

Prospectus Part A

Name of Organization

Isthmus Montessori Academy

Year Founded

2,012

First and Last Name of Primary Applicant

Melissa Droessler

Address

Email

Phone

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

Name	Professional Affiliation	Role in Proposed School
Melissa Droessler	Educator and School Administrator	Educator, Administration team, founder
Carrie Marlette	Educator and School Administrator	Educator, Administration team, founder
Tim Peeremboom	School Psychologist and Positive Behavior Support Coach	Administrator
Troy Vosseller	Founder of Gener8tor	Governance Board
Ingrid Andersson	Certified Nurse Midwife	Governance Board
Jessica Wortman	Occupational Therapist	Governance Board

Guy Mueller

Metropolitan Municipal Fiscal Policy Expert, Watershed
Commissioner, landscape and urban designer

Governance Board

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

Isthmus Montessori Academy Public School will be the public organization created by the vision and mission of Isthmus Montessori Academy. This organization began with the intention of expanding access to the AMI Montessori method of education for children and families who have been historically priced out of the method within communities where Montessori is only available through private-pay. This is a non-profit created for this proposed school.

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

- [ima_irs_501c3.pdf](#)
- [ima_incorporation.pdf](#)

Do you currently operate a school?

No

Is your proposal a

Fresh Start Campus (Totally new school)

Where would the school be located?

Madison

When would students first enroll?

Academic Year 2018-2019

Have you applied for authorization of this concept before?

Yes

What was the outcome?

The proposal was accepted in January 2017 and will be voted to be rescinded at the October 2017 MMSD Board Meeting.

Who was the authorizer?

Madison Metropolitan School District

When was the application?

The process began in 2012 with the first application submitted in 2014

Has your proposal been changed since the last application, and if so how?

The proposal was changed multiple times in working with the district. These changes reflected the challenges faced by the district to accept alternative programs and school communities within the same parameters of existing schools within the district.

ISTHMUS MONTESSORI ACADEMY PUBLIC SCHOOL PROSPECTUS PART B

October 26, 2017

1. Mission/Vision Statement for the Charter School

a. What is the mission of the school?

IMA's mission is to open Madison's first AMI Montessori public school and the first fully inclusive and accessible Montessori school in the Madison community, reflecting the racial and socioeconomic demographics of the Madison Metropolitan School District. By offering this long-proven world-renowned method of education as a free public option to the children of Madison, IMAPS can be an agent of major change in this community. For many families this would be the first opportunity to have access to a different method of education, for many children this could be the first chance to discover a love of learning, and for the city of Madison, this could serve as a case study in incorporating evidence-based methods into new communities.

While Madison is served by seven popular Montessori schools, collectively educating over 300 students. These schools are tuition-based and families must private pay, sometimes with the help of small scholarships. This is in direct contrast to the philosophic origins of Montessori education as an urban school for poor children. Isthmus Montessori Academy was born of a vision of expanded access to the AMI Montessori Method until such time as every child who might benefit is served by the model.—IMA founders opened the school as a 501(c)(3) nonprofit, located the school within a community in need, and completed all necessary requirements to be able to accept Wisconsin Shares, a public childcare subsidy for low-income families. The school engages in targeted fundraising to expand access by offering some financial assistance to 40% of families each year, but only by operating as a public school can IMA truly have the maximum impact and achieve it's goals of equity and inclusion

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

This school would be the first to offer Madison families public, tuition-free access to the AMI Montessori method, an evidence-based model of education marked by multi-year, mixed-age classrooms, 100% differentiated curriculum, and a focus on social and emotional development, in which children have the freedom and responsibility to direct their own learning.

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

The primary goal in pursuing a charter is to expand access to the AMI Montessori method and disrupt the historical pattern of access only by families of means. Success in this goal of equity and access would be a student body reflecting the diversity of the children in the Madison community, and an environment that is actively inclusive of these communities as reflected by family participation in school activities and in the demographics of the teaching staff.

Success will also be demonstrated by student, family, and staff satisfaction with their AMI Montessori school. At the end of five years, success in this measure will be demonstrated by the majority of

students attending for at least three consecutive years, most staff members remaining for at least three years, and at least 20% of staff hired advancing in their Montessori training from one year to the next.

Because of the power of AMI Montessori to address achievement gaps, IMAPS will measure academic success both by individual student progress and by a reduction or elimination of achievement gaps from the Year One baseline to Year Five assessments. Year Five of the charter will also be the second year the school includes an IB High School, and the success of this component would 100% of IB 12th graders graduating.

Finally, this school can only be considered successful if it achieves a high-fidelity implementation of AMI methods and standards. Success will be demonstrated by continual accreditation of the curriculum, classrooms, and of the outdoor environment, which will include an urban farm operated by the school community towards achievement of education goals, sustainability, and nutrition goals.

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

As a public AMI Montessori school, IMAPS will accelerate outcomes for all its students through customized learning plans and systems of support that allow students, of every ability, to reach their highest potential. Currently, no public schools in Madison offer this approach, despite decades of research supporting Montessori as an international best practice. IMAPS will be the first school to bring this method to Madison's public educational sector.

The Montessori method improves test scores and closes achievement gaps both by making children feel motivated to learn and by providing opportunities for children to follow their own interests and develop deep understanding of the subject matter, while also developing transferable skills. The customized education plans minimize personal knowledge gaps between subject areas as well as knowledge and achievement gaps between children with different socioeconomic, ethnic, language, or ability backgrounds. Integral to the method is a two-generation approach to education, recognizing that the family home is the first and most constant educational environment. Montessori education explicitly takes an asset based approach to differences and aims to create a positive, welcoming, safe environment that honors the individualities of students and their families.

2. Description of the school/program.

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

- Ages 4-15, Grades 4K-9 in years 1-3
- Ages 4-18, Grades 4K-12 in years 4-5; grades 10-12 will be Montessori IB High School

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

In year one, the student body is projected to be approximately 175, and will expand annually to maximum capacity of 500 students in the fifth year. Year one will begin with two primary classrooms, two lower elementary classrooms, one upper elementary classroom, and one adolescent classroom for a total of six classrooms, each headed by a lead teacher certified by an AMI Montessori program. Each classroom will have a part-time assistant for a total of 1.5 educators to approximately 34 children. Each classroom assistant will be either a special education assistant or a bilingual resource specialist. Classroom staff will be additionally supported by the school's two special education teachers and an additional special education assistant. A full-time administrator and clerical support as well as 1.5 student services appointment will be implemented in the first year. As needs change, the school administrator as well as the governance council will adjust staffing to respond to student needs while being mindful of budgetary constraints.

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

Montessori is an internationally well-known, evidence-based, popular method of education. The existing Montessori schools in this community have waitlists for both scholarship and private-pay families. While we are confident in the demand among communities already familiar with Montessori education, we are committed to expanding access to Montessori education, which means intentionally working to overcome a history of racial and cultural exclusion and discrimination based in economic barriers. Accordingly, the organization's Inclusivity Action Plan, reflects a deep interest and robust roadmap for recruitment from communities that have been historically denied access due to cost and lack of information, including low income students, students of color, highly-mobile students and unaccompanied minors, students from immigrant and non-English-speaking families, and justice-involved youth.

The school location will be in the immediate vicinity of several low-income housing providers, serving populations including African American communities, Latino and undocumented communities, and refugee communities from Thailand, Vietnam, and Laos. IMA, Inc. will recruit for IMAPS students through open houses, free parenting seminars, informational booths at resource fairs and festivals, and through existing relationships with organizations with related missions such as 1800 Days, Women in Focus, and GSAFE, and through advertisements in newspapers reaching various groups of students/families. Additionally, IMA, Inc. as a community organization has sought to be an active supporter of organizations and initiatives that serve under-invested communities, and as a result of these efforts, we have seen an increased awareness and interest in Montessori among targeted populations.

Admission is available for any child whose family demonstrates an interest and support for the methodology. As a progressive, cumulative method of education, students likely to be best served are: children with prior Montessori experience, children starting in the earliest grade levels, and children whose families expect to remain within the model for multiple years. However, none of these will represent admissions criteria or preferences. Any child whose family demonstrates an interest in the method and believes Montessori to be an educationally appropriate placement is welcome. Applications in excess of capacity will be resolved through lottery, except for such lottery exemptions as provided by Wisconsin Statutes 118.40(3)(g)(1) through (3).

d. Special issues or characteristics of the school:

The public charter school will operate at the site of the ongoing nonprofit organization, Isthmus Montessori Academy, Inc. This nonprofit entity has a tri-part mission of providing a public school for children, a childcare facility for toddlers and infants, and a partner in the community. All of these functions are based at the same physical campus and all are rooted in the brain-based and human development research and educational methods approved by the Association Montessori Internationale. The three functions will from time to time overlap, but this is by design and to the benefit of the children. Because Montessori is a whole-child approach to education, families that are part of the school community are encouraged to learn more about principles that are the hallmarks of the educational method. Even outside of school time, the school serves as a resource for parents hoping to continue at home the school principles of grace and courtesy, freedom and responsibility, and positive discipline.

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

This school will implement the philosophy, curriculum, and instructional methods of Montessori education as upheld by the Association Montessori Internationale (AMI). Montessori education is rooted in a view of the child as innately curious and eager to learn. Instruction focuses on a child's social and personal development, and integrates fine arts, physical education, and developmentally appropriate discussions of each student's place and responsibility within their community. AMI Montessori is a holistic method of education that requires the educator to take into account a child's academic, social, emotional, language, and physical needs in guiding the child's learning. Children take ownership over their education, each developing his own path to mastery of the material. As children progress through their development and through the Montessori curriculum, their lens gradually shifts from personal to global, from simple to complex, from concrete to abstract, from familiar to unfamiliar.

While each child's path is different, all children complete their three-year cycle having met the benchmarks for academic, creative, and personal progress. Montessori education and assessments aligns with Common Core standards and Wisconsin state standards for science, mathematics, English, social studies, visual arts, theater, music, world languages, and physical education, all while meeting the objective of teaching to the whole child. For maximum value from the method, families are encouraged and supported in gaining a deeper understanding of childhood development and integrating Montessori principles and practices into their family lives. Any staff and programming that serves the students of the school in a childcare or extracurricular capacity will also be rooted in Montessori principles. Because this focus is constant, all portions of the school day, including lunch and recess, become opportunities for growth and learning, and so all of the day is appropriately categorized as instructional time.

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

The Montessori curriculum is not structured into "courses." Each day begins with time in the outdoor environment before the morning's three-hour work period. During the work period, students move about the classroom choosing their own work and completing lessons at their own pace, and in the order best suited to their own development. After this first work period, students lunch and participate

in recess/physical education in the outdoor environment, and then return to the class where the youngest children nap or rest and 5K-12 children engage in a second work period until the end of the day.

