the curation of artifacts for authentic assessment towards standards.

### **6.02 Identify the content of the instructional program.**

In order to be effective in School Meeting and School Design, students need to have proficient skills in Restorative Practices (values-based decision making, circle protocols); deliberative, democratic decision-making (preparing and making proposals; expressing questions, opinions, and concerns; and resolving concerns); and design thinking (identifying possibilities and using a rational process to develop them).

The Design Team will establish a series of specific learning objectives around these three core proficiencies, detailing the skills to be demonstrated for mastery.

Additional proficiencies identified by the Design Team, which will similarly be developed into continuums of specific learning objectives, include:

Critical and divergent thinking

Social and emotional health and well-being

Understanding of self and ability to set goals

Skills-centered applications of math, science, reading, writing, geography and history

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

According to the School Plan, the core instructional method will be the personalized learning plan, designed collaboratively between each student and their advisor. Each learning plan will identify overall Academic and Career Planning goals for the student, as well as the intermediate steps and social-emotional learning targeted to make progress towards those goals. Learning plans will be revised and refined periodically (at least once per term). The objective of these Learning Plans is to be as flexible and responsive to student needs as possible, while also providing a medium for accountability and an opportunity to push students toward high expectations.

Along with specific learning goals to be met within each Learning Plan, plans for the method of learning will be detailed. According to the Design Team's School Plan, preferred instructional methodology include student-directed

project-based learning, collaborative design projects, work-based learning projects developed at internship sites, asynchronous online learning, and direct-instruction classes provided by MDS staff and/or at partner institutions by articulation agreement (including potentially UW Madison, Madison College, community arts partners, and private providers). As advisors build Learning Plans with each of their advisees, their instructional methodologies will emerge and develop. Flexibility on the part of advisors will be paramount.

#### **6.04 Explain how chosen instructional content and methodology will achieve the school's objectives.**

The objectives of the Milestone Democratic School are to develop critical thinking, self-reflectiveness, and democratic aptitudes in learners so that they may contribute to a more just and equitable world. In order to learn democratic values and principles, learning itself must be democratic. The instructional methodology described above, which is both highly personalized but also deeply connected to communities, is a democratic expression of teaching and learning. The central premise of deliberative, participatory democracy is the unfolding of individual freedom within responsibilities to community - the content and method of learning at MDS reflects this.

#### **6.05 Describe the research that supports this approach to educating children.**

In a recently-published dissertation, Dr. Suzanne K. Barker provides a literature review of the research supporting “student voice” as a key contributor to effective learning.<sup>5</sup> Citing Bron and Veugelers (2014), Barker identifies five research-based rationales for centering student voice in schools:

1. Normative: As indicated by the UN Convention on the Rights of the Child (and various scholars cited by Barker), children have a right to participate in the decision-making that affects their own education.
2. Developmental: Students have a cognitive need to express agency and assume responsibilities, particularly as they age through schooling.
3. Political: Including student voice is an effective strategy for representing the views and meanings of subordinate cultures, which are often insufficiently expressed by the dominant culture in schools. There is an issue of power at play whenever decisions are being made, and student voice allows power to be flattened in schools, while also providing a learning opportunity in civic and political engagement.
4. Educational: Citing Wagner (2008) and Soulé & Warrick (2015), Barker describes the learning that is critical to contemporary success in life, focusing on social and emotional learning, including communication and collaboration aptitudes, as well as development of problem-solving and critical thinking skills. Student voice gives unparalleled opportunities to rehearse, refine, and develop these skills in an authentic, meaningful setting. She also cites research (Ngussa and Makewa, 2014) showing that student voice increases engagement, attendance, and learning across domains, not simply the citizenship skill-building most obviously connected to student voice.
5. Relevance: Barker cites multiple scholars whose research centers on the lived, experiential expertise of students within the domain of learning. Program designers, teachers, and school leaders often have an “expert blind-spot” which prevents them from fully understanding the experience and needs of students within schools. Including student voice in school design ensures that the plans for learning that are developed are deeply relevant to the learners who will engage with them, resulting in increased motivation, engagement, and achievement.

The particular form of student voice at MDS, as represented by the Collective Co-Design Framework, also has a rich body of research supporting its three distinct areas. *Restorative Practices*, as an exemplar of “Social-Emotional Learning,” have been shown in meta-analysis to have positive long-term impact on academic achievement.<sup>6</sup> *Democratic deliberation and governance* have also been linked to broad improvements in academic skill-building,

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<sup>5</sup> Barker, Suzanne, "Student Voice to Improve Instruction: Leading Transformation of a School System" (2018). Digital Commons @ACU, Electronic Theses and Dissertations. Paper 112.

<sup>6</sup> See, e.g., Taylor, R. D., Oberle, E., Durlak, J. A. and Weissberg, R. P. (2017), Promoting Positive Youth Development Through School-Based Social and Emotional Learning Interventions: A Meta-Analysis of Follow-Up Effects. *Child Dev*, 88: 1156-1171. doi:[10.1111/cdev.12864](https://doi.org/10.1111/cdev.12864)

including in research conducted by experts that consulted with our Design Team: Nicole Zillmer's PhD research indicates strong correlation between "intellectual collaboration," such as debate and dialogue around shared decision-making, and cognitive development; and Marc Brasof's extensive research identifies the broad academic benefits of including student voice directly in school governance.<sup>7</sup> Utilizing *design* as a framework for critical thinking has also been shown to positively impact student learning, cognitive development, and skill-building in problem-solving.<sup>8</sup>

Finally, CLD's co-director Michael McCabe recently completed an intrinsic case study at one iteration of Participatory School Design in a public middle school, which provided the research site for his dissertation in Interdisciplinary Leadership at Creighton University.<sup>9</sup> This qualitative study resulted led to the development of a framework which has five evidence-based components and two theoretical extensions. This "Collective Co-Design Framework" forms the foundation of Milestone Democratic School.

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

Two unique aspects of the program design are intended to serve students with disabilities effectively. First, following the underlying concept of "Universal Design for Learning," the personalized, democratic educational program of Milestone Democratic School creates individual learning plans for all students. In effect, *every* student at MDS has an "IEP" developed in partnership between educators and students, identifying strengths, needs, and the best learning methodologies for each student. The Project-Based Learning that the Design Team identifies as a core strategy to meet learning goals in student plans has been celebrated as a highly effective model for inclusion, differentiation, and embedding of goals for students with special needs. Second, the ability for youth with disabilities to directly participate in school governance will result in a school which is more directly accessible, challenging, and rewarding for those students as much as any other.

To ensure that these goals are being met, at least one member of the School Governance Board will always be a licensed Special Educator (presently our Governance Board President), and the Teacher Professional Practice will strive to include at least one licensed Special Educator at all times.

#### **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.**

Inclusion of English language learners in the participatory design of Milestone Democratic School is the primary strategy for ensuring that the needs of these students are met. Already this strategy has paid off, as one member of our Design Team is a recent immigrant with limited English proficiency, and her contributions to the design have included the insistence on personalized learning plans, which allow students to develop goals for language development as well as inclusive and accommodating strategies for approaching other learning goals.

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<sup>7</sup> See Zillmer, Nicole Suzanne, "Metacognitive dimensions of adolescents' intellectual collaboration" (2016) and Brasof, M., & Mansfield, K.C. (2018). Student Voice and School Leadership [Special Issue]. *Journal of Ethical Educational Leadership*.

<sup>8</sup> Hawthorne G. et al. (2014) Impact and Sustainability of Creative Capacity Building: The Cognitive, Behavioral, and Neural Correlates of Increasing Creative Capacity. In: Leifer L., Plattner H., Meinel C. (eds) Design Thinking Research.

<sup>9</sup> McCabe, Michael, "Collective Co-design: An Intrinsic Case Study To Explore Participatory Design Theory As An Applied Framework With Middle School Students In A Public School." (2018). Available at:

<https://dspace2.creighton.edu/xmlui/handle/10504/120311>

## **7.00 STANDARDS, ASSESSMENT, AND ACCOUNTABILITY**

### **7.01 Describe the standards on which the educational program will be based.**

The Design Team has established that learning goals should be centered on skills development over knowledge acquisition. During planning, the Design Team will identify standards and develop continuums of specific learning goals in the following domains, and beginning with the following likely sources:

- Design: International Society for Technology in Education; International Technology and Engineering Educators Association
- Social and Emotional Learning: CASEL Core SEL Competencies; P21 Framework for 21st Century Learning
- Democratic deliberation: Wisconsin State Standards for Social Studies, special emphasis on Inquiry standards
- Health and wellbeing: CDC Health-Related Quality of Life (HRQOL)
- Math: Common Core State Standards, special emphasis on Standards for Mathematical Practice
- Science: Next Generation Science Standards, special emphasis on Science and Engineering Practices
- Reading and Writing: Common Core State Standards for English Language Arts
- Geography and History: WI State Standards for Social Studies

### **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).**

Authentic assessment of student performance, as documented in a digital portfolio or similar tool, will be assessed by advisors against the specific, standards-based learning goals the Design Team crafts during planning. Progress toward individual goals, and toward graduation requirements, will be self-assessed by students and monitored by advisors, and will form one important component of learning plans.

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

The Design Team, as they identify standards and craft continuums of specific learning goals, will set graduation requirements using these learning goals. Course equivalency for learning goals will be analyzed, and stakeholders in higher education and career pathways will be consulted as a part of design.

### **7.04 Define how the results of the educational program will be assessed.**

School Design, conducted at least annually, will be charged with evaluating the effectiveness of the educational program, using the Possibilities Statement, Criteria, and Constraints of Iteration #1 of the School Plan as benchmarks. Revision, refinement, and redesign will be based in this annual assessment, unless called for earlier by School Meeting.

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

During the first five years of operation, 100% of Milestone Democratic School students will demonstrate growth and improvement in specific learning goals aligned with Social and Emotional Learning, Democratic Deliberation, and Design, as measured along continuums by self-assessment and by advisors. Further achievement goals will be set by the Design Team as they develop learning goals and continuums.

### **7.06 Describe how the school will ensure the quality and availability of needed data and information.**

Qualitative assessment of authentic student performance, as aligned with continuums of specific learning goals, will be documented and curated in a digital portfolio for each student or similar.

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

The Design Team will analyze the standards and create continuums of specific learning goals (similar to competencies, or proficiencies). Advisors and students will use these learning goals to create learning plans for each student, each term. Assessment and evaluation of successful student learning will be documented and curated in students' digital portfolios or similar tool.

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

Ongoing, iterative, participatory design will be the performance management system. At least annually, a delegated Design Team of teachers, students, and staff, in consultation with families and community stakeholders, will evaluate the performance of Milestone Democratic School. The benchmarks for evaluation will be Design Criteria and Constraints of the current iteration of the design. Revisions and refinement to the school design, including curricular and instructional programming as well as assessment methodology, will be made in accordance with the evaluation made by the Design Team.

**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.**

Milestone Democratic School will operate on a modified year-round calendar. The calendar will include a three-week summer break, a three-week winter break, a two-week fall break, a two-week spring break, and periodic short breaks for professional development and inservice learning. There will be 190 days of instruction throughout the year. The school day will be from 8:00 am til 3:30 pm, but with flexibility to accommodate student internships' earlier start times or later end times.

Because of the personalized nature of instruction at MDS, subject-by-subject accounting of minutes of instruction is impossible. Each student, when designing a learning plan with their advisor, will determine the nature and methodology of learning tasks they will engage in during that term.

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

Educators will engage in a rigorous program of professional development to ensure they are well prepared for the unique aspects of teaching at Milestone Democratic School. Training in Restorative Practices, Democratic Deliberation, and Design will be required for all educators, utilizing community partners and established experts in these domains.

## **8.00 EDUCATIONAL SUPPORT PROCESSES**

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

The ongoing, iterative, participatory design of the education program at Milestone Democratic School is its hallmark feature. School Meeting and School Design are sites of deliberative democratic practice. These design processes will be supervised and managed by the MDS Governance Board, who have expertise in the Collective Co-design Framework, and will be delivered by the Teacher Professional Practice under the guidance and supervision of the Board.

### **8.02 Describe how instructional content and methodology will be continuously improved.**

The iterative nature of Collective Co-design requires periodic evaluation and revision of the educational program, as described in above sections.

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

The Governance Board shall be responsible for oversight of the Teacher Professional Practice to ensure that all federal state, and local health ordinances are followed. All teachers will be trained in and complete a state-sponsored or regionally recognized threat-assessment tied to best-practices. A School Safety and Community Awareness Committee shall be formed prior to school opening and this committee will seek collaborative learning opportunities with local law enforcement, local school district leadership teams, and other non-profit organizations committed to community safety. At the school level, a commitment to Restorative Practices, including youth-led circles for conflict resolution and justice, form the foundation of safety at Milestone Democratic School.

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

Conflict resolution and justice practices will be rooted in Restorative Practices and youth-led interventions. Peer mediation, a justice committee made up of student volunteers, a focus on harm reduction through community building, and harm repair through offender-victim circles, will be the hallmark practices of Milestone Democratic School's discipline policies. The Design Team states that "all students must be treated as individuals with a right to learn, even offenders who violate our school's values." Accordingly, every effort will be made to build systems to restore community after harm, and to minimize the use of punitive justice tools like suspension and expulsion. However, the Design Team also clearly states that "emotional and physical safety" are paramount values for MDS, and as such a student who creates an intentionally unsafe condition, for which restitution and restoration are not feasible, shall be removed from the school by decision of the Teacher Professional Practice and the School Governance Board.