Within and across work periods, students have the freedom and responsibility to chart their own education, and to work with their teacher to design their individual Academic Career Plan. The Montessori guide works with an “album” that serves as a base curriculum, a selection of modules that the guide may present along with the Montessori materials in various configurations. As each child's needs are different, no two students learn exactly the same material, or access the same information in the same way, but will instead progress according to each student's plan and needs in order to meet the learning goals for the cycle. Students who complete a three-year cycle of coursework within a Montessori environment will have been exposed to the same subject matter as children in conventional schools, but often the Montessori children will have a deeper, more intuitive understanding of the material, because they were able to discover it on their own, explore at their own pace, and be responsible for integrating their new knowledge into their previous understanding of the material.

Student progression from one three-year class to another tends to align with learning benchmarks, but is actually based on stages of psychological development. This “social promotion” keeps students with the teacher, environment, and peer group that meets their developmental needs, while scaffolding to meet academic needs. This focus on independent exploration and individual progress requires a carefully prepared environment, precisely designed materials, and a specific approach to curriculum, each based in the science of brain development. An individualized education plan for each student is possible due to the rigorous training teachers receive in observation, assessment, and response to student needs using intervention techniques and materials from the classroom culture and environment.

In every year of operation, IMA has had students who are English Language Learners and students with special needs whose families had received an IEP through MMSD processes. Despite exemption as a private school, IMA has honored these IEP and language learning needs, and IMAPS will continue this tradition, meeting student needs within the framework of an inclusive classroom environment, and by the teacher following this cycle of work and learning:

AMI Montessori cycle of work and learning for teachers and students:

1. Teacher begins with careful and thorough observation.
2. From these observations, the teacher forms a developmental goal and learning objective.
3. The teacher makes an action plan to meet the needs of the child. This may include planning necessary lessons, adapting the environment, adapting the instructional presentation, and/or collaboration with other school or community or family resources.
4. The teacher implements the action plan.
5. Teacher observes, reflecting on the goal and the action plan, and setting a continuation or a new goal and action plan, as necessary

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?

Montessori classrooms are multi-year, multi-age classrooms, designed to allow a single teacher to work with 30 students, all with various strengths, needs, and abilities. This includes, without limitation: children who are English Language Learners (ELL) and children who have different abilities. This is the only method of education that offers 100% differentiated curriculum, allowing each child to learn each subject at exactly their own pace while developing skills in time-management, achieving learning goals by the end of the three-year cycle.

An increasing research base has for decades shown that children educated in fully implemented AMI Montessori programs demonstrate enhanced intellectual and social capacities, benefiting from the environment that is highly enriched, student-centered, and structured to support collaboration, creativity, and respect. This freedom and responsibility fosters a motivation to learn, and keeps students happy, busy and confident in their role and value within their community.

The attributes of Montessori curriculum and instruction lend themselves to fine-tuning and adjustment to align with inclusion principles and individual child needs. Social skills, leadership, and community services are all hallmarks of the program. This focus and flexibility is why study after study has shown AMI Montessori classrooms as effective tools in addressing challenges such as achievement, behavior, and opportunity gaps.

Here are just a few examples from the research supporting the use of Montessori to expand educational opportunities and produce improved educational outcomes:

Example #1

In a recently published seven-year study, Montessori education at an Arizona public charter school proved to be an extremely effective tool to address the achievement gap faced by impoverished Navajo children. Moreover, the study found that the Montessori method was able to deliver education and interventions in a way that is "congruent with Navajo cultural values." Children at the beginning of the study were an average of one year behind in both language and math concepts, but by the end of the pre/K program "virtually all" participants were performing at or above grade level in math.

Example #2

In 2011, the Milwaukee chapter of the NAACP produced a report on the state of Milwaukee public education, and specifically the opportunities and achievement for African American students in Milwaukee. The report concluded: "Prospects for educational achievement are brightest for Milwaukee Public School students who are enrolled in Montessori Schools."

The report drew on 2009-10 numbers:

Math proficiency:

Black students in MPS: 39.4%

Black students in MPS Montessori: 60.2%

Science proficiency

Black students in MPS: 32.4%

Black students in MPS Montessori: 66.1%

Reading proficiency:

Black students in WI: 57.6%

Black students in MPS: 50%

Black students in MPS Montessori: 69%

Latino students in MPS: 60%

Latino students in MPS Montessori: 81.3%

Language arts proficiency

Black students in MPS: 34.3%

Black students in MPS Montessori: 59.3%

Social studies proficiency

Black students in MPS: 47.3%

Black students in MPS Montessori: 82.2%

Example #3

Chantilly Montessori, in Charlotte, NC has 305 students who are representative of the CMS school district. Twenty-two percent are identified as economically disadvantaged; 30% of students are African American, 6% are Hispanic. The district-wide goal for reading disparities between racial group was set at 19% or lower, but district-wide it remains at 32%. At Chantilly Montessori, this gap is less than 12%. In the district, 76% of children are performing at or above grade level overall, but at Chantilly Montessori, 89% are, and 90.9% of students perform at or above grade level in Math.

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

Currently, the Board of Directors of IMA, Inc., a 501(c)(3) nonprofit, advises IMA in all functions of the organization. The IMA, Inc. board is guided by the goals and shared vision and mission of IMAPS and IMA, Inc.. IMA, Inc. Board will govern the public school in accordance with applicable local, state, and federal laws and regulations, and the terms of the contract executed between IMA, Inc. and the Office of Educational Opportunity. The IMA Inc. Board will create, implement, evaluate, and revise specific policies, procedures, and rules as deemed appropriate. Their work will be informed by input from the public school's Community Advisory Committee (CAC), and the Administrators of the Early Childhood Program. The Board of IMA, Inc. will conduct an evaluation of the school's administration-specifically with regard to fidelity to AMI principles once every three years.

The Community Advisory Committee (CAC) will be comprised of ten members including the school principal, two IMAPS founders, one teacher, one support staff member, two parents, two community members, and one IMAPS student. The primary role of the CAC will be to ensure that the day to day operations of IMAPS align to its mission and vision. Included in this will be the establishment and monitoring of goals, and supporting the school through student recruitment efforts, fundraising, building and fostering partnerships within the community, and coordinating school events. This body will also suggest policy and procedural changes to the IMA, Inc. Board, and to evaluate and report on what impact the policies have on members of the school community. Initially, the IMAPS principal and founders will recruit and appoint members to vacant CAC seats with the intention of ensuring a make-up reflective of the Madison community. Student representatives will be asked to serve a one year term. Initial appointees for school staff members, parent/guardian members, and community members, will be varied between one, two, and three year terms, in order to provide for continuity after this initial appointment, when these members will be expected to serve a three year term. The initially appointed CAC will be tasked with developing policies and procedures relating to committee terms and vacancies.

The school principal and founders will serve as the primary communication liaisons between stakeholder groups including the Office of Educational Opportunity, the IMA, Inc. Board of Directors, school staff members, and community members. The school principal will be primarily responsible for the day to day operations of the school, including, but not limited to, ensuring student and staff safety, supervision and evaluation of staff, management of the school budget, and staff development.

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

Isthmus Montessori Academy is a financially stable non-profit school community in its 6th year of operation. IMA began the 2012 academic school year with 20 students. This number nearly doubled by the end of Spring 2013. In five years, the learning community of students and staff has grown by nearly 400%. The school has a carryover budget from year to year and, without interruption, makes loan payments to continuously reduce the principal balances on amounts still owed for facility expansions previously required to accommodate increasing enrollments. Our annual operating budget is approximately \$900,000, including approximately \$850,000 in total operating expenses. IMA established a scholarship fund within its first operating year and now provides financial assistance to 40% of the families whose children are enrolled in the school.

Current IMA debt structure includes the following loans. Going forward, IMA, Inc. will assume responsibility for the retirement of all existing debt.

- Monona State Bank: Original principal amount: \$228,000; current balance: \$128,000; monthly payment: \$3,800; final payment due: August of 2021
- Private Loan from Individual: Original principal amount: \$58,000; current balance: \$8,400; monthly payment: \$840; final payment due: July of 2018

IMA, Inc. and the Isthmus Montessori Academy Public School will operate as a collective. When the public school is established, the relationship with IMA, Inc. will work together in close collaboration to

meet the needs of the community. The organizations will share facility space for service learning and for events that follow the vision and mission of the collective. Payroll will be handled separately though staff will work together to promote holistic education on the learning continuum. Though IMAPS budget will be independently tracked and managed, and is independently balanced, IMA, Inc. commits to the ongoing financial success of the public school.

9. The potential location of the school:

The school will be located at 1402 Pankratz Street or within a one mile radius of this location. This vicinity meets multiple criteria for serving the community, the children, and the overall learning model. These criteria include accessibility to the bus line and the downtown area, access to sufficient green space for outdoor environments and urban farming, and proximity to underserved neighborhoods.

10. Evidence of support from the community:

- When the Madison school district surveyed the community about priorities for its “Vision 2030” initiative, over 72% of all respondents indicated a support of the Montessori method and a desire to see access to AMI Montessori offered within a public school.
- Two change.org petitions supporting a public AMI Montessori option within Madison’s public schools received a combined 500 votes, including votes from residents of every aldermanic district in Madison.
- A Facebook page devoted to advocacy for public Montessori in general, and Isthmus Montessori Academy opening a public Montessori school in particular, has 611 supporters.
- In Isthmus Montessori’s efforts toward a partnership with the Madison school district, nearly 100 members of the public registered public testimony in support of bringing Isthmus Montessori Academy’s school to the public sector
- Madison schools Superintendent Jen Cheatham recommended approval of an IMA instrumentality charter. She spoke publically about the strength of the method and the potential for Montessori to add value to current public school offerings.

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

IMAPS First Year Operating Budget Year 1	2018-2019
Revenue Generators	
Per Student Multiplier	8,615
4K adjusted enrollment	175
Revenue Sources	
State Authority	1,507,625
Authorizer Fee	(45,228)

Fundraising	50,000
Other (allowable school fee, field trip fees, etc.)	19,103
Total Revenue	1,531,499
Expenditures	
Instructional Staff and Student Services (12.7 FTE)	892,405
Administrator and Clerical Staff (2.0 FTE)	188,442
Other Staffing Cost (PD, Training, Recruitment, CAC, Sub, temporary staffing)	13,600
Purchased Services	
Lease (see note 2)	116,699
Utilities (see note 2)	33,733
Transportation 4K-5	71,264
Other services (maintenance, repair, licensing, etc.)	10,190
Principal & Interest	
Allowance for construction loan re-payment, IMAPS portion, only. See Note 1.	50,000
Supplies	
General & Classroom Supplies (curriculum & programming, marketing & recruitment, etc.)	126,500
Meal Program– Breakfast, Snack, Lunch – Net Expense	
Staff, revenues, reimbursements, supplies, food, etc.	28,609
Total Expenditures	1,481,443

Note 1: Assumes 20-year term, 5-6% interest rate, \$600,000 financed amount.

Note 2: Direct IMAPS operating expenses and proportionally allocated joint IMA, Inc.-IMAPS overhead expenses.

CAPITAL IMPROVEMENT BUDGET 2018-2019	
Non-Recurring Expenditures (Construction Build-Out IMAPS & IMA, Inc.)	600,000
Capital Funding Sources (Commercial bank loan supplemented with grants and low-interest loans or grants from foundations or other sources where possible)	600,000

[illegible]

IMAPS will begin with a projected enrollment of 175 children in 4K through 9th grade, and a state authority of \$1.5 million with a balanced, operating budget.

Enrollment: Projections are based on current IMA enrollment, recruitment strategies, and past enrollment numbers and trends. Public Montessori schools in the state and nation show evidence of strong startup enrollments and thus encouragement for public Montessori in Madison. Students will be welcomed and supported by a professional, AMI-accredited teaching staff, most of whom are already in place and devoted to the IMA Montessori mission.

Staffing: IMA generally encourages teaching assistants of proven potential to consider becoming full-time teachers. To facilitate this career advancement, IMA pays for assistants' AMI Montessori training costs. IMA has sponsored several teaching assistants under this arrangement who have recently completed their AMI coursework. The plan is to assist these educators in completing any necessary licensing requirements prior to July 2018. IMA will use outside searches and hiring to fill the few remaining vacant teaching positions, projected to be 1-2 in number, as well as the vacated assistant positions prior to the end of Spring 2018.

Parent-Teacher-Child Relationships: Prior to the start of School in 2018, IMAPS employees will participate in an intense two-week orientation session that, in part, will prepare them to introduce the new school and its mission to families and children. These family meetings will be organized by classroom and scheduled over a two-week period following the start of the school year. To ensure focus, food and childcare will be provided during these meetings. This orientation process, which will involve the entire learning community, is intended to build confidence in our collective efforts to listen and learn from each other, to provide a nurturing learning environment, and to reach our goals of enrollment stability and growth. This orientation period will be followed by monthly community informational meetings and social events as well as opportunities to observe children present their work.

Financing and Fundraising: IMAPS and IMA, Inc. will work in concert to secure low and no-interest loans in addition to grants and other fundraising to account for 100% of the leasehold improvements. IMAPS will establish the Community Advisory Committee within 30 days of the signed contract with the UW OEO. One of the CAC's first tasks will be to develop relationships with potential funders and establish a capital campaign to reach 30% repayment of the build out construction loan by August 31, 2018 with continued pacing throughout the 2018/2019 school year to complete 100% funding for construction costs and retirement of the loan by August 2020.

Wrap-Around Services and Summer Programming: The school will be supported with consistent care through wrap-around and summer programming services provided by IMA, Inc. These services will also provide partial funding for facility use and maintenance.

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

IMAPS will subcontract for transportation services and make these services available to interested families. In the early years of operation before the school farm and culinary arts curriculum are fully

developed, the school may also sub-contract for food services if a suitable candidate cannot be found to serve in this role as part of the school staff.

IMA Inc. will remain the sole provider of onsite childcare services for students younger than school age and for school-age children needing before- and after-school care. As accounted for in our budget, contracted service for lawn care, snow removal, waste hauling, and occasional building maintenance services will be required. At no time will curricular development or instruction be subcontracted to any party.



Prospectus Rubric

School/Organization	Isthmus Montessori Academy (Melissa Droessler)
Reviewer Name	Gary Bennett, Director OEO

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

A. Mission & Purpose: Is the mission/purpose of the school clearly stated?	
X	Mission/purpose is clear, focused, compelling and likely to produce high-quality educational outcomes.
	Mission/purpose is likely to produce high-quality educational outcomes.
	Mission/purpose expresses clear guiding principles.
	Mission/purpose is evident throughout prospectus.
	Mission/purpose is ambiguous, vague, or otherwise not compelling.
	Mission/purpose are absent from application. (Dispositive of application. No need to proceed to subsequent sections for review.)
Comments	During a Phase 2 application, IMA should provide clarifying information related to any pending or future plans for AMI school recognition status as a part of the school's mission and daily operations.
B. Does the mission/purpose reflect the objectives of the Office of Educational Opportunity? (Multiple may apply.)	
	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	
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C. Does the prospectus include a school design that is complete and well thought out?	
General Comments	Yes.

<p>Yes or No & Provide Comments</p> <p>Yes</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>Yes</p> <p>Comments: As the Prospectus indicates, several private Montessori schools exist in the greater Madison area.</p> <p>The existence of these schools is not dispositive in the negative for IMA for three compelling reasons: elimination of financial barriers; elimination of selective admissions; and the incorporation of special education protections for students with special needs.</p> <ol style="list-style-type: none"> 1. <u>Elimination of financial barriers:</u> If approved, IMA would eliminate financial barriers to the Montessori method of education as students who opt-into a school authorized by OEO may not be charged tuition. 2. <u>Elimination of selective admissions:</u> If approved, IMA would eliminate selective admissions processes that prevent universal access to education because students who opt-into a school authorized by OEO must be admitted in accordance with Wisconsin charter school law. 3. <u>Special Education Protection:</u> Generally, Students who opt-into a private Montessori school waive their state and federal protections. Any public charter school authorized by OEO is subject to state and federal special education laws.
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D. Does the prospectus have a clear curricular focus? (Both may apply)	
X	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.
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:	
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.
X	Methodology supported by research or best practices.
X	Proposal includes evidence of support of the model from professional educators.
X	Proposal includes evidence of support from students / families interested in the school.
Comments:	
F. Does the prospectus include a governance structure that is adequate to carry out the proposed mission? Is family/community and educator participation sufficiently described? (Multiple areas may apply.)	
Partially true, but see comments.	Proposed board members include a wide range of expertise, e.g. education stakeholders, management, financial planning/management, law, and community outreach.
	Clear description of transition from planning team to operating team is included.
X	Plan includes meaningful involvement of families/community in governance of the school.
X	Plan includes meaningful involvement of educators in governance of the school.

Comments:	<p>OEO requests IMA provide guidance from AMI on Governing Board models, particularly those used by Montessori charters currently operating in Wisconsin and similarly regulated states.</p> <p>Information regarding transition plans will be requested in Phase 2 technical assistance guidance.</p>
G. Does the prospectus include evidence the organization has the financial capability to plan, develop, and operate the school? (Multiple may apply)	
x	<p>The prospectus includes evidence there is an adequate and reasonable plan to manage startup costs without complete dependence on federal or private funds.</p> <p>There is a plan for raising funds needed beyond 2(x) per pupil funds.</p>
X	<p>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.</p> <p>Financial concerns exist and are described below.</p>
Comments:	<p>Additional information about human resources expenses, gap financing for transportation, and FFE costs will be requested during the Phase 2 process.</p>
H. Is the business plan well thought out and likely to lead to a successful initiation of the school?	
Comments:	<p>Yes.</p>
I. Prospectus's strengths	

Comments:	<p>IMA's school leaders and stakeholders demonstrate a clear commitment to expanding educational equity by providing students, families, and educators with access to public Montessori and IB high school options. This expansion of public school options aligns with OEO's core mission.</p>
J. Areas of concern / need improvement	
Comments:	<ol style="list-style-type: none"> 1. Scale up planning: additional detail on the IB proposal will be requested during phase 2. 2. AMI Recognition: A cursory review of AMI recognized schools indicates IMA is not currently identified by the organization. Information on IMA's plans for recognition will be requested during Phase 2. 3. Special Education Planning: Detailed discussion about plans to comply with state and federal education protections will be requested during Phase 2.
K. Do you recommend the school/organization proceed to Phase 2? (Yes or no)	
<p>Yes</p>	



Charter School Application and Proposal

Isthmus Montessori Academy Public (IMAP)

December 8, 2017

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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)

Madison's first public 4K-9 Montessori School will be located on the north side of Madison and is opening for the 2018-2019 school year with the explicit mission to provide access to Montessori education for families and communities that have historically been economically excluded from participating. An IB high school will be added beginning in year four. It is estimated that the initial enrollment will be 184 students among six, mixed-age multi-year classrooms in addition to common areas and an outdoor environment, and will be collocated with Isthmus Montessori Academy, Inc. a 501(c)(3) organization providing for community supports, full-time childcare for children birth to three, and wrap-around care for school age children enrolled in the public school.

Access by previously excluded communities will fundamentally change the landscape of Montessori education in the Madison area. The academic success of the school's scholars will set a precedent for responding to the changes in the developmental growth of Madison students most in need, as indicated by excessive disciplinary issues, failing grades, lack of enthusiasm for learning, or whose families desire a more holistic approach to their education.

The most fundamental principle of Montessori education is that the holistic needs of the child must drive the education of the child. Rather than applying a one-size-fits-all curriculum or modifying a uniform curriculum to meet individual needs, the Montessori classroom provides for a completely customized plan of work and learning designed with and for each child's specific needs and interests. Students are grouped into three-year classes and empowered to guide their own learning, at their own pace, with all students meeting benchmarks for the cluster at the end of the three-year period.

Montessori is a method of education that engages families and communities, promotes a culture of inclusion and respect, takes a solution-focused approach to student behavior, and inspires children to love learning and reach their highest potential while contributing to their community. Decades of research and hundreds of public school districts have demonstrated the power of the Montessori method to provide a safe, fair environment of high expectations, which accelerates academic and social outcomes for students of all backgrounds and abilities.

1.00 SCHOOL DESIGN

1.01 Provide the name of the proposed charter school.

Isthmus Montessori Academy Public (IMAP)

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.

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

The school shall be created, maintained, and operated by Isthmus Montessori Academy, Inc. ("IMA, Inc."), which is a nonstock corporation created under chapter 181, Wisconsin Statutes and has obtained tax-exempt status under section 501(c)(3) of the Internal Revenue Code of 1986. IMA, Inc. has provided OEO with documentary evidence that it is a non-stock organization in good standing under the laws of the State of Wisconsin, including a copy of its By-Laws. IMA, Inc. shall remain a non-stock corporation under the laws of Wisconsin for the duration of the Charter and shall, as often as annually, upon the Chancellor's requests, provide OEO documentary evidence that confirms its good standing and its non-stock status.

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.

IMAP will enroll students from Madison, WI and the surrounding area, serving children grades 4K through 9, expanding to serve all grades 4K-12 by year four. By no later than year four, as capacity expands, knowledge spreads, the recruitment plan takes full effect, and the school becomes more integrated into the highly diverse neighborhood on Madison's north side in which the school is located, the school's demographics will align with city-wide demographics.