### **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.**

To track accurately track pupil records, Milestone Democratic School shall adopt a student information system (SIS) such as Infinite Campus, Skyward, Powerschool, or Educlimber. In close collaboration with the student-design team, the Teacher Professional Practice will propose a blend of authentic, performance-based assessments tied to growth benchmarks (likely in a series of digital portfolios and exhibitions of mastery) with valid and reliable adaptive assessment tool (likely NWEA's MAP Growth systems or similar). All students will receive a minimum of 5-hours of small group instruction, a 30-minute weekly check-in with a teacher, and quarterly records reviews. Students will also receive targeted small-skill and large school interventions and accelerations for literacy and numeracy skills.

### **8.06 Identify key student services and how they will be managed.**

All students with disabilities and youth identified as At-risk shall receive their educational services and supports at Milestone Democratic School. The faculty will employ a special education teacher; or, provide the contracted services. Reading specialist shall also be provided to students in order to assist with getting educationally disadvantaged students to improve their instructional and independent reading level.

A distinguishing characteristic and foundational principle of Milestone Democratic School is the willingness and intentionality of school faculty to connect with services providers focused on serving the youth. The school developer, Sean Anderson, reached out to over a dozen non-profit organizations in Dane County during the summer of 2017 through 2018 in order to build an assistance network. These skillful practitioners will be activated to serve the youth of Milestone Democratic School.

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

As with other democratic schools, and schools run by a Teacher Professional Practice, Milestone Public School will employ an executive assistant to track attendance, monitor traffic through the front door of the school, and coordinate other school operations.

**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:**

See 8.06 above. Additionally, the Teacher Professional Practice shall monitor Fund 27 to ensure that all available federal, state, and local monies flow towards students with disabilities.



## **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.**

Sean Anderson and Dr. Michael McCabe developed the school financial plan. Dr. McCabe has managed school-level budgets in public, charter, and parochial school systems. Dr. McCabe has experience working with the Wisconsin Uniform Financial Accounting Requirements (WUFAR), and is a licensed special education teacher, principal, and superintendent. Dr. McCabe has managed both planning and implementation funds as a school developer and currently manages a building-level budget as a public middle school principal.

Mr. Sean Anderson is a licensed teacher and also manages the finances for Community | Learning | Design, Inc. Anderson has received training in participatory budgeting practices and presented at the national participatory budgeting conference in 2017. Anderson has a working knowledge of quickbooks and has used this accounting system to manage the non-profit organization since 2016.

Milestone Democratic School, an independent charter school, shall follow WI SS 43.70 and abide by the WUFAR regulations. This will allow for the independent charter to smoothly transition into an instrumentality charter school following successful completion of the 5-year relationship with the Office of Educational Opportunity.

### **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.**

Anderson and McCabe are responsible for managing the business aspects of Milestone Democratic School. Anderson is the school developer. McCabe is the Governance Board President.

### **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.**

Community | Learning | Design, Inc has integrated the lean start-up concepts and gotten to the Design Team to this point in the process by collaborating closely with other non-profit organizations. Capital required to plan and open the school shall come from two sources: 1) start-up funds from the Department of Public Instruction, 2) per-pupil revenue from students enrolled in Milestone Democratic School. Meaning, in order to successfully plan and open the school, students are necessary and the start-up funds from the grant allow the Design Team to fully maximize their school plan. As section 9.10 below outlines, the small-school is funded by distributing leadership across the Teacher Professional Practice. At this time, the plan is to not borrow and funds.

### **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.**

CLD has identified three possible school sites. Due to the current political climate surrounding independent charter schools in the City of Madison, and due to the upcoming mayoral election in April of 2019, Anderson and McCabe will only divulge the school locations to the review committee in-person and with the strictest assurance of confidentiality. Milestone Democratic School will open in August of 2020. Securing the location of the school is a collaboration between the governance board, teacher professional practice, and student-design team. This project will be activated in two phases. Phase one begins February 1, 2019, and is activated by formalizing a relationship between the Office of Educational Opportunity and the Milestone Democratic School Governance Board.

Phase two begins August 1, 2019, and is activated by the outcome of the start-up grant from the Department of Public Instruction. Phase two is a budgeted project and involves securing the school site through a democratic process in which the neighborhood, city officials, local education agencies, and other youth service centers such as the Boys and Girls Club of Dane County. The level of involvement from youth and community organizations for phase two of the this project will be shaped by the commitment from the DPI to this co-designed independent charter school in the City

of Madison. If the school developer and governance board president receive charter start-up funds, phase two of this process will involve the student-design team working with a neighborhood to secure the school site.

However, if Anderson and McCabe are unsuccessful in securing start-up funds, Milestone Democratic School will open out of existing building in which the rent and expenses to not exceed \$10,000 per month. Community | Learning | Design, Inc shall enter into a two-year lease and begin the process of finding a permanent school site for the 2022-2023 school year.

**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 Design Team states: “The physical space we create will support us as learners by having big open spaces, and round rooms for decision making. It will also have a space for being quiet and chill, a makerspace for creating, building and making, a gym, and gender-neutral bathrooms.” The Team also connects the physical space to our desired culture: “The school will make everyone feel safe and comfortable and respectful to plan their next step in life, from wherever they are starting. It will be a place where you feel that you know, and that people know you, by not being too big and not to small. Comfortable and inviting.”

Each advisory of 16 students needs its own classroom, so at maximum capacity of 200 enrolled students, MDS will need 13 classrooms, large and open enough to meet the desires of the Design Team, and to accommodate the unique arrangements necessary to facilitate personalized and student-directed project-based learning.

Our democratic commitment to serve all who come demands that our facilities far exceed ADA requirements for disability access. Inclusion of students with disabilities in the Design Team when construction and renovation are planned will ensure this.

**9.06 Describe the transportation arrangements made for the charter school students.**

The school site shall be within .25 miles of a bus stop. By year three of the school being opened a full transportation plan shall be in place to get students to school and home.

All revenue afforded to independent charter schools shall be pursued by the governance board. If it is not cost-effective to pay for bus services when the school opens in August of 2020. However, by 2023, the school will have graduates who will be looking for part-time jobs. It will be the responsibility of the governance board to secure transportation by the May of 2023, and the responsibility of the Teacher Professional Practice to hire qualified personnel to transport students.

Transportation, like all essential aspects of the School Plan for Milestone Democratic School, will be “on the table” during School Design. Though the needs, hopes, and desires of the youth Design Team and Teacher Professional Practice will determine the final plan for transportation, the Governance Board has considered the logistical and financial implications of:

1. Locating the school on one of Madison Metro Transit’s lines of service;
2. Purchasing a fleet of vans and having the teachers pickup students;
3. Committing to Badger Bus Company or another vendor for student transportation;
4. Developing a parent-community rideshare program.

These options, and those emerging during Collective Co-design, will be considered and deliberated over to find the best fit for our emerging school community.

### **9.07 Describe how food services will be provided for students.**

Similarly to Badger Rock School, an instrumentality charter school in the Madison Metropolitan School District, Milestone Democratic School will strive to provide all food to students from local sources. There will be a school garden, and relationships with local farmers and co-ops have already been established. At this point in the school planning process, the governance board has asked the student-design team to reach consensus regarding membership in the federal lunch program by May 15, 2019. That decision will inform the food services provided for the students of Milestone Democratic School. It is the intent of the school developer and board president for students to have the opportunity to receive breakfast, lunch, and dinner from their school.

### **9.08 Provide revenue and expenditure budgets for the first three years of operation.**

See attached report.

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

See attached report.

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

School year	Minimum number of students (\$7,600 estimate based on pre-Act 55 figure)	Teacher Professional Practice Membership
2020	18 pupils x \$7,600 = \$136,800	1.5
2021	30 pupils x \$7,600 = \$228,000	2.5
2023	50 pupils x \$7,600 = \$380,000	3.0
2024	70 pupils x \$7,600 = \$532,000	4.0
2025	100 pupils x \$7,600 = \$760,000	5.0

### **9.11 Show how the budget addresses the unique aspects of the school.**

The budget prioritizes the collective teacher efficacy and overall student experience. Paying highly qualified teachers a competitive salary and benefit package was identified by the Design Team. Students who had attended other schools of choice and participated on the Design Team noted: good teachers leave after a short period of time. One youth school designer stated, “find out what other places are paying, and give them a little bit more”. Paying for staff and building a cadre of teacher-leaders is essential to the success of the school. The second priority is providing students with and world-class educational experience.

### **9.12 Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected) (118.40(1M)(B)11).**

Annual comprehensive financial audit to be completed by Godfrey and Associates. Michael Godfrey, CPA will lead the audit process.

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

Community | Learning | Design, Inc and the Governance Board of Milestone Democratic School shall raise funds needed beyond the per-pupil allocation. The Teacher Professional Practice and Design Team are not responsible for raising funds.

Established in 2016 as a school design firm and educational support agency, Community | Learning | Design, Inc has successfully funded the start-up initiatives to date for Anderson and the Design Team. The school developer and governance board president have demonstrated an ability to coordinate and execute events ranging from school design workshops to formal galas. Once an agreement has been reached with an authorizer, and the outcome of the 2019 start-up grant with the Department of Public Instruction has been determined; a formal fundraising plan shall be enacted. The school will have a Spring Gala and a Back To School Drive as two annual fundraisers. These events have raised \$50,000 annually at other small-schools.

## **10.00 LEGAL REQUIREMENTS AND PROCEDURES**

### **10.01 List the legal requirements for operating a public charter school.**

The design team does not intend to circumvent any federal laws. The legal requirements for operating a public charter school are outlined in Wisconsin State Statute 118.40.

The design team requests a waiver for the following state laws:

- WI SS 115.415 Educator effectiveness.
- WI SS 118.33 High school graduation standards; criteria for promotion.

### **10.02 Describe the policies and procedures developed to address these requirements.**

The Teacher Professional Practice shall create a sustain a community of practice based on implementing continuous improvement frameworks with an emphasis on reflection and growth.

The Design Team will create the graduation standards and criteria; further, the graduation standards will change over time based on the needs of the learners and community.

### **10.03 Describe the level and types of insurance coverage the board will provide.**

Thirty days prior to the opening of school, the governance board shall provide an umbrella insurance policy to mitigate against potential liability or harm due to actions occurring at school or involving school personnel.

### **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.**

See section 8.05 above. The school will leverage a student information system to track achievement, maintain health records, store emergency contact information, and manage day-to-day administrative records. Milestone Democratic School shall maintain cumulative student records in a vertical filing cabinet.

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

Community stakeholders shall be informed of their rights through formal and informal processes. The Design Team has generated a narrative in which youth values, rights, and responsibilities are brought to the forefront of the school dialog. Weekly school-wide meetings will also assist in developing an understanding of the rights and responsibilities of the students in the charter school.

**Appendix (attached):**

- “Milestone Democratic School: A Plan for Engaging, Participatory, Future-Forward Learning - Iteration #1”
- Wisconsin Department of Financial Institutions, Form 102-Nonstock Corporation Articles of Incorporation
- Community | Learning | Design - “School #1” Sponsoring Committee
- Budget report

# **APPENDIX**

**to the**

**Proposal by  
Community | Learning | Design**

**For the  
Office of Educational Opportunity  
University of Wisconsin System**

**Title: Milestone Democratic School, Phase II Authorization - Appendix**

**Date submitted: 09 December 2018**

## **Contents:**

- “Milestone Democratic School: A Plan for Engaging, Participatory, Future-Forward Learning - Iteration #1”
- Wisconsin Department of Financial Institutions, Form 102-Nonstock Corporation Articles of Incorporation
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- Budget report



# Milestone Democratic School

• A Plan for Engaging, Participatory, Future-Forward Learning •

Authors

Jurie Mayo  
Malik McDonald  
Stefano Oviedo  
Devika Pal  
Gersely Rios  
Sean M.Z. Anderson

## Iteration #1

*December 2018 Madison, WI*

Facilitated by:



Community|Learning|Design  
501(c)(3) Teacher Professional Practice & School Design Firm  
[communitylearningdesign.org](http://communitylearningdesign.org)

# Contents

1. Author Bios and Acknowledgements
2. Introduction: Why This School?
3. The Learners of Milestone Democratic School
4. Learning That Is Engaging
5. Everyone Has a Voice, and Every Voice Is Heard
6. The Most Important Step Is the Next One
7. Forward!

# Acknowledgements

The Design Team would like to thank the following people for their support, guidance, and help throughout this process:

- Our Families
- Ms. Hedi Rudd and the incredible community at Badger Rock Neighborhood Center for their welcoming generosity (and delicious food - thanks Chef Kipp!)
- Our community supporters, sponsors, friends, and allies

# Author Bios

## Jurie Mayo

Hello, my name is Jurie, I am 19 years old, and I have been a community organizer with Freedom Inc for four years. I joined this project because I feel like having a queer, black, and gender non-binary voice would be able to help shape this school.