Classroom projection	SY 18-19	SY 19-20	SY 20-21	SY 21-22	SY 22-23
PRIMARY (3K*-5K)	2	2	3	4	4
LOWER ELEMENTARY (1-3)	2	2	2	3	3
UPPER ELEMENTARY (4-6)	1	1	2	3	3
JUNIOR HIGH (7-9)	1	1	1	2	2
HIGH SCHOOL (10-12)	0	0	0	1	1

** 3K included in enrollment and planning, but not in per-pupil funding assumptions.*

Class size projection	SY 18-19	SY 19-20	SY 20-21	SY 21-22	SY 22-23
PRIMARY (3K*-5K)	34*	34*	34*	30*	30*
LOWER ELEMENTARY (1-3)	34	34	34	34	34
UPPER ELEMENTARY (4-6)	34	34	34	34	34
JUNIOR HIGH (7-9)	34	34	34	30	30
HIGH SCHOOL (10-12)	N/A	N/A	N/A	40	45

** 3K included in enrollment and planning, but not in per-pupil funding assumptions.*

Enrollment Projections by Grade	SY 18-19	SY 19-20	SY 20-21	SY 21-22	SY 22-23
4K	24	24	34	40	40
K	24	24	34	40	40
1st	28	25	25	34	34
2nd	20	23	23	34	34
3rd	20	20	20	34	34
4th	10	12	25	34	34
5th	10	12	23	34	34
6th	14	10	20	34	34
7th	12	12	12	20	20
8th	12	12	12	20	20
9th	10	10	10	20	20
10th	N/A	N/A	N/A	20	15
11th	N/A	N/A	N/A	10	20
12th	N/A	N/A	N/A	10	10
Total Enrollment	184	184	238	384	389

1.05 State the mission and vision of the school.

IMAP's mission is to open Madison's first AMI Montessori public school and the first fully inclusive and accessible Montessori school in the area.

IMAP's vision is to expand access to Montessori prepared environments until every child who will thrive there has access to the Montessori method. By bringing this long-proven, world-renowned method of education to the children of the Madison Community, IMAP can be an agent of major change. For many families in the community, this would be the first opportunity to have access to a different method of education; for many children, this could be the first chance to discover a love of learning, and for the City of Madison, this would be a chance to invest in students who are not reaching their full potential within current public school options.

The mission and vision to serve Madison's children with the greatest need dates back to the school's founding. Without operating as a public school, IMA's ability to reach and serve the target families is limited. IMA founders opened the school as a 501(c)(3) nonprofit, located the school in the middle of a community in need, and completed all necessary requirements to be able to accept Wisconsin Shares, a public child care subsidy for low-income families. The school also engages in targeted fundraising to support expanded access. Since it has been operating as a private school, 40% of families have received some type of financial aid each year, but this does not go far enough towards the mission of inclusivity and equity. AMI Montessori methods are a century old, well-documented, well-supported, and are currently recognized as an effective tool for various US public school districts seeking to address opportunity and achievement gaps. A public Montessori school would be unique among schools in the Madison area.

While Madison is served by seven popular Montessori schools, collectively educating over 300 students, these schools are tuition-based and families must private pay, sometimes with the help of small scholarships. This is in direct contrast to the philosophical origins of Montessori education as an urban school for poor children. Isthmus Montessori Academy was born of a desire to see Montessori education implemented as a tool to serve any student who could benefit from this scientific method. Opening up this method of education to families and communities that have historically been excluded by being priced-out is exactly the type of social justice innovation that would be supported through the use of a public school charter.

1.06 State the core beliefs of the school.

The spirit of the child is our first priority. Education should strive to maximize human potential and to assist children now and later as adults. Children have constructive energy that urges them towards their own perfection. We provide an environment that nourishes this constructive energy. Through interactions with the environment, children acquire knowledge, skills, and clarity of vision to influence the direction their lives will take within society. To that end, the IMAP Community believes:

- Every child has the potential to make choices that will change the world, and that the responsibility of the community and of each child is to advocate for the opportunity to reach the greatest capacity for productivity, respect, peace and kindness.
- In creating access to the highest quality, child-centered education based on the AMI Montessori standards.
- In providing holistic family empowerment and education through learning opportunities, discussion, and collective engagement.
- Learning in the outdoor environment is equally important to learning within the walls of each indoor, prepared environment. IMAP commits to protecting and preserving each environment through sustainable practices and community involvement.
- In an intention to inclusivity and diversity as well as fostering peace for the children and the wider community.

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

For decades, an increasing research base has shown that children educated in fully-implemented AMI Montessori programs demonstrate enhanced intellectual and social capacities, benefiting from the environment that is highly enriched, student-centered, and structured to support collaboration, creativity and respect. This freedom and responsibility fosters a motivation to learn, while keeping students happy, busy and confident in their role and value within their community.

Montessori classrooms are multi-year, multi-age classrooms, designed to allow a single teacher to work with up to 34 students, all with various strengths, needs and abilities. This includes, without limitation: children who are English Language Learners (ELL) and children who have different abilities. This is the only method of education that offers 100% differentiated curriculum, allowing each child to learn each subject at exactly their own pace while developing skills in time-management, achieving learning goals by the end of the three-year cycle.

The attributes of Montessori curriculum and instruction lend themselves to fine-tuning and adjustment to align with inclusion principles and individual child needs. Social skills, leadership, and community service are all hallmarks of the program. This focus and flexibility is why study after study has shown AMI Montessori classrooms as effective tools in addressing challenges such as achievement, behavior and opportunity gaps.

Here are just a few examples from the research supporting the use of Montessori to expand educational opportunities and produce improved educational outcomes:

Example #1

In a recently published seven-year study, Montessori education at an Arizona public charter school proved to be an extremely effective tool to address the achievement gap faced by impoverished Navajo children. Moreover, the study found that the Montessori method was able to deliver education and interventions in a way that is “congruent with Navajo cultural values.” Children at the beginning of the study were an average of one year behind in both language and math concepts, but by the end of the pre/K program “virtually all” participants were performing at or above grade level in math. (Sorensen, M., Price D. (2017) Accelerating the Mathematical Development of Young Navajo Children. In: Nugent G., Kunz G., Sheridan S., Glover T., Knoche L. (eds) Rural Education Research in the United States.)

Example #2

In 2011, the Milwaukee chapter of the NAACP produced a report on the state of Milwaukee public education and, specifically, the opportunities and achievement for African American students in Milwaukee. The report concluded: "Prospects for educational achievement are brightest for Milwaukee Public School students who are enrolled in Montessori Schools."

The report drew on 2009-10 numbers:

Math Proficiency:

Black students in MPS: 39.4%

Black students in MPS Montessori: 60.2%

Science Proficiency:

Black students in MPS: 32.4%

Black students in MPS Montessori: 66.1%

Reading Proficiency:

Black students in WI: 57.6%

Black students in MPS: 50%

Black students in MPS Montessori: 69%

Latino students in MPS: 60%

Latino students in MPS Montessori: 81.3%

Language Arts Proficiency:

Black students in MPS: 34.3%

Black students in MPS Montessori: 59.3%

Social Studies Proficiency:

Black students in MPS: 47.3%

Black students in MPS Montessori: 82.2%

Example #3

Chantilly Montessori, in Charlotte, NC has 305 students who are representative of the CMS school district. According to data collected for the 2010-2011 school year, 22% are identified as economically disadvantaged; 30% of students are African American, 6% are Hispanic. The

district-wide goal for reading disparities between racial group was set at 19% or lower, but district-wide it remains at 32%. At Chantilly Montessori, this gap is less than 12%. In the district, 76% of children are performing at or above grade level overall, but at Chantilly Montessori, 89% are, and 90.9% of students perform at or above grade level in Math.

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

The public charter school will operate at the site of the ongoing nonprofit organization, Isthmus Montessori Academy, Inc. This nonprofit entity has a tri-part mission of providing a public school for children, a childcare facility for toddlers and infants, and a partner in the community. All of these functions are based at the same physical campus and all are rooted in the brain-based and human development research and educational methods approved by the Association Montessori Internationale. The three functions will from time to time overlap, but this is by design and to the benefit of the children. Because Montessori is a whole-child approach to education, families that are part of the school community are encouraged to learn more about principles that are the hallmarks of the educational method. Even outside of school time, the school serves as a resource for parents hoping to continue at home the school principles of grace and courtesy, freedom and responsibility, and positive discipline.

IMA was founded on beliefs surrounding the pure, undistilled practices of AMI-Montessori principles, helping children and their families develop a deep and responsible caring for all of the earth and the universe. Our school strives to provide a continuum of Montessori education where students are supported to learn and grow for a lifetime. We help students understand how to reduce waste and repurpose materials. Mindfully, we choose to serve our students organic milk and snacks. We also choose to reuse containers for food so that we have very little garbage at the end of the day. Through our partnership with Scotch Hill Farm, our elementary students complete service work at the farm and truly understand where their food comes from as well as how much time and effort is involved in growing it. We always consider the lives of our families and their needs as we schedule the school day and the yearly calendar.

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

AMI philosophy is rooted in serving low income, urban, and struggling student populations, and research supports AMI Montessori as an approach that achieves strong academic outcomes for these populations. Additionally, the driving force behind our desire to become a public charter is to assist in closing achievement and opportunity gaps by providing the highest quality education available to Madison's highest need student populations. To support the school's mission of increased access to AMI Montessori, an inclusivity action plan was developed. This action plan, along with additional data to be collected and input from stakeholders, will serve as the starting point for the design and implementation of the school's strategic plan.

AMI philosophy and approach to curriculum and instruction will also serve as guides in the decision making processes throughout the system spanning from the Governance Council in

establishing policy to the classroom guide designing and implementing an individual student's lesson. For example, at the Governance Council level, meeting norms will be based on the Montessori philosophy of "Grace and Courtesy" to honor the voices and unique experiences of all participants. In a Montessori classroom, ongoing Grace and Courtesy lessons provide students with the knowledge and skills needed for peaceful conflict resolution and to cultivate productive environments. If this is the expectation we have for our children, then it will be the expectation we hold for the adults making policy decisions that will impact the lives of our students, families and staff members.

At the classroom level, teachers guide students toward independence through allowing children freedom while developing personal responsibility. Similarly, decisions made at the school level will respect the freedom of teaching staff to make appropriate decisions for their classroom communities while maintaining a focus on individual staff member's personal responsibility for the success of their students.

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

The culture of IMAP will be child-centered and family-focused, cultivating the shared values of peace, sustainability, and community involvement. IMAP will be a place for families to achieve success and gain understanding as their children grow and develop their individual capabilities. Children will flourish in the prepared indoor and outdoor environments and become lifelong learners. We believe that an investment in our children is a strong investment in the future, as the children we raise become the leaders of our community.

The first and most critical component of creating and maintaining this culture is the implementation of AMI Montessori methods with high fidelity. AMI instruction utilizes modeling, direct teaching, and practice of peaceful behavior, and creative, open-minded, and kind problem solving.

Individualized learning plans for all students allow children to thrive while developing a love of learning and developing their individual capabilities. The prepared environment of the AMI classroom honors children's individual exceptionalities and cultivates curiosity, motivating students to learn and grow. Children will also learn the values of peace through IMAP' approach toward student discipline, which focus on restorative justice practices and caring for the school community.

IMAP also recognizes that a child's first and most important learning environment is the home environment. IMAP will create a welcoming family atmosphere so parents and/or primary caregivers recognize themselves as a key to their child's success, and they receive the support and tools needed to guide their child as they develop. This will be established through providing as many avenues as possible for family engagement in the school community including opportunities for family education (DEEP Meetings, Silent Journey and Discovery), encouragement of participation in Community Advisory Committee activities, home visits,

teacher office hours, daily communication logs, providing access to Transparent Classroom for families who need it, parent resource library, seeking the support of family liaisons, and invitations to educational events such as the Wisconsin Montessori Association conference, hosted in 2017 by IMA, Inc.

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

The IMAP Governance Council and administration will lead the development of the school's initial strategic plan, ensuring the participation and input of stakeholders, including but not limited to, school staff members, parents, students and community members. While there are many models available for guiding the strategic planning process, as an AMI school, IMAP has chosen to adapt the AMI Montessori "Cycle of Work and Learning" to develop its strategic plan. The outline below summarizes the process that will be used to apply this to IMAP strategic planning process.

1. Observation: *In a lesson, the Montessori teacher begins with careful and thorough observation of the child. In much the same way, the Strategic Planning Process will begin with a careful and thorough "observation" of the current state of the school community.*
 - a. Specific activities:
 - i. Collection and review of data related to our vision and mission, such as demographics that make up our student population, specifically focused on establishing a baseline of underserved populations of children and families who enroll at IMAP.
 - ii. Additional data collection will include gathering input from students, parents, staff members, and community members related to the needs of these stakeholder groups. This may include survey, interview, and observation data.
 - b. Timeline: Initial data collection will occur after enrollment is complete, when demographic data is available.
2. Creating Developmental Goals and Learning Objectives: *From observations, the AMI teacher develops a developmental goal and learning objectives for the child. In the case of the IMAP Strategic Plan, the school's vision and mission statements represent the developmental goals, and learning objectives will be developed represented by strategic goals.*
 - a. Specific activities:
 - i. Clear and concise vision and mission statements will be created.
 - ii. Specific school level goals designed as steps to attain the IMAP mission and vision including inclusivity targets (student population demographics), academic achievement, access to educational and extracurricular opportunities.
 - b. Timeline: To be completed prior to the start of the 2018-2019 academic year

3. Action Plan: *The Montessori teacher creates an action plan to meet the unique needs of a child to assist him or her in achieving developmental goals and learning objectives. The Governance Council and School administration will similarly identify the specific actions required to meet the needs of stakeholders and achieve the school's mission, vision, and strategic goals.*
 - a. Specific activities:
 - i. Specific action steps, and timelines will be created to achieve the goals identified in the previous phase.
 - ii. Identify stakeholders who are to be Responsible, Accountable, Consulted, and Informed for specific actions/activities within the Action Plan.
 - b. Timeline: To be completed prior to the start of the 2018-2019 academic year
4. Implementation of Action Plan:
 - a. Specific activities:
 - i. Initiation of action plan steps
 - ii. Progress monitoring data collected on action plan steps and progress toward strategic goals.
 - b. Timeline: All action plan steps to be completed by the end of Academic Year 2018-2019
5. Observe, Reflect, and Adjust:
 - a. Specific activities:
 - i. Collect and synthesize any additional information (such as stakeholder input) and/or outcome data not obtained through progress monitoring.
 - ii. Review data and stakeholder input to determine whether action steps have achieved goals and anticipated outcomes.
 - iii. Determine next steps including the continuation or adjustment of action steps and goals based on data.
 - b. Timeline: To be completed after the completion of Academic Year 2018-2019 and prior to the start of the 2019-2020 Academic Year.

To ensure the IMAP Strategic Plan is created and implemented in a way that includes meaningful stakeholder involvement and maintains a focus on the school's mission and vision, the action plan will include which stakeholders are responsible, accountable, consulted, and informed for the implementation of each action step, data collection, and timeline. The Governance Council described in the following section will be the owners of the strategic planning process and will review progress four times annually.

2.00 GOVERNANCE AND LEADERSHIP

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

Isthmus Montessori Academy, Inc.; Melissa Droessler and Carrie Marlette have been involved in the development of the school since its inception in 2012. In addition to Melissa, Carrie, and the IMA, Inc., Tim Peerenboom & Fratney Miller assisted in the development of this proposal.

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.

IMA Heads of School, Melissa Droessler and Carrie Marlette have a collective 35 years teaching experience, including Melissa's tenure at the Craig Montessori School, one of ten Montessori schools that are part of the Milwaukee Public School District, at which children with backgrounds identical to some of Madison's hardest-struggling students thrive in an AMI Montessori environment.

Carrie and Melissa have worked with school communities and educators with a variety of levels of training and experience. Carrie and Melissa brought together their multiple trainings, graduate degrees, practical classroom experience, and management experience to work with the Madison community to create an accessible, AMI Montessori school. At the start of IMA, Carrie and Melissa worked with a staff of four, serving a student body of 16. After only five years, the student body has grown to 100 with a staff of 20.

Each year the school programming, financials, legal requirements and credentials, licensing requirements, materials and supplies, as well as educator training, orientation, sponsorship, and professional development are maintained, evaluated, and updated.

IMA has agreed to sponsor seven educators in receiving AMI training, and will continue this type of support program for community members each year.

Carrie and Melissa bring their unwavering passion for education into every aspect of their work with children, staff and families. They continue to create a welcoming and inspiring community for families and staff. Children have come to IMA from previous educational experiences with little confidence and have found their voice, their limitless abilities and their true selves.

Tim Peerenboom is an experienced School Psychologist and Director of Special Education. He has earned Masters Degrees in both School Psychology and Educational Leadership. He has DPI licenses as a School Psychologist, Principal, Curriculum Director, and Director of Pupil Services. Tim has experience working in rural, suburban, and urban school districts spanning geographically from Oregon to Wisconsin, to Washington D.C. and in grade levels spanning Pre-K through 12th grade. Tim's training, experience, and expertise will be leveraged to support the school's transition from a private to a public school. Specific areas in which Tim will support

include special education, section 504, English Language Learner programs, budgeting, and school policy creation/implementation.

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

Currently, the Board of Directors of IMA, Inc., a 501(c)(3) nonprofit, advises IMA in all functions of the organization. The IMA, Inc. board is guided by the goals and shared vision and mission of IMA and IMA, Inc. Upon entering into a charter contract with OEO, the IMA, Inc. Board will support IMA by overseeing implementation of the AMI Montessori method with fidelity at the school level. IMA, Inc. will review and approve policies set forth by a Governance Council, in order to ensure such policies adhere to AMI principles and support the mission, vision, and core beliefs of the school.

The Governance Council will be comprised of nine members including the school principal, two IMA founders, one staff member, two parents, two community members, and one IMA student. With the exception of the two school founders and the principal, Governance Council members will be elected by parents and school staff members. This structure complies with state law requiring that a majority of the board cannot be made up of staff members of the school. Informed by a Community Advisory Council, the Governance Council will govern the public school in accordance with applicable local, state, and federal laws and regulations, and the terms of the contract executed between IMA, Inc. and the Office of Educational Opportunity. The Community Advisory Council will be a volunteer organization comprised of parents, community members, and students who wish to support the IMA community through encouraging relationships between students, families, the school, and the community.

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

Immediately upon approval of the school's charter, the IMA principal and founders will recruit and appoint members to a school planning committee. The principal and founders will serve as co-chairs of this committee. The balance of the committee will be filled with the intention of ensuring a composition reflective of the diversity within the Madison community. One of the first tasks of the planning committee will be developing and implementing procedures to facilitate the election of Governance Council members in a democratic manner.

The planning committee will work within the following guidelines/parameters:

- Seats to be filled include:
 - Staff Seat 1
 - Parent Seat 1
 - Parent Seat 2
 - Community Member Seat 1
 - Community Member Seat 2
 - Student Seat

- Elections are to be scheduled as soon after enrollment as possible while ensuring informed participation of parents and staff in the process.
- Student Seat will be a 1 year term. Parent Seat 2 and Community Member Seat 2 will be elected to 2 year terms. Staff Seat 1, Parent Seat 1, and Community Member Seat 1 will be elected to 3 year terms. This will ensure a balance between healthy turn-over of school leadership and continuity of the Governance Council's culture and climate.
- All parents of IMAP students and any IMAP staff member are eligible to vote in Governance Council elections. Students will elect their own representative.
- The board of directors of IMA, Inc. will be responsible for the certification of election results.

The planning committee will need to determine:

- The nomination and/or volunteer process for open seats
- If more nominations are made than there are seats available, the election process including balloting, candidate forums/campaigning, and the date or dates of election.
- Processes for the creation, collection, confidentiality, and counting of ballots

Following the initial election, the Governance Council will establish policies, to be approved by IMA, Inc. that will govern how future vacancies are filled.

2.05 State the general duties of board members.

The Board of IMA, Inc. will evaluate the school's administrators, and policies and procedures specifically with regard to fidelity to AMI principles.

The primary role of the Governance Council will be to ensure that the school's functioning aligns to its mission, vision, and core values; and that the school complies with all state, local, and federal legal obligations. To fulfill this role, the Governance Council will be responsible for the establishment and monitoring of the strategic plan, developing and monitoring the annual budget, and the creation and revision of school policy. When the Governance Council develops policy and/or makes procedural changes, policies will be submitted to the IMA, Inc. Board to make final approval based on fidelity to AMI principles. Additionally, the Governance Council supports and promotes the school through involvement and guidance in student recruitment efforts, fundraising, fostering partnerships within the community, and coordinating school events.

The primary role of the CAC will be to advise the governance council on the needs of parents, students and community. Additionally, the CAC will be tasked with the coordination of school activities such as fundraising, establishing and fostering partnerships with the community and community organizations, school promotions and marketing as well as other activities to support students, families, and staff members.

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

The core values of AMI Montessori and the IMAP governance structure embody democratic management by their very nature. As can be seen in the attached organization chart, parents and staff members have multiple, clearly delineated paths to provide input and be involved in decision making. Furthermore, the IMAP governance structure is designed so that policies are established by the governance council, comprised of school staff members, parents and students. The role of IMA, Inc. in this structure is to ensure policies created by the Governance Council adhere to AMI principles and reflect the mission, vision, and core values of the school. This ground up approach to leadership truly embodies the values of democratic leadership.