## Devika Pal

My name is Devika Pal. I am 13 years old. I am born and brought up in Madison Wisconsin. My parents are immigrants from India. I chose to go into this project because I feel like there should be a school in which students find learning engaging, where they are heard and where it prepares us for the future.



# Stefano Oviedo

I'm a young student the age of 18 who lives in Madison, Wisconsin, that's very open minded, and a proud Mexican. I want to see a change in the education of students and to help them to get the next step in their lives.



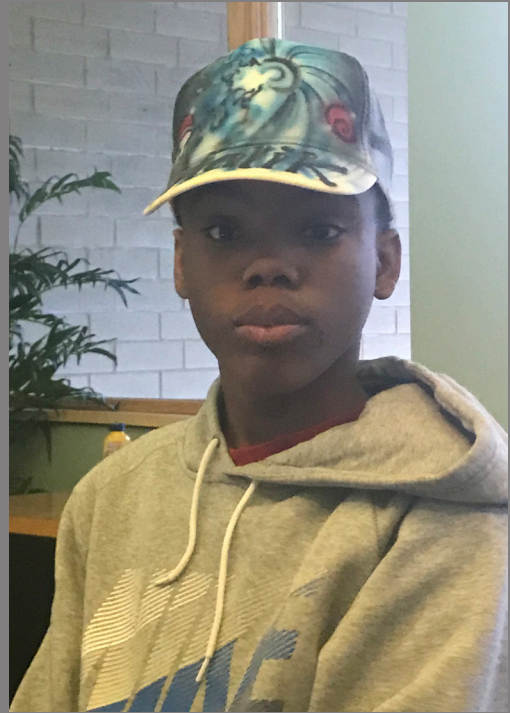
# Gersely Rios

I am 13 years old and I am from Venezuela, I just moved from there to Madison, Wisconsin. I enter this project because I think that as a Latina, woman, and an immigrant of this country, I can contribute some of my ideas and experiences to this "school-to-be" in how to teach students that education and respect are important values wherever you are, they are highly appreciated.



# Malik McDonald

I am a thirteen year old. I live in Madison, Wisconsin. I joined this project because I wanted to make a school where students are able to express them self. Merry Christmas and if you don't celebrate that then have a good day!



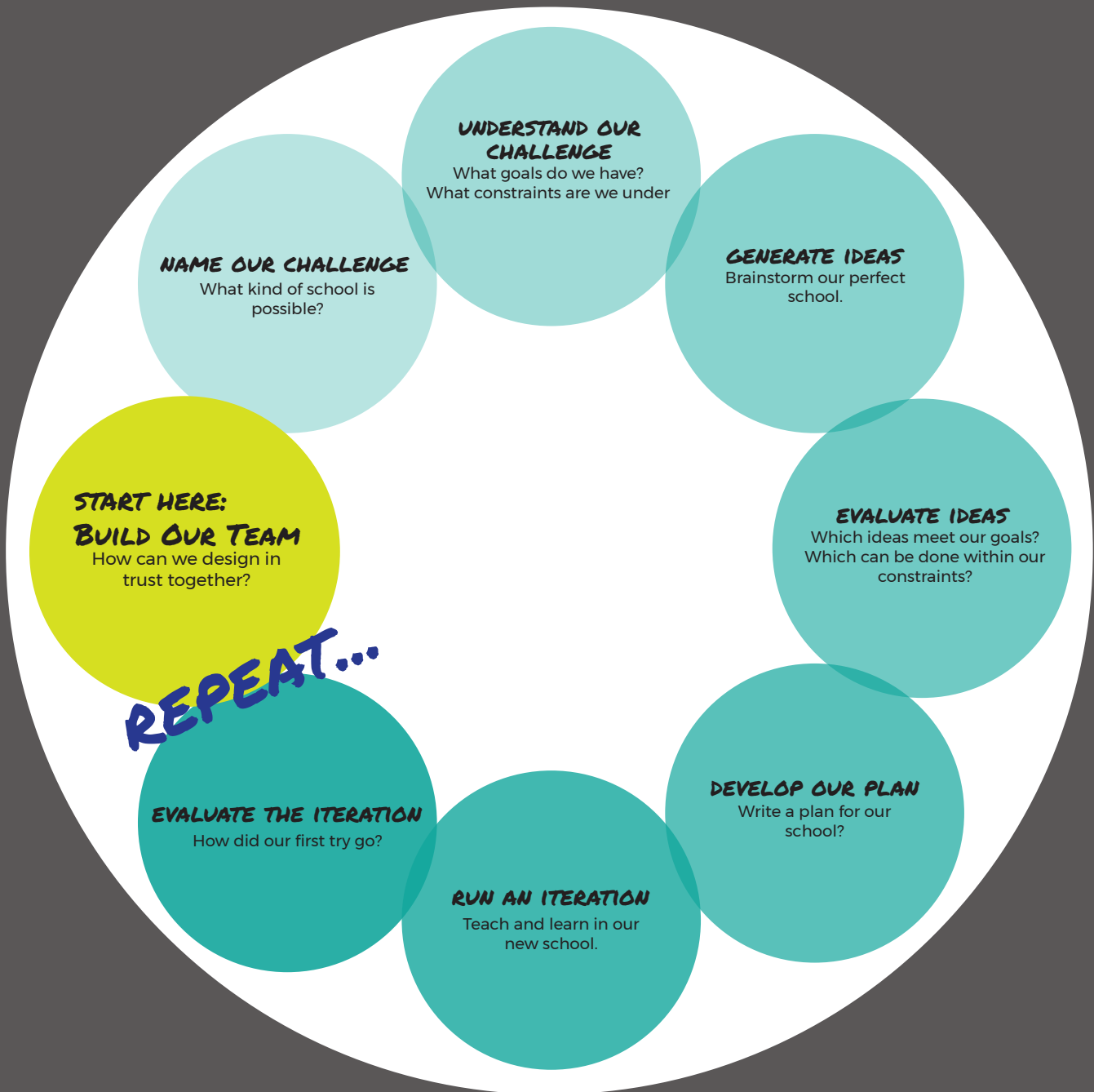
# Sean Anderson

I am 38 years old -- I've been a student, a retail worker, a construction worker, a counselor, and a teacher. I joined this team because I believe in democracy and I know that young people deserve the chance to guide their own learning.



# Learning/Design Plan

## Phases of Participatory School Design:



Note: The design team moves from one Phase to another only by Formal Consensus of the entire team.





# Introduction: Why Milestone Democratic School?

## At Milestone Democratic School, we believe that:

- All people work and learn better when they feel emotionally and physically safe;
- Real, meaningful learning is always engaging;
- Everyone has the right to choose what they learn, when they learn it, and how they learn best; and
- Education must prepare us to succeed in this world as it is, and also help us develop the tools to make the world a better place.

By making this school, we are contributing to the creation of a different and better world.

## Our vision for this world is:

- A democratic one
- Where everyone has a voice, and
- All voices are heard and respected.

## Our mission is to bring this world into being, by helping people to:

- Learn to think critically,
- Find out who they are and who they want to be, and
- Develop democratic skills and attitudes so they can share power in their communities.

To make sure that our school is constantly growing, improving, and changing along with us and the world around us, we are committed to a flexible school structure. Being able to change our school to respond to the needs of our communities is the most important part of our school design. At weekly School Meetings, we will check in on problems and possibilities, and make decisions democratically - "one person, one vote," including all students and staff. At least once a year, we will gather a Design Team of diverse voices, including students, teachers, staff, families, and community members, to evaluate and reiterate our school design - take it back to scratch and interrogate every decision democratically through consensus.

# Each of us as Learners, Building a School for Us

## Our story

This school is designed by youth, people of color, LGBTQ folx, builders, dreamers, and doers: a team of designers who care about learners and learning. This school is designed to serve anyone who wants choice and connection in their learning - for those who believe in democracy, deep learning about this world, and creating a better world as we learn.

The story of this school design is of young people from different backgrounds volunteering their time, researching in their communities, and using restorative and democratic processes to create a school based on their highest aspirations. Milestone Democratic School's story starts in December of 2017, when the non-profit Community | Learning | Design received initial authorization from the University of Wisconsin's Office of Educational Opportunity to begin developing a new public charter secondary school. Over the summer of 2018, CLLD launched a community organizing campaign to build partnerships with youth-service organizations and to recruit school designers. A team of five dedicated youth were selected from applicants after interviews and consultations with families. This team held regular design sessions after school and on weekends throughout the fall of 2018, following a curriculum for Participatory School Design authored by the directors of CLLD.

After training in Restorative Practices, Formal Consensus, and Design, the team crafted a "Possibilities Statement" by consensus. This statement became the guidepost for all visioning and development of school design elements:

"Our school can be a place where learning is cool, where everyone has a voice and everyone is heard, and where the most important step is the next one."

Out of this Possibilities Statement, and using storytelling as a critical ideation tool, a set of Design Criteria began to emerge. The team quickly realized, however, that this set of goals for our school was missing input from important voices. After identifying "youth not in the room," stakeholders, and experts who should have input on our design, the team conducted several weeks of "listening sessions," which were then analyzed for additions to our list of goals. Our final list of Design Criteria, adopted by consensus, states:



Our school should:

- Provide relevant learning that will help us in life
- Make students feel environmentally safe
- Give students choice over what they learn and how they learn it (flexibility)
- Focus on social, emotional, and academic success (accountability)
- Be staffed by teachers who can empathize and relate to students
- Be governed in a way that includes students, teachers, and staff
- Be accessible and welcoming to all, regardless of income, race, ethnicity, gender expression, culture, or identity
- Treat everyone as an individual
- Organize time for better learning
- Empower everyone to be authentic
- Allow people to make meaning and grow towards mastery every day
- Use real-life experiences and problems for hands-on learning
- Create safe relationships to push students towards high expectations
- Build agency for equity, inclusion, and justice
- Help us navigate the world as it is, while also allowing us to create the better world we want

# Each of us as Learners, Building a School for Us

## continued...

From this broad set of goals, the team ideated and evaluated a series of design elements. The document that follows, also adopted by consensus of the Design Team, represents the best of the ideas we collected and generated to answer the question, "How do we create a school that will bring this possibility to life, while meeting each of these goals?"

We understand that this plan does not include all the details necessary to open our school. To continue this planning process, including writing the first handbook and hiring the first staff, the Design Team will continue to meet over the next year and work through restorative, consensus-based design to make all the necessary decisions to plan for opening.

### Iteration #1

The school will start off serving between 30 to 100 students, ages 14 to 18. The maximum number will be 200 students. Students will be centered in advisories, which will have no more than 16 students per advisor. Most classes offered will be no more than 20 students per teacher.

The physical space we create will support us as learners by having big open spaces, and round rooms for decision making. It will also have a space for being quiet and chill, a makerspace for creating, building and making, a gym, and gender-neutral bathrooms.

The teachers in this school will be empathetic, have diverse backgrounds, have had experience with trauma, and support democratic agency of their students. Teachers will have democratic agency also, to make sure that MDS recruits and retains the best staff possible. Teachers will be hired by the Design Team based on their ability to have empathy and relate to youth. The Design Team will intentionally recruit diverse teachers, with a focus on teachers of color and teachers from different countries around the world. At least some of the teachers should always be young people. The first role teachers will fill is as advisors to small groups, who coach their advisories on projects and internships. The advisors will also teach classes that are requested in School Design and School Meetings.

The schedule the learners will experience in this school is designed for best learning. The beginning of the school day will start off with a "soft start" of breakfast, open meeting and project work time, and gym access. At nine a.m., the classes and advising will start. The school days will be Monday through Friday, but during the weekend the building will be open for students to access to food, hygiene, the makerspace, and gym. The school will be year long, with longer breaks during each season.



# Learning that is Engaging

Milestone Democratic School will be a remarkable school because of its abilities to create an engaging process of learning. Students will be able to work in a diverse and culture-based environment, with the assistance of teachers, advisors and the students themselves. Our school will be based on a democratic system where each student is able to decide what are the things that they think is important to be academic, social and emotional successful in their future. Our idea of "Student-directed Project Based Learning," working one-on-one with advisors, and creating Learning Plans based on specific individual goals will help us create this engaging learning.

MDS will work with the community by making internships a part of every student's school week. Also, we will use community experts to help advise projects, which will help the student to feel an affinity with people that they already know as well as people they have never met before.

Another thing that our school will be different from the others it is that the actual learning would be involved in equality and critical thinking, which will help them to be good citizens.

Treating everyone as an individual, hands-on learning, and keeping tab of the student's progress, are some of the principal elements that our school, which will make sure that students are actually learning and growing academically, socially and emotionally. One-on-one coaching from an advisor, based on progress toward each student's goals, will be the main way student growth is tracked.



# Making every voice heard

The way our school will make sure that everyone feels safe, comfortable, and respected when making their voices heard is having daily circles, along with check-ins.

When decision-making in our school, we will make sure that all voices are heard by having a whole school meetings where every person is equal to one vote, and the decision is made by majority rule. When we redesign the school (at least once per year) by evaluating and reiterating our design process, we will make sure the Design Team is diverse and representative, and includes students, teachers, staff, families, and community members.

The way that authority will work in our school, to make sure that all voices will be heard is by making sure we use Restorative Justice and circle practices.

Families' voices will be heard by having open communication. We can do this by having conferences with families and guardians focused on learners' strengths and needs. Also, families will have open invites to attend weekly school meetings as observers and to give their opinions (though they will not be able to vote).