True democratic management also requires the provision of autonomy to those who are part of the organization. The AMI principles of Freedom and Responsibility will be practiced by school leaders (governance council, principal, mentor teachers, heads of school) in their work with and on behalf of school staff, families, and students. That is, in the AMI model of staff training, development, and mentorship, classroom guides are provided increased autonomy to practice within the AMI model as increased responsibility is demonstrated through student success within that guide's classroom.

Another key area in which democratic management principles and parental involvement will be evident is in IMAP approach to student discipline (described in detail in section 8.04 of this document). Key to a successful AMI Montessori community is a cooperative effort between children, teachers, and families in all aspects of the child's development and education. When addressing behavioral challenges (deviations from normalcy/healthy development) that a student may experience, administration and staff work collaboratively with parents to solve problems and develop the skills needed and remove barriers for that child to act with Grace and Courtesy.

The cornerstone of IMAP approach to democratic management will be evident through the composition and work of the Governance Council. The membership of the council will be comprised of parents, staff members, community members and students. Applying the AMI principle of Grace and Courtesy to the activities and meetings of the council will ensure that voices are heard and opinions are valued. To that end, Governance Council decisions will be made through consensus rather than majority-rule votes. This will allow for council members to truly participate in decision making that is focused on creative problem-solving to the benefit of students without the restrictions inherent in majority-rules decision making.

This approach to governance is unique in comparison to the operations of a typical school board. However, the process resembles another process within the realm of public education. IEP team decision making is based on consensus building. This allows teams to focus on the individual needs of the child and to be mindful and creative in making and implementing a plan to meet those needs. In the rare instances in which a team cannot come to consensus, the LEA Representative of the IEP team is required to make final decisions.

Similar to the IEP team process, final decisions will be made by the Council President in cases when the Governance Council is unable to reach consensus. The Council President will be elected by members of the Governance Council to serve a one year term. As with decisions that are reached through consensus, final approval of decisions made by the council president will be approved by the IMA, Inc. Board. These processes will be established through policy and put into place to ensure efficiency in the Governance Council's responsibilities in moving the school toward attaining its mission and vision.

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

Guided by the mission, vision and core values of IMA, the Governance Council will draw from existing resources such as the current practices and procedures of IMA, the IMA Handbook, the Wisconsin Association of School Boards, and policy examples from existing public and charter schools to guide the initial development of IMA Policy. As described above, policies will be created and established by the Governance Council through consensus building. Policies established by the board will then be submitted to the IMA, Inc. Board of Directors for final approval.

Given this structure, the staff will have a voice in the governance of the school through having an elected representative on the Governance Council. This also provides a natural liaison between the governing body of the school and school staff. This highly collaborative system allows staff to work closely with the Governance Board in developing and executing the strategic plan.

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

See Appendix A

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

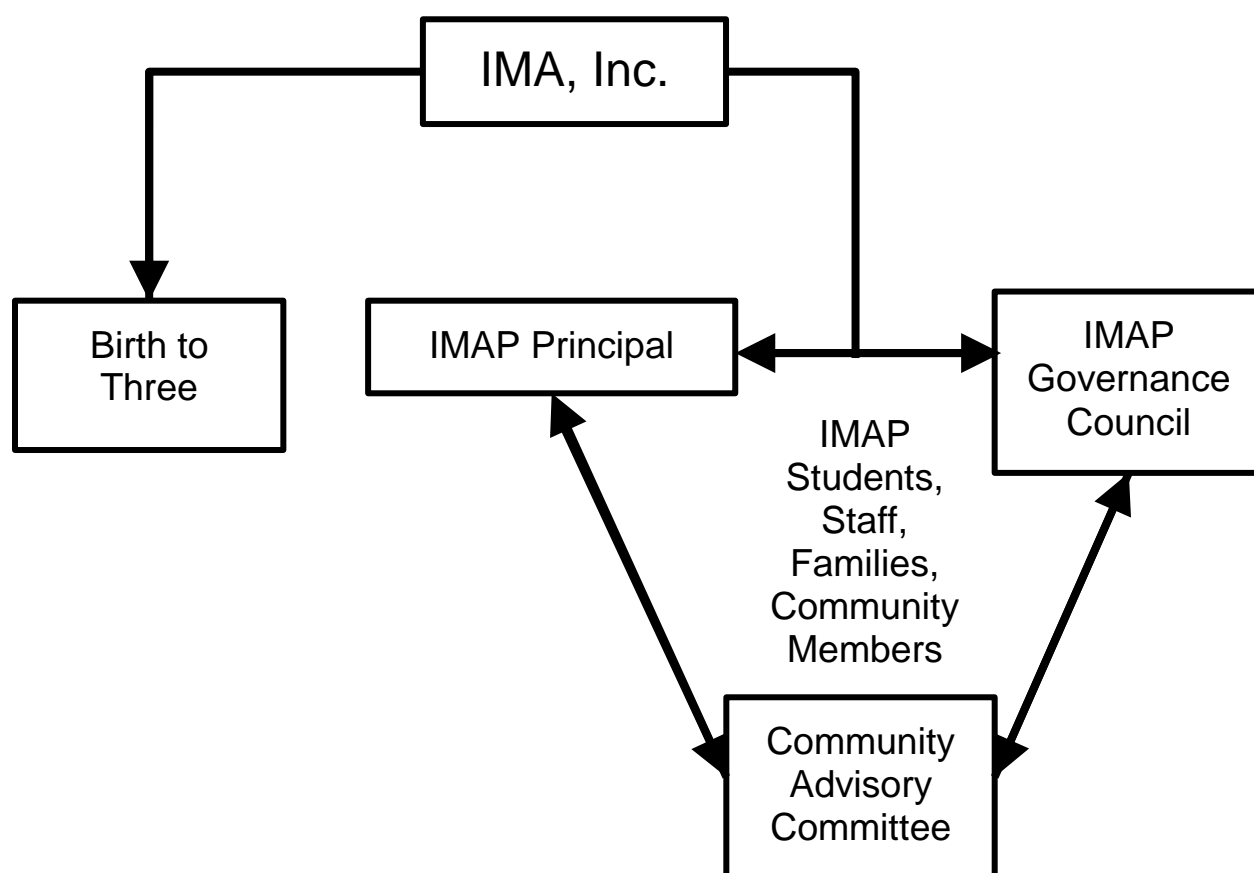
See Appendix B

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

The planning committee will be chaired by the school principal, and two founders, Melissa Droessler and Carrie Marlette. Names and occupations of the initial Governance Council will be submitted to OEO after the planning committee has facilitated the election process.

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

The board of IMA, Inc. will oversee the broad functions of the school through the evaluation of IMAP administrators, financial management, and the review and final approval of school policy. The Governance Council will have authority and responsibility for organizational planning (mission, vision, strategic plan), monitoring school progress toward organizational goals, ensuring the legal and ethical integrity of the organization through the development and adoption of policy. School administrators will be responsible for the hiring, supervision and evaluation of staff members, ensuring safe, efficient, and effective day to day operations, staff professional development, curriculum and instruction, student services, special education and Section 504 programming.



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 school principal, with the support of the administrative assistant, will be responsible for managing school operations. This includes, but is not limited to, human resources management, payroll, budgeting and finances, record keeping, and facilities management. The school principal will hold a minimum of a master's degree and the appropriate DPI

administrative license as school principal. Please refer to the budget for specific allocations for school administrative services and clerical support.

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

The IMAP principal shall have Wisconsin DPI certification as a principal and professional experience as a school administrator. As this position will be directly supervised by the IMA, Inc. Board, experience as a district level administrator is preferred. Experience at an AMI Montessori school and AMI Montessori training at the Primary and/or Elementary level, or a willingness to obtain such training prior to the beginning of the school year is required. A careful review of the country's public Montessori landscape reveals that the most successful schools are those whose leaders are thoroughly steeped in the AMI methodology, and have seen cohorts of students pass through multiple three-year age groupings. In order to lead the school toward successful achievement of the IMAP mission and vision, candidates with experience at a Charter School and professional experience working with diverse student and family populations will be encouraged to apply. As with our instructional staff, educational leaders with multiple licenses and a wide range of professional experiences are preferred.

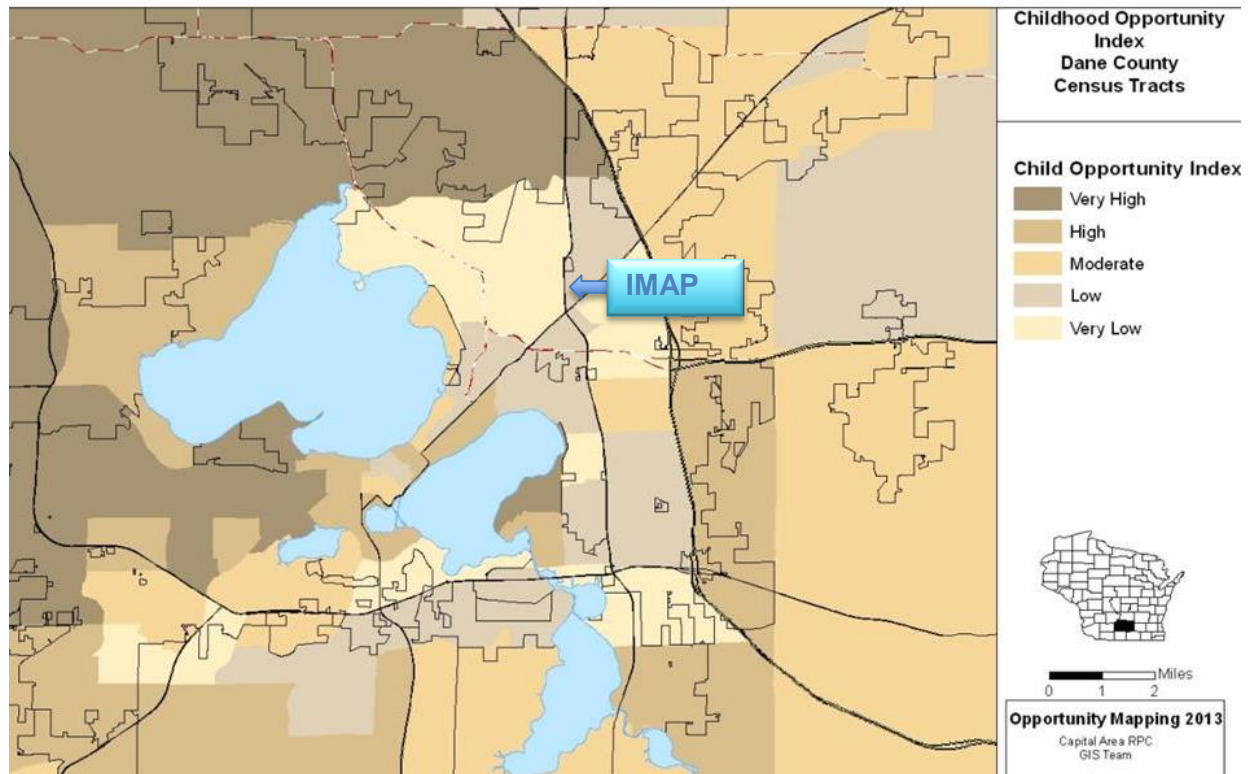
2.14 If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation.

Not Applicable

3.00 COMMUNITY AND FAMILY ENGAGEMENT

3.01 Describe the community the school will serve.

IMAP intends to serve children in the Madison, WI community who could benefit from the research-based method of AMI Montessori education. Madison is an ethnically, racially, and socioeconomically diverse community. The school's current location is in the immediate vicinity of several low-income housing providers, serving populations including African American communities, Latino and undocumented communities, and refugee communities from Thailand, Vietnam, and Laos. According to the most recent Department of Public Instruction Report Card, the Madison Metropolitan School District student population is 17.8% African American, 8.9% Multi-Racial, 21.2% Hispanic/Latino, 18.6% Limited English Proficient, 14.3% Students with Disabilities, and 46.2% Economically Disadvantaged. The location of IMAP was intentionally chosen in order to be easily accessible to disadvantaged populations who experience opportunity gaps (see map on following page).



While many children can benefit from instruction that focuses on Independence, Freedom and Responsibility, and Grace and Courtesy, AMI Montessori instruction can be of particular benefit for underserved populations of children. IMAP goal is to provide new educational and extracurricular opportunities for traditionally underserved populations including English Language Learners, Students of Color, and Students with Disabilities. According to the most recent District Report Card from the Wisconsin Department of Public Instruction, many public school students in the Madison community within these demographics are not thriving academically. The table below shows the percentage of students who performed at the Proficient or Advanced levels in Language Arts and Math.

Group	% Proficient or Advanced in English Language Arts	% Proficient or Advanced in Mathematics
African American	11.1%	8.9%
Hispanic/Latino	18.4%	16.8%
Limited English Proficient	18.1%	18.3%
Students with Disabilities	11.3%	11.2%
Economically Disadvantaged	15.5%	14.4%

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

This school is developed at the request of the community. Parents seeking affordable, high-quality Montessori approached the organization founder in 2011, asking them to create an accessible option for Montessori education in Madison.

IMA's founders approached the local school district about the possibility of creating a neighborhood school rooted in the AMI Montessori method. As a proof of concept, they opened a small private school in 2012, supported and guided by a core group of dedicated families. These families were joined by others, and by neighbors, business representatives, and educational experts in pursuing a path to public Montessori in the district.

As the concept became better developed, IMA began doing more specific outreach to members and leaders of communities that are underrepresented in current Montessori schools, or who are underserved in the public schools available. These conversations and collaborations led to the development of the organization's Inclusivity Action Plan.

There is ample evidence of continued community-wide support for this advance in Madison's education landscape:

- When the Madison school district surveyed the community about priorities for its "Vision 2030" initiative, over 72% of all respondents indicated a support of the Montessori method and a desire to see access to AMI Montessori offered within a public school.
- Two change.org petitions supporting a public AMI Montessori option within Madison's public schools received a combined 500 votes, including votes from residents of every aldermanic district in Madison.
- A Facebook page devoted to advocacy for public Montessori in general, and Isthmus Montessori Academy opening a public Montessori school in particular, has 611 supporters.
- In Isthmus Montessori Academy's efforts toward a partnership with the Madison school district, nearly 100 members of the public registered public testimony in support of bringing Isthmus Montessori Academy's school to the public sector.
- Madison schools Superintendent, Jen Cheatham, recommended approval of an IMA instrumentality charter to the MMSD Board of Education. She spoke publicly about the strength of the method, the capacity for IMA, Inc.'s leadership to successfully operate a public school, and the potential for Montessori to add value to current public school offerings.

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

Under the school's Inclusivity Action Plan, IMA intends that all attending families feel welcome and empowered to play an active and productive role in the learning community. IMA recognizes that a school community is strongest when students' families are full participants in the community and further recognizes that many children in the Madison area have family

members with less-than-fond memories of their own educational experiences. IMAP is committed to outreach and support for all families in the goal that they might grow to see school as a source of freedom for intellectual curiosity, and not as a source of trauma. All employees from support staff to administrators commit to a goal of engaging with parents and community members/organizations in authentic and mutually supportive ways, asking families rather than telling them how the school might adapt to serve their needs, fostering a school environment that is comfortable and enjoyable for families. Progress toward these goals is measured by the Governance Council through informal feedback such as parent-staff conversations, formal communications via the Community Advisory Committee, an annual customer satisfaction survey, and by measuring family participation rates at school and community events.

AMI Montessori is a 'whole-child' method of education and families are a crucial component of that approach. The only absolute requirement to which families are held is that they express an actual preference for their children to be educated in the Montessori Method. As a charter school, IMAP would be a school of choice. Participation would always be voluntary, and so in making the choice to enroll their children, IMAP asks families to consider their decision. In order to facilitate parent understanding and participation, IMA has always been committed to reaching families where they are comfortable and in whatever ways they are able. IMAP will continue this commitment and engage with families through the methods families prefer or require: email or phone calls, school visits or home visits, or through any of the primary family engagement channels described below.

Family Liaisons: Two parent volunteers each year serve as family liaisons. Liaisons are available to discuss or problem-solve around any needs that could be supported within the school community (meal trains, carpools, hand-me-downs, etc.). These liaisons also provide a confidential venue for relaying questions or feedback to the administration. Liaisons will be coordinated through the Community Advisory Committee and will work with the administration and Governance Council to honor the voices, address the needs, and represent the interests of all families in the school community.

Annual All-Parent Orientations: The beginning of the school year offers several meetings at various times for families to meet other families, hear an overview of the curriculum and instruction, and ask any questions they may have about the school. All parents that are able are strongly encouraged to attend. Families entering after the start of the academic year are provided with several options to receive this information (office hours, home visits or off-campus meetings, phone, emails, etc).

DEEP Meetings: Eight free, public seminars held throughout the year provide a forum for discussion, exploration, and education for people ("DEEP") about Montessori methods and about tools that families can use outside of school to help empower children to meet their personal and academic potential. They also provide a venue for families to ask questions and share experiences about child development, the home environment and the family's role in the school community. These meetings are advertised to families of attending children, families of other public or private school students, interested community members and education

professionals. Past topics include positive discipline, addressing transitions, talking about race, and more.

Community Action Committee: As described in section 2.05 of this document, the CAC is a volunteer committee open to any parent or community member who wishes to support the school and advocate for children. Regular monthly meetings will be advertised and held for parents and community members to voice concerns and share ideas about how the school could be improved. The CAC will be the most formal and direct line of communication with the Governance Council and school administrator.

Removing Barriers to Family Participation: Most community, family and social events are held at the school, which is ADA compliant, accessible by public transit and with free parking. For evening meetings, childcare is provided, which includes a meal, and refreshments offered to attendees. IMA is committed to using translation or interpretation resources to meet any additional language needs of interested families. For families with unique scheduling or mobility needs, the administration remains committed to finding creative solutions for engagement, including honoring family requests for conferences before or after school hours, and at libraries, coffee houses, or in a student's place of residence. These alternate venues and arrangements can also be utilized by any parent wanting an opportunity to discuss their child's progress and academic career plan outside of the baseline framework of biannual conferences and quarterly progress reports.

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

IMA values its developing and continuing partnerships with multiple community organizations. IMA works in partnership with GSAFE to create further learning opportunities and genuine service work with the intention of increasing leadership opportunities for LGBTQ youth and youth of color as well as continuing to strive for greater racial, gender, and trans social justice. IMA continues to deepen relationships with neighborhood community organizations. IMA has partnered with East Madison Community Center and Performing Ourselves for an extracurricular movement program for elementary aged students. The theme of their work and eventual performance was 'Connections and Collaboration'.

Community engagement, micro-entrepreneurship and environmental responsibility are all components of an AMI Adolescent Program. In furtherance of these goals of preparing adolescents for leadership in their communities and careers, new partnerships were established in 2016 that provide adolescents with skills, knowledge, and opportunities for service. The teens themselves will help shape the partnership relationship with these entities including Community Groundworks, Wisconsin School of Music Association, Wild Rumpus Circus, the Chazen Museum of Art, and the Central Library's Bubbler Room.

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

Isthmus Montessori Academy participates in the Overture Center for the Arts' International Festival, Madison's Juneteenth Festival, MMSD's Early Childhood Resource Fair, the Natural Parenting Expo and sponsored a Family Fun Night at the Warner Park Community Recreation Center, which was attended by over 200 residents of the Northside Neighborhoods. This year, IMA has welcomed musicians and dancers to use school space to provide lessons for students after the school day is finished.

A local grassroots organization, Black Girls are Magic, has contracted to use IMA's facility as a venue for an event focused on networking, leadership and celebration of black women and girls in Madison. IMA, Inc. has also arranged to provide a venue and other supports to a coalition of Madison mothers of color for a discussion series focusing on parenting and wellness topics. The elementary students of IMA joined school-age members of the East Side Community Center in an IMA-sponsored movement workshop series facilitated by Performing Ourselves. While IMA, Inc.'s relationship with these organizations is rooted in a commitment to community support, it is anticipated that by bringing parents and children into our space we will broaden awareness and demand for the school among those communities.

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

The IMAP handbook will be drafted and maintained by school administrators based on the policies and procedures developed by the Governance Council. The handbook will be provided annually to families and will also be available on the school's website. The IMAP handbook will specify the requirements and expectations of students, families, and staff members. This includes, but is not limited to student behavioral expectations and responsibilities, parent expectations for day to day procedures such as calling in student absences, drop-off and pick-up procedures, and other information that ensures clear expectations and efficient day to day operations.

Preferences of students, parents, and other stakeholders are taken into consideration through multiple channels of communication. Students and parents will hold positions on the School Governance Council. Parents, students, and community members are also able to share information through the Community Advisory Committee, whose role is to advocate for the needs and wants of parents and community members. Customer satisfaction surveys will be completed annually to elicit feedback from student families. Parents and stakeholders can also formally and informally communicate preferences through email or Transparent Classroom, meeting with their child's teacher or an administrator during office hours, attending parent teacher conferences, participating in DEEP Meetings, requesting or accepting a home-visit from a staff member.