The way that we'll make sure that all voices are heard in the way we teach and learn make is by making sure that everyone is included in discussions. When we give and receive feedback, assessments, and evaluation, we will make sure that all voices are heard by weekly staff and student evaluations. Which means that one on one meetings will happen in order to give critiques on one another.

Our justice practice will ensure that all voices are heard by, holding students accountable instead of disciplining them, by keeping everyone safe, while treating everyone (including offenders) as individuals with a right to be heard, and a right to learn. Restorative Justice will help us do this.



# The most important step is the next one

The school will make everyone feel safe and comfortable and respectful to plan their next step in life, from wherever they are starting. It will be a place where you feel that you know, and that people know you, by not being too big and not too small. Comfortable and inviting.

We will use community resources to help show what to look forward to for the future, and what students need to be ready for their next steps. Each student will be out of the school for part of their school week to go to internships with businesses, community organizations, or government. Students will use community mentors for the path they desire as they work on projects and internships.

This school will help students get to the next steps in life by making individual learning plans showing step by step what to expect and what is needed. By setting specific learn goals, students and advisors will write plans to reach them. They will have their own personalized learning to get to their goal.

Students will receive evaluations, feedback, and assessments that will help get them to the next step. Students won't get shut down, and advisors won't make them feel like they failed and didn't do it right. Instead we will show them how to bounce back from their mistake, in one-on-one coaching to give feedback on their learning plans.

# FORWARD!!!

This School Plan is a living document. As the Design Team grows (let us know if you want to join!) and the planning process for Milestone continues, we will continue to practice democracy in our design work to ensure that this school serves young people and their communities in the best way possible.

Please reach out to us to talk more about this work! We'd love input, advice, words of encouragement, words of warning, or anything else you want to share.

Til next time,

*The School Design Team of  
Milestone Democratic School*



## Corporations Bureau

### Form 102-Nonstock Corporation Articles of Incorporation

#### Name of Corporation

Name of Corporation: Community | Learning | Design  
CORPORATION, INC

#### Principal Office

Mailing Address: 422 Leslie Drive  
City: Edgerton  
State: WI  
Zip Code: 53534

#### Registered Agent

Registered Agent Individual: Michael S. McCabe  
Name of Entity:  
Street Address: 422 Leslie Drive  
City: Edgerton  
State: WI  
Zip Code: 53534

#### Select Statement

Select one statement: The corporation will NOT have members  
Is this corporation authorized to make distributions under the statute?: No  
This document was drafted by: Michael S. McCabe

#### Incorporator

Name: Sean M. Anderson  
Street Address: 103 N. Madison St.  
City: Stoughton  
State: WI  
Zip Code: 53589

#### Incorporator Signature

I understand that checking this box constitutes a legal signature: Yes  
Incorporator Signature: Michael S. McCabe

#### Optional Articles

The purpose(s) for which the corporation is incorporated: The primary purpose and objections of this Corporation are to provide educational services and support.  
Delayed Effective date: 09/12/2017

**Directors**

<b>Name:</b>	Michael S. McCabe
<b>Street Address:</b>	422 Leslie Drive
<b>City:</b>	Edgerton
<b>State:</b>	WI
<b>Zip Code:</b>	53534
<b>Name:</b>	Sean M. Anderson
<b>Street Address:</b>	103 N. Madison St
<b>City:</b>	Stoughton
<b>State:</b>	WI
<b>Zip Code:</b>	53589
<b>Name:</b>	Corey Livieri
<b>Street Address:</b>	849 Jana Lane #2
<b>City:</b>	Madison
<b>State:</b>	WI
<b>Zip Code:</b>	53704

**Optional Contact Information**

<b>Name:</b>	
<b>Address:</b>	422 Leslie Drive
<b>City:</b>	Edgerton
<b>State:</b>	WI
<b>Zip Code:</b>	53534
<b>Phone Number:</b>	9203583002
<b>Email Address:</b>	teach4aliving@gmail.com

**Endorsement**

	FILED
<b>Received Date:</b>	09/12/2017



# Community | Learning | Design - "School #1"

## Sponsoring Committee

The following individuals are in support of C|L|D's vision of youth-adult partnerships to co-design a new public school in Dane County, Wisconsin, and endorse our work to bring this vision to reality.

<b><u>Name</u></b>	<b><u>Organizational Affiliation</u></b> <i>(for identification only - not to indicate organizational endorsement)</i>
Tim Storm	Parent and former teacher, Madison Metropolitan School District
Erin Trondson	Head of School, Woodland Montessori, Madison WI Adjunct Professor, UW River Falls
Lilliam Post	Bilingual and Education Coordinator, Catholic Multicultural Center, Madison WI
Casey Behrend	Executive Director, Briarpatch Youth Services, Madison WI
Heather Wentler	Founder, Fractal Madison & the Doyenne Group
Sarah Probasco	Parent and member, HEART Homeschool Organization, Madison WI
Ali Muldrow	Co-director, GSAFE Wisconsin
Sawyer Johnson	Madison, WI
Jaime Harris	Founder, EduClimber School Psychologist, Edgerton Middle School
Dana Bennis	Director of Learning, Institute for Democratic Education in America (IDEA), Jackson, MS
Scott Brown	Coordinator of Academic Collaboration, Parsons DESIS Lab, New York
Dana Harris	Manager of Policy and Advocacy, Generation Citizen, New York
Nora Whalen	Advisor, Avalon School, St Paul MN
Christine Flanagan	President & Benevolent Troublemaker, Kinetic Seeds, Massachusetts
Ashlee Greenwood	Chief Do-Gooder, One Stone School, Boise ID
Erin Raab	Co-Founder & Executive Director, REENVISIONED, California

communitylearningdesign.org



**School #1**  
**Charter School Expenses**  
**Annual Five Year Projections**  
**A Community | Learning | Design Venture**

Line	ITEM	TOTAL COST Year 1	TOTAL COST Year 2	TOTAL COST Year 3	TOTAL COST Year 4	TOTAL COST Year 5
	<b>SALARIES AND WAGES</b>					
1	ADMINISTRATIVE STAFF SALARIES AND WAGES	\$ 45,000	\$ 60,000	\$ 75,000	\$ 80,000	\$ 95,000
2	CLASSROOM STAFF SALARIES & WAGES	\$ 210,000	\$ 280,000	\$ 350,000	\$ 420,000	\$ 490,000
3	EXTENDED CONTRACT-STAFF SALARY AND WAGES	\$ 30,000	\$ 40,000	\$ 50,000	\$ 60,000	\$ 70,000
4	BUILDING MAINTENANCE STAFF SALARIES AND WAGES	\$ 24,000	\$ 24,000	\$ 32,000	\$ 32,000	\$ 32,000
5	SECURITY STAFF SALARIES AND WAGES					
6	FOOD SERVICES STAFF SALARIES AND WAGES	\$ 8,000	\$ 8,000	\$ 8,000	\$ 8,000	\$ 8,000
7	PUPIL TRANSPORTATION STAFF SALARIES AND WAGES					
8	<b>TOTAL SALARIES AND WAGES</b>	\$ 317,000	\$ 412,000	\$ 515,000	\$ 600,000	\$ 695,000

	<b>FICA AND MEDICARE TAXES</b>					
9	ADMINISTRATIVE STAFF FICA & MEDICARE TAXES					
10	CLASSROOM STAFF FICA & MEDICARE TAXES					
3	EXTENDED CONTRACT-STAFF FICA & MEDICARE TAXES					
11	BUILDING MAINTENANCE STAFF FICA & MEDICARE TAXES					
12	SECURITY STAFF FICA & MEDICARE TAXES					
13	FOOD SERVICES STAFF FICA & MEDICARE TAXES					
14	PUPIL TRANSPORTATION STAFF FICA & MEDICARE TAXES					
15	OTHER STAFF FICA & MEDICARE TAXES					
16	<b>TOTAL FICA AND MEDICARE TAXES</b>	\$ -	\$ -	\$ -	\$ -	\$ -

	<b>UNEMPLOYMENT TAXES</b>					
17	ADMINISTRATIVE STAFF UNEMPLOYMENT TAXES					
18	CLASSROOM STAFF UNEMPLOYMENT TAXES					
19	BUILDING MAINTENANCE STAFF UNEMPLOYMENT TAXES					
20	SECURITY STAFF UNEMPLOYMENT TAXES					
21	FOOD SERVICES STAFF UNEMPLOYMENT TAX & PAYMENTS					
22	PUPIL TRANSPORTATION STAFF UNEMPLOYMENT TAXES					
23	OTHER STAFF UNEMPLOYMENT TAXES					
24	<b>TOTAL UNEMPLOYMENT TAXES</b>	\$ -	\$ -	\$ -	\$ -	\$ -

	<b>EMPLOYER PAID BENEFITS</b>					
25	ADMINISTRATIVE STAFF EMPLOYER PAID BENEFITS					
26	CLASSROOM STAFF EMPLOYER PAID BENEFITS					
27	BUILDING MAINTENANCE EMPLOYER PAID BENEFITS					



**School #1**  
**Charter School Expenses**  
**Annual Five Year Projections**  
**A Community | Learning | Design Venture**

28	SECURITY STAFF EMPLOYER PAID BENEFITS								
29	FOOD SERVICES STAFF EMPLOYER PAID BENEFITS								
30	PUPIL TRANSPORTATION STAFF EMPLOYER PAID BENEFITS								
31	OTHER STAFF EMPLOYER PAID BENEFITS								
32	<b>TOTAL EMPLOYER PAID BENEFITS</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

	<b>CONTRACTED PROFESSIONAL SERVICES</b>								
33	ACCOUNTING SERVICES	\$ 1,080	\$ 1,080	\$ 1,080	\$ 1,080	\$ 1,080	\$ 1,080	\$ 1,080	\$ 1,080
	IDENTIFY NAME OF ACCOUNTING SERVICES PROVIDER BELOW								
33a	Michael Godfrey - CPA								
34	INDEPENDENT AUDITING SERVICES	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
	IDENTIFY NAME OF INDEPENDENT AUDITING SERVICES PROVIDER BELOW								
34a	Wipfli LLP								
35	EDUCATIONAL CONSULTANT SERVICES	\$ 30,000	\$ 30,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
36	LEGAL SERVICES	\$ 5,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
37	OTHER PROFESSIONAL SERVICES - School Visits	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 10,000
38	<b>TOTAL CONTRACTED PROFESSIONAL SERVICES</b>	\$ 86,080	\$ 82,080	\$ 62,080	\$ 62,080	\$ 62,080	\$ 62,080	\$ 32,080	
	<b>ITEM</b>								
	<b>PURCHASED OPERATIONAL SERVICES</b>								
39	TELEPHONE	\$ 4,200							
40	INTERNET ACCESS	\$ 15,000	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500	
41	ELECTRICITY	\$ 13,000	\$ 13,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	
42	GAS FOR FACILITY OPERATION								
43	EQUIPMENT MAINTAINANCE AND REPAIR	\$ 5,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	
44	BUILDING MAINTENANCE	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
45	BUILDING REPAIR	\$ 20,000	\$ 25,000	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	
46	OTHER BUILDING OPERATION EXPENSE								
47	FOOD SERVICE PREPARATION AND MEALS	\$ 2,500	\$ 3,000	\$ 4,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 7,500	
48	SECURITY SERVICES	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	
49	CONTRACTOR OPERATED PUPIL TRANSPORTATION SERVICES	\$ 1,000	\$ 1,000	\$ 1,500	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
50	PUPIL TRANSPORTATION VEHICLE MAINTENANCE AND REPAIR								
51	OTHER VEHICLE MAINTENANCE AND REPAIR								
52	OTHER PURCHASED OPERATIONAL SERVICES	\$ 10,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	
53	<b>TOTAL PURCHASED OPERATIONAL SERVICES</b>	\$ 92,700	\$ 91,500	\$ 80,000	\$ 76,500	\$ 79,000			

**School #1**  
**Charter School Expenses**  
**Annual Five Year Projections**  
**A Community | Learning | Design Venture**

	<b>FACILITY OCCUPANCY CHARGE</b>								
54	FACILITY RENT	\$	30,000	\$	30,000	\$	30,000	\$	30,000
	IDENTIFY TO WHOM RENT IS PAID (Enter on line below)								
	LOCATION TBD								
55	TOTAL FACILITY OCCUPANCY CHARGE	\$	30,000	\$	30,000	\$	30,000	\$	30,000

	<b>SUPPLIES</b>								
56	ADMINISTRATIVE SUPPLIES	\$	13,500	\$	12,500	\$	12,500	\$	21,500
57	CLASSROOM SUPPLIES	\$	79,000	\$	60,000	\$	60,000	\$	60,000
58	BUILDING MAINTENANCE SUPPLIES								
59	SECURITY OPERATIONS SUPPLIES								
60	FOOD SERVICE SUPPLIES	\$	10,000	\$	15,000	\$	20,000	\$	22,500
61	PUPIL TRANSPORTATION SUPPLIES								
62	OTHER SUPPLIES								
63	TOTAL SUPPLIES	\$	102,500	\$	87,500	\$	92,500	\$	104,000

	<b>INSURANCE</b>								
64	INSURANCE	\$	5,500	\$	5,500	\$	5,500	\$	5,500
65	TOTAL INSURANCE	\$	5,500.00	\$	5,500.00	\$	5,500.00	\$	5,500.00

	<b>OTHER</b>								
66	OTHER EXPENSES (ATTACH ITEMIZATION IF AMOUNT ON LINE IS OVER \$500)								
67	TOTAL OTHER - Deposit into General Funds	\$	90,152.00		156,960		255,420		462,300
68	INTEREST EXPENSE CURRENT CASH FLOW DEBT								510,880
69	TOTAL OPERATING EXPENSES	\$	723,932	\$	865,540	\$	1,040,500	\$	1,340,380

\$ 1,458,960



**Charter School Revenues**  
**Annual Five Year Projections**

REVENUE ITEMS	TOTAL REVENUES Year 1 64 pupils	TOTAL REVENUES Year 2 80 pupils	TOTAL REVENUES Year 3 100 pupils	TOTAL REVENUES Year 4 135 pupils	TOTAL REVENUES Year 5 170 pupils
<b>CONTRACT AMOUNT &amp; CONTRIBUTIONS</b>					
CONTRACT AMOUNT (# of Pupils X \$8,188)	\$ 524,032	\$ 655,040	\$ 818,000	\$ 1,105,380	\$ 1,391,960
OPERATORS' SUBSIDY or CONTRIBUTION					
FUND RAISING OR EXTERNAL CONTRIBUTIONS	\$ 5,000	\$ 10,000	\$ 15,000	\$ 25,000	\$ 40,000
<b>TOTAL TUITION &amp; CONTRIBUTIONS</b>	\$ 529,032	\$ 665,040	\$ 833,000	\$ 1,130,380	\$ 1,431,960
<b>SCHOOL FEES</b>					
BOOK & SUPPLY FEES					
PERSONAL USE ITEMS					
SOCIAL AND EXTRA-CURRICULAR FEES					
<b>TOTAL SCHOOL FEES</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>FOOD SERVICE REVENUES</b>					
MEAL AND OTHER FOOD SERVICE CHARGES	\$ 6,400	\$ 8,000	\$ 10,000	\$ 13,500	\$ 17,000
GOVERNMENT FUNDED FOOD SERVICE ASSISTANCE	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL FOOD SERVICE REVENUES</b>	\$ 6,400	\$ 8,000	\$ 10,000	\$ 13,500	\$ 17,000
<b>OTHER GOVERNMENT PAYMENTS: List Below</b>					
Charter Start-up Grant from Wisconsin DPI	\$ 188,500	\$ 187,500	\$ 187,500	\$ 186,500	\$ -
Grants	\$ -	\$ 5,000	\$ 10,000	\$ 10,000	\$ 10,000
<b>TOTAL OTHER GOVERNMENT PAYMENTS</b>	\$ 188,500	\$ 192,500	\$ 197,500	\$ 196,500	\$ 10,000
INVESTMENT INCOME					
RENTAL OF FACILITIES TO OTHERS					
<b>OTHER: Describe Below</b>					
<b>TOTAL OTHER</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL REVENUES</b>	\$ 723,932	\$ 865,540	\$ 1,040,500	\$ 1,340,380	\$ 1,458,960

## **Phase II APPLICATION EVALUATION REVIEWER GUIDE**

Please consider the major elements of the proposal as outlined below and evaluate the Phase II application based on how well the applicant has responded in a meaningful and informative manner about how the proposed new charter school will be operated.

OEO's rubric model does not use a numeric rating system, instead reliance is placed on each reviewer's qualitative assessment and summary judgment of the elements within each section and final recommendation based on the overall merit and quality of the proposal and additional information. Information gleaned from applicant interviews, requests for clarification and committee discussions should also be considered when making a final recommendation. Therefore, reviewers should delay decision on their overall final recommendation until the applicant interviews and committee discussions have concluded. The Phase II evaluation rubric requires a final *evaluation summary* based on the merits of the proposal itself. However, the final overall recommendation should be delayed until the conclusion of the entire evaluation process.

Process to be followed to incorporate reviewer comments and final recommendation:

- All reviewers will be expected to make a summary judgment based on the merits of the proposal itself using the Phase II rubric. Additionally, at the conclusion of the entire process, all reviewers will be expected to provide a final overall recommendation using their summary judgment of the written proposal as well as information gleaned from applicant interviews and committee discussions.
- If the Evaluation Committee decides that additional clarification is necessary, the Associate Director shall secure the requested information from the applicant and forward to the Evaluation Committee prior to submission of final recommendations to the OEO.
- After receiving recommendations from the Evaluation Committee, the Associate Director shall review the results and make a summary recommendation to the UW 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, if applicable.
- To the greatest extent possible, Evaluation Committee members should strive to reach consensus on a final recommendation of whether a proposal should or should not be approved for authorization. If consensus cannot be reached the Associate Director will review recommendations and rationales from each reviewer and determine the summary recommendation to be made to the UW System President. The Evaluation Committee will be notified of the Associate Director's summary recommendation.
- If a recommendation for authorization is accepted, then contract negotiations will commence.

**Phase II Rubric**

<b>Name of Proposed School:</b>	Milestone Democratic School
<b>Proposed Location of School:</b>	Madison or Fitchburg, WI
<b>Date:</b>	January 2019
<b>Name of Reviewer:</b>	

**FINAL OVERALL RECOMMENDATION** (*complete this at the conclusion of the entire process by electronically highlighting your final recommendation*)

- ☐ Accept for further consideration of authorization
- ☐ Deny
- ☐ Resubmit in the future 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 summary judgement of the proposal.

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

The Strengths and Concerns boxes at the end of each section provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, so please be specific and focused in your comments.

The following definitions should guide the ratings:

**Meets the Standard:**

The response reflects a meaningful, 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 and readiness to open and operate a quality charter school.

### **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 as well as satisfies the authorizing priorities of the OEO.

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 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(s), telephone number(s), and email address(s) 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 serve, 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:	The authors provide thorough and detailed responses for each of the criteria. They demonstrate that they know who they want to be as a school community.
Concerns/Questions:	A question about the following statement: "having a diversity of ethnicities, races and religions in our teaching staff and student body."  Perhaps this will be addressed in another section, but I am curious to know how school leadership will ensure the diversity of the student population as expressed. I don't



	imagine the school will give preferential treatment toward students based on race and ethnicity. And since this is an important aspect of the school culture, it would be good to know how the diversity will be achieved.
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## 2. Governance and Leadership

For long term development the school must have 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:	To be sure, the school will have a unique leadership structure, which poses a slight challenge to determine if the proposal has met the criteria. In some cases, the proposed school is square peg, and the criteria are a round hole.
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Concerns/Questions:	<p>Will the school have autonomy over a budget? If so, does the Board need to approve said budget?</p> <p>Also, there will not a singular formal school leader, which is understandable in democratic school governance structure. Will there be a lead teacher? In the event of an “emergency,” in which time sensitive decisions need to be made, who has that responsibility?</p>
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### **3. Community and Family Engagement**

For any school to maintain long term viability it must incorporate community involvement, be responsive to the community, and work 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 developed.
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 nature of school lends itself well to this section—community building would appear to be central focus and potential strength of the school.
Concerns/Questions:	Criterion 5 asks about “attract and retain students.” I believe this will discussed in more detail in the next section, but this looked an opportunity to explain how the school will communicate to the community and work to retain current families.

#### **4. Marketing, Recruiting, and Admissions**

A viable marketing and recruitment plan is necessary to the success of opening a new independent charter school. 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 among 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:	A thorough and detailed description of marketing efforts that are aligned to the school's values and mission.
Concerns/Questions:	To be sure, and especially based on the school's values and principles, having a diverse student body is important. My only concern is the extent to which race and ethnicity is factored into admissions. During the interview process, it's not entirely clear how students will be accepted to the school.



## 5. Faculty and Staff

High quality school programs are based on effective staff recruitment and on-going 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:	The recruiting and staff structure seems in line with the school’s values and mission.
Concerns/Questions:	<p>In other sections, I have brought up concerns about the goal to create a racially and ethnically diverse school community. My concerns are about the legality of such practices, not the virtue in doing so, especially as a publicly funded school. Therefore, I am concerned about the following statement: “The Design Team will intentionally recruit diverse teachers, with a focus on teachers of color and teachers from different countries around the world.”</p> <p>I would defer to legal counsel to determine if there any problems with this statement.</p> <p>Moreover, I am concerned about this statement: “The commitment made by the Design Team to intentionally recruit and retain diverse teachers from many different backgrounds and places of origin will present some challenges regarding licensure, which the Governance Board will anticipate and be prepared to handle.”</p> <p>How will the Governance Board handle this challenge?</p>

## 6. Curriculum and Instruction

High quality schools have integrated models of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that will meet the needs of the students the school intends to serve? Does the applicant cite research support for the 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:	Clear defined philosophy of education and learning theory. The school knows who they are and who they want to be.
Concerns/Questions:	Very little mention, if any at all, of content. Perhaps that is a focus in the next section. A question I have: will preparing students for college and careers be an explicit goal?

## **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 does the assessment plan incorporate 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:	This is a section that again appears to be a square peg / round hole situation. And the authors succeed in conveying the values and mission of the school within a more traditional structure as presented through the criteria.
Concerns/Questions:	By their own admission, content takes a back seat. And while standards do not necessarily need to dictate curriculum and especially not pedagogy, my concern are regarding college admissions and expectations. My understanding is that colleges expect applicants and incoming students to have a certain knowledge base and some prerequisites. How will this be addressed? I understand and appreciate the student-driven model focused on learning skills rather than content—but how does this work with the external society?



	<p>I'm not sure if this is the place to ask about this, but I might as well: to what extent is this publically funded school accountable to the public? Are students required to take standardized tests? More importantly, does the school have a marketing strategy to communicate to the community at large as to the rationale, benefits, and success of the school? Given its unique, non-traditional program that is (in-part?) publicly funded, I would recommend this be a consideration.</p>
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## 8. Educational Support Processes

High quality schools have an educational program that includes a well-defined plan of operation; understood by educators, students and families. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the goals of 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 student 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, pupil identification, development of IEP's, 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 to attend the charter school.

**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 philosophy of the education program lends itself to supporting all students.
Concerns/Questions:	<p>"All students with disabilities and youth identified as At-risk shall receive their educational services and supports at Milestone Democratic School."</p> <p>There is not a mention of "gifted and talented" students that would also benefit from such a school. Is the school going to market itself as a school for kids who struggle in other traditional school environments? Might this be who they attract? If so, they should be aware of that, which could inform many decision-making processes including</p>

	personnel.
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## **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 school's 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 including the number and size of classrooms, common areas, and recreational space and the level of accessibility for disabled students and staff.
6. Describe the transportation arrangements made for the charter school students and/or the consideration given to how the school will ensure equal access if transportation is not provided. (Charter schools, by law, are not required to provide transportation).
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:	Thorough and detailed.
Concerns/Questions:	Transportation appears to be a challenge especially given the desire to draw from a wide range of communities. This is a common challenge for many charter schools.

### **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. Exhibit an understanding of 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 records on student achievement, health, emergency contact, high school credit, activities, etc.
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:	The authors appear to be aware of charter law and other legal obligations.
Concerns/Questions:	The following statement caught my attention and contributes to my ongoing concern about ‘college and career readiness’: “The Design Team will create the graduation standards and criteria; further, the graduation standards will change over time based on the needs of the learners and community.” I want to ensure that this is aligned with the expectations and requirements for college admissions.

Phase II Proposal Evaluation Summary

Please use your assessment of the ten criteria to make an evaluative judgment of the proposal below.

*(Electronically highlight your decision)*

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.
- ☒ Satisfactory - The proposal is sufficiently well developed.

**Application is not acceptable and should not be given further consideration for charter status. Use the space below to indicate rationale. (can choose more than one in this category)**

- ☐ Unsatisfactory - The proposal requires extensive work and the planning group should reevaluate its goals for the program.
- ☐ Does not fit within the OEO's chartering priorities.
- ☐ The proposal is lacking research to support the program design.

Rationale:

**Application has potential but additional information and work is required. (Use the space provided to specify area requiring revision).**

- ☐ 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:

Overall, the proposal submitters appear to be more than competent with regards to the process for opening a charter school and regarding the philosophy of education the school will adopt. While the school may not be a fit for "all students," that is a point of charter schools: diversifying the education options for K-12.

**I recommend that the school be granted a charter for the planning year with contingencies.** By the end of the school year 2019, the Governing Board needs to have a greater number of people who represent the community the school is planning to serve. The Board needs to have a majority of this representation. The primary purposes for this contingency:

1. It helps diversify the overall perspective of the school's leadership. As it stands, two white men from outside of Madison who are driving this effort does not present a strong image for serving non-white traditionally marginalized students in Madison. It could very well be that Sean and Michael are well-suited to lead this effort; however, based on some of their responses to questions during the interview and based on an anecdote shared with the panel during discussion, I believe having additional people on the Board who represent the communities the school plans to serve is critical.
2. As I've stated in this review and during the interview, my opinion on the value of the education program and philosophy of this proposed school is not that important given that the school is not intended for me or my family. And if I did believe in this unique approach to schooling (which I do to some degree), it matters less in comparison to how people in the school's target community feel. Therefore, it is important the Sean and Michael find people to join their Board who represent

the communities that the school strives to serve and who have complete buy-in regarding the approach and the efficacy of such a school. This will demonstrate a need for such a school in these communities. Otherwise, the founders risk acting as “outsiders” who enter a community claiming they know what is best for that community. They very well may be correct, but they need further evidence and support. And bringing on community representatives to the Board who share their passion and a beliefs about this approach to schooling would very much help their efforts.

## Phase II APPLICATION EVALUATION REVIEWER GUIDE

Please consider the major elements of the proposal as outlined below and evaluate the Phase II application based on how well the applicant has responded in a meaningful and informative manner about how the proposed new charter school will be operated.

OEO's rubric model does not use a numeric rating system, instead reliance is placed on each reviewer's qualitative assessment and summary judgment of the elements within each section and final recommendation based on the overall merit and quality of the proposal and additional information. Information gleaned from applicant interviews, requests for clarification and committee discussions should also be considered when making a final recommendation. Therefore, reviewers should delay decision on their overall final recommendation until the applicant interviews and committee discussions have concluded. The Phase II evaluation rubric requires a final *evaluation summary* based on the merits of the proposal itself. However, the final overall recommendation should be delayed until the conclusion of the entire evaluation process.

Process to be followed to incorporate reviewer comments and final recommendation:

- All reviewers will be expected to make a summary judgment based on the merits of the proposal itself using the Phase II rubric. Additionally, at the conclusion of the entire process, all reviewers will be expected to provide a final overall recommendation using their summary judgment of the written proposal as well as information gleaned from applicant interviews and committee discussions.
- If the Evaluation Committee decides that additional clarification is necessary, the Associate Director shall secure the requested information from the applicant and forward to the Evaluation Committee prior to submission of final recommendations to the OEO.
- After receiving recommendations from the Evaluation Committee, the Associate Director shall review the results and make a summary recommendation to the UW 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, if applicable.
- To the greatest extent possible, Evaluation Committee members should strive to reach consensus on a final recommendation of whether a proposal should or should not be approved for authorization. If consensus cannot be reached the Associate Director will review recommendations and rationales from each reviewer and determine the summary recommendation to be made to the UW System President. The Evaluation Committee will be notified of the Associate Director's summary recommendation.
- If a recommendation for authorization is accepted, then contract negotiations will commence.



### Phase II Rubric

<b>Name of Proposed School:</b>	CLD Proposal
<b>Proposed Location of School:</b>	TBD
<b>Date:</b>	1/3/1919 2/8/19
<b>Name of Reviewer:</b>	

**FINAL OVERALL RECOMMENDATION** (*complete this at the conclusion of the entire process by electronically highlighting your final recommendation*)

- **Accept for further consideration of authorization**
- Deny
- Resubmit in the future 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 summary judgement of the proposal.

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

The Strengths and Concerns boxes at the end of each section provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, so please be specific and focused in your comments.

The following definitions should guide the ratings:

**Meets the Standard:**

The response reflects a meaningful, 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 and readiness to open and operate a quality charter school.

### **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 as well as satisfies the authorizing priorities of the OEO.

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 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(s), telephone number(s), and email address(s) 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 serve, 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:	Visionary; necessary! Student voice/choice. Community collaboration. Consider adding to core beliefs: social/emotional learning leading to a level of spiritual connections to humanity and nature; practicing and teaching self-awareness and mindfulness; recognizing student <u>strengths and interests</u> as critical to learning; enabling/encouraging/empowering staff creativity and flexibility in meeting student needs.
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Concerns/Questions:	Consider investigating, training staff to recognize neurodiversity and implications for learning. Behavior is manifestation of how brain functions.
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## **2. Governance and Leadership**

For long term development the school must have 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:	Duties of board are clear and influential despite the board has yet to be formed. Great School Design Team and School meeting concepts.
Concerns/Questions:	Can we view the <b>Collective Co-Design framework</b> . What is vision long term of the weekly school meeting dynamics? What would compel them to be well attended with student/parent/community engagement? Will there be any sort of student council? 2.11: Board authorizes TPP and design team to perform various responsibilities but doesn't appear to approve/disapprove specific types of decisions. 2.13: Will there not be a "lead teacher," director or facilitator to provide some type of organizational framework? Could provide more specific criteria, skills, experience etc. for employees. 2.14: The relationship between CDL Board of Directors and Governance Board is somewhat confusing. Exactly who is on each board?

### **3. Community and Family Engagement**

For any school to maintain long term viability it must incorporate community involvement, be responsive to the community, and work 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 developed.
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:	3.0 Excellent description of populations to be served. 3.02-03: Good vision for community involvement but would like to see how this vision is met within “what” staffing levels but i presume that will come in the Planning Year. .
Concerns/Questions:	Could one develop a graphic depicting timelines that include specific phase developments of MDS? For example, hiring staff/advisors, developing goals/standards, student/project management, implementing student internships etc. 3.05:Could use more detail on how many staff will be working to address the goals of the school and who/how partnerships including internships be developed. How and on what timeline will these evolve?

#### **4. Marketing, Recruiting, and Admissions**

A viable marketing and recruitment plan is necessary to the success of opening a new independent charter school. 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 among 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:	Recognizes importance of diverse staff to serve diverse population. Despite in being in Phase II with another year for “planning,” it appears the developers have already established links to several important community partners.
Concerns/Questions:	4.0 As part of the admission process including interviews, will all students be offered opportunity to enroll? If not, then question of screening out could be an issue. Developers and eventual governance board should consider including current student advisors as members of the “founders” group that would allow them a waiver from a lottery.

## 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:	5.01: Recruiting efforts are commendable however, given the uniqueness of skill sets, should perhaps consider specific ways/means to recruit nationally including from similar schools. 5.04: Great; succinct and forceful.
Concerns/Questions:	5.02: This section needs significantly more development which one presumes would be occurring in the “planning year” should CLD be approved for a federal charter school grant.. Teachers may be enthusiastic about a democratic environment however, one can’t just assume “teachers will do their best work in a democratic, restorative environment.” Would like to see plans for how to develop such collaborative skills, joint problem solving, types of onsite and remote coaching to hone such skills as early as possible as referenced in 5.03. How does proposed salary/fringes compare with MMSD and is it reflected in revenue/expense report? 5.05 Advise to say all will be DPI certified. Need flexibility but don't want to hang up charter grants for questions about certification. 5.06: No involvement from UW school of ed. Will they provide any significant opposition to the MDS.

## 6. Curriculum and Instruction

High quality schools have integrated models of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that will meet the needs of the students the school intends to serve? Does the applicant cite research support for the 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:	6.01-6.02-6.03: Well developed. 6.04: Excellent
Concerns/Questions:	6.03: Where does neurodiversity fit in and how we are all different including how we process information, think, solve problems, kids on the spectrum, and the implications for staff training. Behavior is a manifestation of how one's brain functions and it's early learning experiences/trauma etc. 6.04: Perhaps expand on importance of socialization, collaboration, improvisation in the future society. How people get along? What will adults do when their jobs only require 20 hours per week more or less? 6.06: Well developed however, being versed in neurodiversity and implications for teaching and learning would naturally be attuned to needs of disabled students. It's the "brain" and impact of early learning/trauma that is expressed through various behaviors. 6.04: Great vision. Would advise that all relationships are rooted in self awareness and empathy. Hence, teaching awareness of self, emotions, control, confidence etc. become critical to accomplishing this objective, hence mindfulness training for staff and students.



## 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 does the assessment plan incorporate 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:	7.01: Good balance and great to see social/emotional emphasis with CASEL. 7.06: Expand on this as it relates to student progress but also how to meet state data requirements. 7.09: Good to see year around! 7:10: Okay.
Concerns/Questions:	7:05: Is social/emotional learning part of student achievement and if so, how does one show growth in this most critical area? 7.06: Note: how to address the prevailing negative impact of technology on social/emotional development; mental illness etc. 7.07: Expand on this e.g. type of data/progress management system to be used. 7:10: This could be expanded to including mutual exchange/training with public sector e.g internships, continuous improvement efforts etc. Consider adding neurodiversity and mindfulness for staff and students as critical training for current and future happiness and fulfillment and overall societal wellness.

## **8. Educational Support Processes**

High quality schools have an educational program that includes a well-defined plan of operation; understood by educators, students and families. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the goals of 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.

***School meetings, TPP, school design team and collaboration of teacher leadership and cooperation meet the criteria.***

2. Describe how instructional content and methodology will be continuously improved.

***School meetings, TPP, school design team and collaboration of teacher leadership and cooperation meet the criteria.***

3. Explain the procedures for ensuring the health and safety of students.

***Meets requirements.***

4. Identify the procedures for school discipline, suspension, and potential removal of a student from the program.

***School discipline procedures center around “restorative justice” and democratic problem solving practices. Are procedures referenced for removal from school.***

5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities and emergency contacts. ***Not fully identified yet; has 1.5 years before opening.***

***Meets expectations however do the SMS’s indicated record and report information relevant to a school where personalized learning and PBL are primary model versus legacy practices.***

6. Identify key student services and how they will be managed.

***Will rely primarily on staff and community support services which is fine, however, how staff time is allocated to interface and coordinate with such resources will be critical.***

7. Describe how key processes that support daily operations will be managed.

***Obviously different from legacy management model however, teacher leadership of the school is their solution.***

8. Describe the special education program to be provided, pupil identification, development of IEP's, delivery of special education and related services and program financing.

***TPP as described should be adequate, however, should consider learning more about and addressing student neurodiversity as a better way to serve all students.*** [Special Education is Broken \(Ed Week\)](#)

[Neurodiveristy explained](#) and how we are different.

9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity to attend the charter school.

***Meets expectations.***

**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:	Teacher leadership and collaboration in design and operations. Emphasis on democratic processes and student empowerment. Ongoing assessment and reliance on other than State required testing and appears more focused on growth versus deficits.
Concerns/Questions:	How will Skyward for example, address the progress of student learning? More detail could be provided on the day-to-day management processes of this teacher powered school. May want to examine recent research on neurodiversity and implications for handling behavior as well as academic performance.

## **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 school's financial plan.

***Currently meets expectations but more specifics will be necessary during the Planning Year.***

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.

***Pending Planning Year.***

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.

***There may be more need for capital than currently estimated. Significant efforts should be made to raise additional funds prior to opening.***

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.

***Pending grant approval.***

5. Provide a description of the school facility, or proposed facility and its layout including the number and size of classrooms, common areas, and recreational space and the level of accessibility for disabled students and staff.

***Meets expectations at this time.***

6. Describe the transportation arrangements made for the charter school students and/or the consideration given to how the school will ensure equal access if transportation is not provided. (Charter schools, by law, are not required to provide transportation).

***Are there other OEO or 2r charters that are providing transportation and if so, are they able to do so with just OEO per student revenue? How?***

7. Describe how food services will be provided for students.

***Meets expectations at this time.***

8. Provide revenue and expenditure budgets for the first three years of operation.

**Okay**

9. Provide a projected cash flow statement for the planning stage and the first year of operation.

**Okay**

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

**Meets requirements**

11. Show how the budget addresses the unique aspects of the school

**Meets requirements**

12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).

**Meets requirements**

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

**Should be reviewed and revisited during early phases of Planning Year.**

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:	5. Great vision for layout and goals of the school.
Concerns/Questions:	<p>2. It isn't clear who/how the financials will be handled, e.g. software, financial statements, accounts payable/receivable. Will this for example be a combined position of executive assistant and financial manager? Could use more detail on how financials will be handled and by whom. (See comment above.) Advise contracting for such services.</p> <p>3. Cash flow could be an issue. State aides wouldn't be receivable for many months and grant money is reimbursable only after expended and then claimed from DPI. What funds will be available for startup until CLD can get charter funds reimbursed from DPI. Not payable until expenditures claimed. Could use more detail on fundraising especially if opening in 2022.</p> <p>4. Where would revenue come from if no grant to plan and open?</p> <p>6. Transportation is commendable but not reflected in budget expense. May want to waive transportation for several years.</p> <p>7. Several unknowns here e.g. assuming space available for gardens, cost of and preparation of locally grown foods. Are there other OEO or 2r charters doing this? Badger Rock does to certain extent, however are an Instrumentality and have space for gardens.</p>

	8. Budget worksheets: 10. Budget has little flexibility in cash flow. 13. Consider significantly increasing fundraising.
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### **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. Exhibit an understanding of the legal requirements for operating a public charter school.

***Meets expectations at this time.***

2. Describe the policies and procedures developed to address these requirements.

***TPP and leadership team. Meets expectations at this time.***

3. Describe the level and types of insurance coverage the board will provide.

***Meets expectations at this time.***

4. Explain the school's student records plan for developing and maintaining records on student achievement, health, emergency contact, high school credit, activities, etc.

***Meets expectations at this time.***

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

***Meets expectations at this time.***

**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.Meets criteria. Can one assume CLD will take advantage of statutory language for all other 118-121 waivers? Good commitment to "continuous improvement."
Concerns/Questions:	Can Quickbooks be setup to interface with state's WUFAR system Does insurance cover "errors and omissions?"

Phase II Proposal Evaluation Summary

Please use your assessment of the ten criteria to make an evaluative judgment of the proposal below.

*(Electronically highlight your decision)*

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.
- Satisfactory - The proposal is sufficiently well developed.

**Application is not acceptable and should not be given further consideration for charter status. Use the space below to indicate rationale. (can choose more than one in this category)**

- Unsatisfactory - The proposal requires extensive work and the planning group should reevaluate its goals for the program.
- Does not fit within the OEO's chartering priorities.
- The proposal is lacking research to support the program design.

Rationale:

**Application has potential but additional information and work is required. (Use the space provided to specify area requiring revision).**

- 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:

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.
  - There are items that will require clarification and expanded responses during/after Planning Year

This is an innovative and dynamic charter school proposal and Developers should be authorized to develop the Milestone Democratic School. I am rating this as acceptable because it addresses most of the critical components required in the application outline.

It is a school design that directly addresses many of society's greatest issues including:

1. Interpersonal and emotional connections that are a necessity for human happiness and fulfillment. This assumes far more "personal, face to face" time for connections versus the current wave of social/digital media connections;
2. Providing an engaged environment that will develop critical thinking and problem solving skills;
3. Collaboration and problem solving with others;
4. Direct application of skills to community needs and learning skills from the community;
5. Shared decision making, democratic modeling and direct participation in the design and operation of the school;

6. Principles of Restorative Justice that address the need for fairness and equality throughout society;

Rather than replicate specific areas of strengths and areas for improvement here, the reader should go to the various summary sections of the Evaluation Rubric above.

**Budget:**

The budget could use more detail:

Expenses

1. Why are there no fringes included for admin/staff?
2. Building maintenance is similar from year 1 (16 students) to year 5 with 170 student.
3. Is there replication with Building maintenance salary (\$24,000) with Building maintenance (\$10,000) and Building repair (\$20,000)
4. Audit expenses appear high for such a small enterprise.
5. In year 3-5 consulting costs drop way off when several new staff would be hired. Is it assumed that current staff will train new staff and be full time advisors? If so reconsider as outside coaching will likely be necessary since lead teachers will be fully occupied.
6. Building repair: This cost could conceivably be included in lease costs.
7. What is difference in "food service wages" and food service preparation and meals' costs?
8. On what assumptions are the equipment repair costs based?
9. Phone and internet charges are confusing.
10. Pupil transportation: what are assumptions/plans?
11. Revenues and expenses are equal. Should there not be a surplus built in for unanticipated expenses?

It would be great to see projected budget for their Planning Year should they be funded.

In addition to some of the suggestions made above, here are a few more you may want to consider:

[Lives in the Balance--Ross Green](#) Fostering collaboration and inspiring change

Personal body awareness and effective communication between body, mind, and feelings. An approach to mindful awareness.

[Neurodiveristy explained](#)

[What is Interoception?](#)

[Interoceptive Awareness Skills for Emotion Regulation: Theory and Approach of Mindful Awareness in Body-Oriented Therapy \(MABT\)](#)

[Interoception and Mindfulness](#)

[When interoception helps to overcome negative feelings caused by social exclusion](#)



Consider partnering with the Center for Healthy Minds at UW-Madison to integrate Mindfulness practices with staff and students. Consider writing in budget for longitudinal research on it's impact in Milestone Democratic School.

[Center for Healthy Minds](#)

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- After receiving recommendations from the Evaluation Committee, the Associate Director shall review the results and make a summary recommendation to the UW 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, if applicable.
- To the greatest extent possible, Evaluation Committee members should strive to reach consensus on a final recommendation of whether a proposal should or should not be approved for authorization. If consensus cannot be reached the Associate Director will review recommendations and rationales from each reviewer and determine the summary recommendation to be made to the UW System President. The Evaluation Committee will be notified of the Associate Director's summary recommendation.
- If a recommendation for authorization is accepted, then contract negotiations will commence.

### Phase II Rubric

<b>Name of Proposed School:</b>	Community   Learning   Design
<b>Proposed Location of School:</b>	Madison, WI
<b>Date:</b>	1/16/2019
<b>Name of Reviewer:</b>	

**FINAL OVERALL RECOMMENDATION** (*complete this at the conclusion of the entire process by electronically highlighting your final recommendation*)

- Accept for further consideration of authorization
- Deny
- Resubmit in the future 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 summary judgement of the proposal.

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

The Strengths and Concerns boxes at the end of each section provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, so please be specific and focused in your comments.

The following definitions should guide the ratings:

**Meets the Standard:**

The response reflects a meaningful, 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 and readiness to open and operate a quality charter school.

### **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 as well as satisfies the authorizing priorities of the OEO.

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 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(s), telephone number(s), and email address(s) 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 serve, 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:	There is strong alignment between what they say they are going to do (focus on student voice) and what they have done (include students). Evidence for their work in the fact that they had students contribute already to the school design.
Concerns/Questions:	

## 2. Governance and Leadership

For long term development the school must have 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:	
Concerns/Questions:	

### **3. Community and Family Engagement**

For any school to maintain long term viability it must incorporate community involvement, be responsive to the community, and work 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 developed.
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:	specific in terms of the community they will serve and how they will seek community partners
Concerns/Questions:	This is my main area of concern. They did not provide evidence that they have the support from the community. I think the demonstration of diversity on their board, diversity in additional teachers, and clear signal from community members should be a contingency for authorization after the planning year.

#### **4. Marketing, Recruiting, and Admissions**

A viable marketing and recruitment plan is necessary to the success of opening a new independent charter school. 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 among 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:	Clarified in the interview and written response
Concerns/Questions:	The marketing strategy seems basic, which is not necessarily bad, but it is hard to judge whether it'll be effective.

## 5. Faculty and Staff

High quality school programs are based on effective staff recruitment and on-going 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:	Small staff will allow 1-1 coaching and development
Concerns/Questions:	How will they balance the certifications necessary to complete standards in particular content areas, like biology, for high school students? How will they get training in helping students set goals? What support will teachers have for handling issues as they emerge?



## 6. Curriculum and Instruction

High quality schools have integrated models of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that will meet the needs of the students the school intends to serve? Does the applicant cite research support for the 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:	
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 does the assessment plan incorporate 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:	Continua on SEL, democratic deliberation, and design
Concerns/Questions:	There are a lot of details to sort out in terms of translating student experience into after graduation, including setting graduation requirements, but the school will likely start small enough and they have the capacity to do this.

## 8. Educational Support Processes

High quality schools have an educational program that includes a well-defined plan of operation; understood by educators, students and families. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the goals of 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 student 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, pupil identification, development of IEP's, 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 to attend the charter school.

**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:	restorative circles for discipline, small numbers will accommodate diversity
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 school's 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 including the number and size of classrooms, common areas, and recreational space and the level of accessibility for disabled students and staff.
6. Describe the transportation arrangements made for the charter school students and/or the consideration given to how the school will ensure equal access if transportation is not provided. (Charter schools, by law, are not required to provide transportation).
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.)**

(I have no informed opinion on this one)

Strengths:	
Concerns/Questions:	Not clear how they will fund long hours of having their building/space open.

### **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. Exhibit an understanding of 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 records on student achievement, health, emergency contact, high school credit, activities, etc.
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:	

Phase II Proposal Evaluation Summary

Please use your assessment of the ten criteria to make an evaluative judgment of the proposal below.

*(Electronically highlight your decision)*

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.
- Satisfactory - The proposal is sufficiently well developed.

**Application is not acceptable and should not be given further consideration for charter status. Use the space below to indicate rationale. (can choose more than one in this category)**

- Unsatisfactory - The proposal requires extensive work and the planning group should reevaluate its goals for the program.
- Does not fit within the OEO's chartering priorities.
- The proposal is lacking research to support the program design.

Rationale:

**Application has potential but additional information and work is required. (Use the space provided to specify area requiring revision).**

- 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:

Good things - this is clearly a contribution to the district. The schooling model is significantly different from what is already available. The methods and mission are well aligned. Strong educational background from the two founders.

Critiques - They do not in the application and did not in their interview provide evidence that they have the support from the community. The essential intersection of community and democracy raises questions about whether they will be successful.

Sean Anderson's follow up communication is compelling as to his commitment to anti-racist pedagogies and school design, and I think with more evidence of community support there is strong potential for this to be a successful project.

We asked them the question about designing for succession. I think given Mike McCabe's history of only staying in positions for 1-2 years, I would also suggest this should be an area where he specifically provide evidence of how long he is committing to stay with MDS and how he will support Sean if/when he decides to move on.

My recommendation would be to authorize a one-year planning grant with continued authorization contingent on demonstrating diversity on their board (and community members on the board), diversity in additional teachers, and deep, rich connections with influential community members to support their school.

## **Phase II APPLICATION EVALUATION REVIEWER GUIDE**

Please consider the major elements of the proposal as outlined below and evaluate the Phase II application based on how well the applicant has responded in a meaningful and informative manner about how the proposed new charter school will be operated.

OEO's rubric model does not use a numeric rating system, instead reliance is placed on each reviewer's qualitative assessment and summary judgment of the elements within each section and final recommendation based on the overall merit and quality of the proposal and additional information. Information gleaned from applicant interviews, requests for clarification and committee discussions should also be considered when making a final recommendation. Therefore, reviewers should delay decision on their overall final recommendation until the applicant interviews and committee discussions have concluded. The Phase II evaluation rubric requires a final *evaluation summary* based on the merits of the proposal itself. However, the final overall recommendation should be delayed until the conclusion of the entire evaluation process.

Process to be followed to incorporate reviewer comments and final recommendation:

- All reviewers will be expected to make a summary judgment based on the merits of the proposal itself using the Phase II rubric. Additionally, at the conclusion of the entire process, all reviewers will be expected to provide a final overall recommendation using their summary judgment of the written proposal as well as information gleaned from applicant interviews and committee discussions.
- If the Evaluation Committee decides that additional clarification is necessary, the Associate Director shall secure the requested information from the applicant and forward to the Evaluation Committee prior to submission of final recommendations to the OEO.
- After receiving recommendations from the Evaluation Committee, the Associate Director shall review the results and make a summary recommendation to the UW 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, if applicable.
- To the greatest extent possible, Evaluation Committee members should strive to reach consensus on a final recommendation of whether a proposal should or should not be approved for authorization. If consensus cannot be reached the Associate Director will review recommendations and rationales from each reviewer and determine the summary recommendation to be made to the UW System President. The Evaluation Committee will be notified of the Associate Director's summary recommendation.
- If a recommendation for authorization is accepted, then contract negotiations will commence.

**Phase II Rubric**

<b>Name of Proposed School:</b>	Milestone Democratic School
<b>Proposed Location of School:</b>	City of Madison – location undisclosed
<b>Date:</b>	January 8, 2019

**FINAL OVERALL RECOMMENDATION** (*complete this at the conclusion of the entire process by electronically highlighting your final recommendation*)

- ☐ Accept for further consideration of authorization
- ☒ **Deny**
- ☐ Resubmit in the future 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 summary judgement of the proposal.

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

The Strengths and Concerns boxes at the end of each section provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, so please be specific and focused in your comments.

The following definitions should guide the ratings:

**Meets the Standard:**

The response reflects a meaningful, 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 and readiness to open and operate a quality charter school.



### **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 as well as satisfies the authorizing priorities of the OEO.

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 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(s), telephone number(s), and email address(s) 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 serve, 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:	<p>I think in general they met all the standard criteria and exhibited some really good strengths in their planning process.</p> <p>I really liked that the directors workshopped the idea with their peers at different conferences.</p> <p>I also liked that they created a design team operating in a similar fashion as they see the school operating.</p>
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Concerns/Questions:

Are students going to be able to shift from the “standard” schooling practices to the practices outlined in the proposal?

I am not sure that the school is considering the potential for multiple life-experiences (class, race/ethnicity, gender, etc.) and how that may affect the democratic process or definitions of “un-safe,” “professional.” – I am concerned that if not thought through this may marginalized students.

Research and connection to best practice seemed to be weak and all over the place, hard for me to make the connection with either research or best practices.

## 2. Governance and Leadership

For long term development the school must have 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:	
------------	--



Concerns/Questions:	<p>Question regarding #2 – with a strong emphasis on democratic deliberation, I think it is extremely important to have strong facilitation skills, to facilitate dialogue beyond Robert’s Rules.</p> <p>Question regarding #5 – with a strong emphasis on the democratic process, I would have liked to see a more robust process for selecting board members – as written it seems to not align with the democratic process.</p> <p>Question regarding #6 – I am concerned that the School Meetings not being accessible to certain people and not offering multiple ways to engage.</p>
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### **3. Community and Family Engagement**

For any school to maintain long term viability it must incorporate community involvement, be responsive to the community, and work 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 developed.
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:	
Concerns/Questions:	<p>I am also really concerned about the student population identified and how the school will be flexible enough to accommodate the experiences and cultural backgrounds of the students without indoctrinating them into perspectives not aligned with their backgrounds</p> <p>I am interested as understand how this notion of community fits into the democratic process, within this section there seemed to not be as much emphasis of including them into the process and more of an emphasis around partnership. What is the difference between community and partnership?</p>

#### **4. Marketing, Recruiting, and Admissions**

A viable marketing and recruitment plan is necessary to the success of opening a new independent charter school. 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 among 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:	
Concerns/Questions:	I don't think the plan is robust and thought out in relation to the mission of their school – with such a unique mission and school, I am interested in how the marketing plan will help to set themselves a part of the other schools and more importantly why their school is a place that students and families consider. Specifically, when their target populations are minoritized students.



## 5. Faculty and Staff

High quality school programs are based on effective staff recruitment and on-going 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:	
Concerns/Questions:	A lot of the answers lack criterion or further explanation about the process. I feel like more thought and planning is needed to be paid to this section.

## 6. Curriculum and Instruction

High quality schools have integrated models of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that will meet the needs of the students the school intends to serve? Does the applicant cite research support for the 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:	
Concerns/Questions:	<p>The curriculum and instruction presented seems to be still at a philosophical level, more description around the details of what is taking place in the learning and how the learning is manifesting in the school.</p> <p>I am interested in understanding what “democratic learning” means?</p> <p>There is also an assumption that students have bought into this “daily life” of the school – for the curriculum to be effective. I go back to my early concern of how easy or difficult will the student be able to accept this new type of schooling after having a “standard” schooling.</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 does the assessment plan incorporate 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:	
Concerns/Questions:	Very little evidence or justification for answers to each question, which is concerning, and I do not feel comfortable having students experience a school that does not either a set criterion or process in this area.

## **8. Educational Support Processes**

High quality schools have an educational program that includes a well-defined plan of operation; understood by educators, students and families. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the goals of 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 student 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, pupil identification, development of IEP's, 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 to attend the charter school.

**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:	Very little evidence or justification for answers to each question, which is concerning and do not feel comfortable having students experience a school that does not either a set criterion or process about this area.

## **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 school's 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 including the number and size of classrooms, common areas, and recreational space and the level of accessibility for disabled students and staff.
6. Describe the transportation arrangements made for the charter school students and/or the consideration given to how the school will ensure equal access if transportation is not provided. (Charter schools, by law, are not required to provide transportation).
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:	I really like some of the ideas in this section, I think if thought through could be very innovative.
Concerns/Questions:	Just like the previous sections – the planning that is portrayed in the proposal still seems philosophical and not ready for implementation stage.

### **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. Exhibit an understanding of 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 records on student achievement, health, emergency contact, high school credit, activities, etc.
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:	Just like the previous sections – the planning that is portrayed in the proposal still seems philosophical and not ready for implementation stage.

Phase II Proposal Evaluation Summary

Please use your assessment of the ten criteria to make an evaluative judgment of the proposal below.

*(Electronically highlight your decision)*

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.
- ☐ Satisfactory - The proposal is sufficiently well developed.

**Application is not acceptable and should not be given further consideration for charter status. Use the space below to indicate rationale. (can choose more than one in this category)**

- ☐ Unsatisfactory - The proposal requires extensive work and the planning group should reevaluate its goals for the program.
- ☐ Does not fit within the OEO's chartering priorities.
- ☐ The proposal is lacking research to support the program design.

***Rationale: The idea, mission and vision of this school is very interesting and innovative, and I believe requires a lot of more thought and planning to be able to successfully implement, which was not demonstrated in the proposal. There were multiple times where I believe that the proposal was still at a philosophical stage and did not engage in the actual implementation of the philosophy outlined. I had major concerns with some of the processes and it not being "democratic" therefore being misaligned with the school's mission and vision. I also had concerns about the ability for the school to honor the experiences of the students they were seeking to enroll especially with the mission and vision in mind.***

***I really do like the idea of the proposed school but do not feel comfortable with what was presented, I think the proposal and planning needs significant work. I hope the work continues to be done on the proposal and the school.***

**Application has potential but additional information and work is required. (Use the space provided to specify area requiring revision).**

- ☐ 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 EVALUATION REVIEWER GUIDE

Please consider the major elements of the proposal as outlined below and evaluate the Phase II application based on how well the applicant has responded in a meaningful and informative manner about how the proposed new charter school will be operated.

OEO's rubric model does not use a numeric rating system, instead reliance is placed on each reviewer's qualitative assessment and summary judgment of the elements within each section and final recommendation based on the overall merit and quality of the proposal and additional information. Information gleaned from applicant interviews, requests for clarification and committee discussions should also be considered when making a final recommendation. Therefore, reviewers should delay decision on their overall final recommendation until the applicant interviews and committee discussions have concluded. The Phase II evaluation rubric requires a final *evaluation summary* based on the merits of the proposal itself. However, the final overall recommendation should be delayed until the conclusion of the entire evaluation process.

Process to be followed to incorporate reviewer comments and final recommendation:

- All reviewers will be expected to make a summary judgment based on the merits of the proposal itself using the Phase II rubric. Additionally, at the conclusion of the entire process, all reviewers will be expected to provide a final overall recommendation using their summary judgment of the written proposal as well as information gleaned from applicant interviews and committee discussions.
- If the Evaluation Committee decides that additional clarification is necessary, the Associate Director shall secure the requested information from the applicant and forward to the Evaluation Committee prior to submission of final recommendations to the OEO.
- After receiving recommendations from the Evaluation Committee, the Associate Director shall review the results and make a summary recommendation to the UW 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, if applicable.
- To the greatest extent possible, Evaluation Committee members should strive to reach consensus on a final recommendation of whether a proposal should or should not be approved for authorization. If consensus cannot be reached the Associate Director will review recommendations and rationales from each reviewer and determine the summary recommendation to be made to the UW System President. The Evaluation Committee will be notified of the Associate Director's summary recommendation.
- If a recommendation for authorization is accepted, then contract negotiations will commence.

**Phase II Rubric**

<b>Name of Proposed School:</b>	Community Learning Design
<b>Proposed Location of School:</b>	422 Leslie Drive, Edgerton, WI 53534
<b>Date:</b>	1-24-19
<b>Name of Reviewer:</b>	

**FINAL OVERALL RECOMMENDATION** (*complete this at the conclusion of the entire process by electronically highlighting your final recommendation*)

☒ **Accept for further consideration of authorization**

☐ **Deny**

☐ **Resubmit in the future 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 summary judgement of the proposal.

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

The Strengths and Concerns boxes at the end of each section provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, so please be specific and focused in your comments.

The following definitions should guide the ratings:

**Meets the Standard:**

The response reflects a meaningful, 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 and readiness to open and operate a quality charter school.

### **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 as well as satisfies the authorizing priorities of the OEO.

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 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(s), telephone number(s), and email address(s) 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 serve, 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:	Engaging Learning built in students voices and community connections. The youth voice is imperative to designing curriculums that reach full teaching potentials. Small group engagement allows a better format for unique but sometimes soft voices to be heard. I appreciated the one-on-one feedback.
Concerns/Questions:	



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## **2. Governance and Leadership**

For long term development the school must have 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:	Board Selection
Concerns/Questions:	Allowing a student voice, family, guardian delegate and a professional teacher

	to be a voting member on the board creates an opportunity for empowerment, authority and inclusion.
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### **3. Community and Family Engagement**

For any school to maintain long term viability it must incorporate community involvement, be responsive to the community, and work 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 developed.
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:	Community Engagement for diversity/inclusion in Madison.
Concerns/Questions:	Can you please elaborate on the 2 or more races identification? Also, will you be including an internship opportunity or participate in a youth in governance model with County Government?

#### **4. Marketing, Recruiting, and Admissions**

A viable marketing and recruitment plan is necessary to the success of opening a new independent charter school. 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 among 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:	Will prominently celebrate the racial/ethnic diversity. A core strength for the organization.
Concerns/Questions:	

## 5. Faculty and Staff

High quality school programs are based on effective staff recruitment and on-going 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:	Contracting with the local YWCA for Restorative Justice Practices for faculty and teacher to adhere to the concept.
Concerns/Questions:	Will you implement recommendations from the training with student disciplinary dispositions? Will you be partnering or entering a Memorandum of Understanding with the Edgerton Police Dept.

## **6. Curriculum and Instruction**

High quality schools have integrated models of curriculum and instruction. From what is described in the application, have the applicants developed a curriculum that will meet the needs of the students the school intends to serve? Does the applicant cite research support for the 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:	The high school graduation or grade promotion identification standards and crafting continuum of specific learning goals cause equivalency for career pathways is part of the design.
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 does the assessment plan incorporate 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:	The on-going interactive, participatory design for parents, teachers, students, staff in review of annually along with the community stakeholders.
Concerns/Questions:	

## 8. Educational Support Processes

High quality schools have an educational program that includes a well-defined plan of operation; understood by educators, students and families. Does the plan of operation suggest a daily organizational structure that is meaningful, meets accepted standards for health and safety, and reflects the goals of 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 student 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, pupil identification, development of IEP's, 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 to attend the charter school.

**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:	Conflict resolution and justice practices will be noted in Restorative Justice Practices and youth led intervention, peer mediation, a justice committee made up of student volunteers.
Concerns/Questions:	How will you maintain the data for Restorative Justice Dispositions versus the traditional expungement? Will you provide some narratives for cases that were referred to Restorative Justice Circles that outcomes may have led to a more severe discipline?



## **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 school's 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 including the number and size of classrooms, common areas, and recreational space and the level of accessibility for disabled students and staff.
6. Describe the transportation arrangements made for the charter school students and/or the consideration given to how the school will ensure equal access if transportation is not provided. (Charter schools, by law, are not required to provide transportation).
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:	How far of a distance are students walking to and from school? I would suggest having the Bus stop in front of the school and not having students walk through communities to reach school especially if they do not reside in the neighborhood.  I want all Students to arrive to school and back home safely.

### 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. Exhibit an understanding of 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 records on student achievement, health, emergency contact, high school credit, activities, etc.
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:	I like the weekly school-wide meetings will assist in developing an understanding of the students rights. I like the informal and formal process for notify the student.
Concerns/Questions:	Will a Student Handbook be available on the first day for parents and students to receive. If yes, will it be available electronic and hard copies?  How will members of the Design team be selected to assist with the graduation standards and criteria?

## Phase II Proposal Evaluation Summary

Please use your assessment of the ten criteria to make an evaluative judgment of the proposal below.

*(Electronically highlight your decision)*

**Application is acceptable and should be given further consideration 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 all students, especially those that are traditionally underserved.

Satisfactory - The proposal is sufficiently well developed.

**Application is not acceptable and should not be given further consideration for charter status. Use the space below to indicate rationale. (can choose more than one in this category)**

- ☐ Unsatisfactory - The proposal requires extensive work and the planning group should reevaluate its goals for the program.
- ☐ Does not fit within the OEO's chartering priorities.
- ☐ The proposal is lacking research to support the program design.

Rationale:

**Application has potential but additional information and work is required. (Use the space provided to specify area requiring revision).**

- ☐ 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:

February 15, 2019

Michael McCabe  
Sean Anderson  
Community Learning Design, Inc.

Via Email: [Michael.mccabe@communitylearningdesign.org](mailto:Michael.mccabe@communitylearningdesign.org)

Via Email: [sean.anderson@communitylearningdesign.org](mailto:sean.anderson@communitylearningdesign.org)

Dear Michael and Sean:

Thank you for submission of the Phase II application to establish Milestone Democratic School. After careful review and consideration by the evaluation committee and staff of the Office of Educational Opportunity, I would like to inform you that your Phase II application has been approved with contingencies.

The evaluation committee as well as OEO staff believe the proposed school is innovative and has great potential to advance educational equity, especially for our most underserved students. However, there are concerns about the lack of diversity of the adults involved in the planning to-date and those on the board of Community Learning Design, Inc. There are also additional concerns about the extent that communities and families of the target populations have been engaged thus far and will be engaged moving forward. While the school's plan is innovative and seeks to address issues of inequity, student engagement and personal development, these areas of concern must be addressed to the satisfaction of the OEO prior to OEO's commitment to commence contract negotiations.

In an effort to further determine the readiness and preparedness of Community Learning Design, Inc. to open and effectively operate the proposed school, the OEO will make an assessment based on the following factors prior to inviting the organization to enter contract negotiations:

- The diversity of the board of Community Learning Design, Inc. and meaningful involvement of adults from diverse backgrounds during the planning process.
- Authentic and meaningful engagement with the families and communities the school intends to serve including involvement of parents of color and parents of potential students during the planning process.
- The development and implementation of a robust plan for professional development of the CLD board including training in cultural competency, strategies for authentic engagement with communities of color, restorative justice and other areas that are pivotal to the success of the school.
- Identification of a suitable school location that is accessible to all students and is conducive to the type of learning environment the school seeks to create.

Throughout the planning period, the OEO will gauge progress towards these benchmarks. If the OEO is not satisfied with CLD's progress in these areas and is not reasonably confident in the organization's ability to achieve its stated objectives, CLD will not be invited to enter contract negotiations for the establishment of Milestone Democratic School. If Community Learning Design addresses these areas of concern to the satisfaction of the OEO, the organization will be invited to negotiate a contract for the

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OFFICE OF  
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OPPORTUNITY

establishment of Milestone Democratic School.

Thank you for your work on the proposal and for your participation in the evaluation process. If you have any questions regarding this information, please contact Gary Bennett at [gbennett@uwsa.edu](mailto:gbennett@uwsa.edu).

Thank you,

A handwritten signature in black ink that reads 'Latoya M. Holiday'.

Latoya M. Holiday, Associate Director