4.00 MARKETING, RECRUITMENT, AND ADMISSIONS

4.01 Describe the marketing program that will be used to inform the community about the School.

IMAP is committed to providing expanded access to Montessori education, which means intentionally reconciling a history of exclusion and discrimination based in economic barriers. Out of this focus, the school has adopted an Inclusivity Action Plan and recruitment strategy to ensure access by populations represented in the immediate neighborhoods, who have not historically had access to Montessori education, including: low income students, students of color, highly-mobile students and unaccompanied minors, students from immigrant and non-English-speaking families, and justice-involved youth.

I. Advertising

IMACS will recruit through open houses, free parenting seminars (“DEEP Meetings”), informational booths at resource fairs and festivals, and through advertisements in newspapers, community organizations such as libraries and doctors offices, and social media reaching various groups of students/families. IMA currently participates as an exhibitor at the Overture Center’s International Festival, Madison’s Juneteenth Festival, MMSD’s Early Childhood Resource Fair, the Natural Parenting Expo, and sponsoring a Family Fun Night at the Warner Park Community Center. IMAP is committed to continuing these practices and exploring other opportunities to reach families whose children may benefit from an AMI Montessori education.

II. Neighborhood Campaign

IMAP will focus its recruitment through a local neighborhood campaign. IMAP administrators and supporters will build off of their existing relationships and work directly with the Northside Planning Council, Vera Court and East Madison Community Centers. IMAP will educate staff in these organizations, offer informational sessions in the neighborhood centers, and meet directly with potential families identified through those organizations. Staff and supporters are committed to a door-to-door campaign in the neighborhoods surrounding the school, talking to families directly, giving these families information about the strengths of the Montessori method and the most current information about the school, including information regarding enrollment. IMAP will encourage families identified through this neighborhood campaign to spread the word to friends and family, as word of mouth often outpaces advertisements and promotional material. IMAP truly aims to be a public school with public school children, and is committed to recruitment to this end.

III. Relationships of Trust with Targeted Communities:

IMAP will utilize the relationships of its current staff, families and allies to ensure that the diversity of membership is accomplished. IMAP supporters are leaders in the communities in which IMAP is focusing recruitment including students of color, low-income families, and students with disabilities. IMA has existing relationships with organizations sharing related missions such as 1800 Days, Women in Focus, and GSAFE. As the school develops and the Governance Council and Community Action Committee are formed, the inclusivity action plan will be further formalized. Through this, existing partnerships among members of these bodies will be leveraged to develop a network of relationships with organizations such as The UW System, Child Care Centers, local Health Care Providers, and Dane County Human Services,

among others, who will all have up to date information about the opportunities that IMAP may be able to offer their clients.

4.02 Explain how students will be recruited for the program.

IMAP will recruit through open houses, free parenting seminars (“DEEP Meetings”), informational booths at resource fairs and festivals, and through existing relationships with organizations with related missions such as 1800 Days, Women in Focus, and GSAFE, the Northside Community Center, the Eastside Community Center and through advertisements in newspapers reaching various groups of students/families. Additionally, IMAP administrators, staff members, and volunteer stakeholders will conduct various outreach activities such as advertising on social media, direct mailers, and door to door canvassing in the neighborhoods surrounding the school.

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).

Isthmus Montessori Academy has adopted an Inclusivity Action Plan and recruitment strategy to ensure access by populations that have not historically had access to Montessori education in this community, including: low income students, students of color, highly-mobile students and unaccompanied minors, students from immigrant and non-English-speaking families, and justice-involved youth.

Isthmus Montessori Academy participates as an exhibitor at the Overture Center’s International Festival, Madison’s Juneteenth Festival, MMSD’s Early Childhood Resource Fair, the Natural Parenting Expo, and recently sponsored a Family Fun Night at the Warner Park Community Recreation Center, which was attended by over 200 residents of Madison’s Northside Neighborhoods.

Rather than relying solely on direct recruitment, IMA, Inc. is committed to raising awareness among targeted populations by acting as meaningful partners in support of these communities’ own initiatives. A local grassroots organization, Black Girls are Magic, has contracted to use IMA’s facility as a venue for an event focused on networking, leadership and celebration of black women and girls in Madison. IMA, Inc. has also arranged to provide a venue and other supports to a coalition of Madison mothers of color for a discussion series focusing on parenting and wellness topics. The elementary students of IMA joined school-age members of the East Side Community Center in an IMA-sponsored movement workshop series facilitated by *Performing Ourselves*. While IMA, Inc.’s relationship with these organizations is rooted in a commitment to community support, it is anticipated that by bringing parents and children into our space we will broaden awareness and demand for the school among those communities.

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

No family will ever be obligated to enroll their student at IMAP. Application and enrollment is entirely voluntary.

Importance of continuous programming: Continuous participation throughout primary and secondary school allows children to realize the full benefits of this scientific method, though benefits will accrue to children enrolled for shorter terms, as long as a critical mass of classmates are rooted in the method.

4K - 1st Grade enrollment: Applications will be subject to an annual initial application deadline.

Admission after the start of 1st Grade: In years of expansion or to fill vacancies from departing students, older students may submit an application for enrollment provided such enrollments would not result in more children in the receiving class having more non-Montessori children than those with Montessori experience. This interest in the preservation of culture and climate may be overcome when IMAP performs a balancing test and determines that the needs of the student outweigh the risk of temporary disruption.

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

Any child whose family demonstrates an interest in the method and believes Montessori to be an educationally appropriate placement is welcome to apply for entering and back-fill seats. Applications in excess of capacity will be resolved through lottery, except for such lottery exemptions as provided by Wisconsin Statutes 118.40(3)(g)(1) through (3).

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.

IMA works directly with the Montessori Institute of Milwaukee, the Montessori Center of Minnesota, and other training centers in connecting interested candidates with the AMI Montessori training. IMAP will continue this practice.

IMA employees currently reflect the diversity of the community. IMA Inc.'s Inclusivity Action Plan specifies that children perform best when their demographics are reflected among senior and leadership staff; in recognition of this, IMA has successfully recruited, sponsored, supported and maintained a highly-qualified, diverse staff to fill these positions. IMAP is committed to hiring, recruitment, and training practices that will maintain this representation. To address barriers that often prevent individuals from underrepresented communities from pursuing education and certification as AMI Lead Teachers, IMAP will pair inclusive recruitment policies with a fine-

tuned “Grow Our Own” program, designed to develop talent and provide support in helping candidates with diverse backgrounds achieve teacher licensure.

Every person inquiring about employment with IMA – regardless of the positions sought – is advised about potential flexibility and support that the school can provide them if they would like to explore professional development towards senior or leadership roles. To support recruits and advancing staff in obtaining the necessary training and credentials to become full members of the faculty, IMA offers opportunities for flexible work scheduling, for reduced child care tuition for the candidate’s own children, and for assistance financing the necessary training. It is the goal of IMAP to develop capacity and leadership among underrepresented populations, increasing the diversity of teachers qualified to teach and to lead within the national field of Montessori education.

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

The IMAP interview provides job descriptions orally and in written form; the job description is provided again during orientation in conjunction with evaluation forms and goal-setting workshops. There is open discussion about the purpose and vision of school community, the school community as a living organism that is in constant change towards healthier, stronger, kinder, more collaborative and more peaceful people and organizations. Different options exist within the current framework and more will be developed as the community and the community’s needs change. For example, sponsorship is not only provided for beginning AMI Montessori trained educators and guides but also for master teachers looking to complete training at a different level. In this way, guides are able to swap classrooms for 3-6 years and then return to their original teaching level, if desired.

An open and ongoing conversation regarding the school’s focus on the preparation of the adult also allows each guide to find a supportive and cohesive group of colleagues with whom one can be working towards perfecting their practice of education using the AMI Montessori Method. Each guide and staff person completes regular self-evaluation. Each guide is paired with a mentor who also conducts an evaluation. The Principal and Head of School also complete an evaluation. Each evaluation is based on observation.

The evaluation process is based on the specific Montessori Framework for Teaching developed by Carrie and Melissa. The evaluation process is also based on the goals set by each individual and the job description for each staff person. Adherence to the AMI Montessori Method of Education and the IMAP code of conduct, work completion, healthy and productive communication, thorough observations, weekly assessments using the AMI Montessori Method as well as one national and state-level assessment for each child, community involvement, attrition of students, and the student/staff/family/community surveys all guide workforce practices as well as provide a clear path for professional progression.

Guides and school staff will be invited into a supportive, passionate, and energetic professional community that extends beyond the school grounds as the statewide, national, and international Montessori community is abundant and generous. The strength of this network is one of the reasons why there is lower attrition within Montessori teaching communities. It is motivating to work with others who share a passion that is encouraged and supported daily.

Educators will be compensated for their experience, degree level, and their evaluation results, professional goals and achievements.

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

Each school year begins with a comprehensive orientation for all IMA teachers and staff. Time and guidance are provided for each member of the IMA team to set individual and program level goals as well as to design a viable and productive plan for professional development and continuing education for the year. Team building, problem-solving and collaboration experiences are also part of this orientation. AMI training and refresher courses secure the foundation for implementation of the method. AMI also provides consultations on a regular basis. IMA has met the rigors for a NAC national accreditation. Inservices are presented three times a year and DEEP meetings are provided as opportunities for continuing education for staff and families. Program level meetings are held weekly; new teachers are partnered with a mentor teacher. There is a weekly check-in between the lead teacher and their assistant. Staff surveys are distributed and collected for evaluation of the school. Individual self-evaluations are completed before each of the two annual staff evaluations with the heads of school.

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

Professional development and staff recruitment as required to maintain “AMI Recognized” status (the highest level of certification offered by the Association Montessori Internationale) including:

- Full consultation with AMI once every three years.
- Staff attendance at AMI-Montessori trainings and refresher courses.
- Quarterly AMI In-service Education/Training for Teachers and Staff
- Assigning Mentor teachers to newly-trained Montessori lead teachers
- Staff attendance at the annual Wisconsin Montessori Association Conference

Ongoing formal staff meetings to monitor data, collaborate to address problems and concerns, and maintain integrity to AMI instructional practices including:

- Bi-weekly full staff meetings throughout the school year.
- Bi-weekly Montessori lead teacher meetings throughout the school year
- Weekly program-level teacher and staff team meetings

Staff and students will benefit from the varied and continuous opportunities for staff growth and learning outlined above.

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 school will recruit and retain personnel in accordance with all state law requirements regarding certification and qualifications of employees of public schools, including but not limited to, Wis. Stat. § 118.19 and Wis. Stat. § 121.02. The school shall provide to the Office of Educational Opportunity a copy of all faculty and staff certification reports filed with the Department of Public Instruction, including but not limited to the Fall Staff Report (Report No. PI-1202), showing that such personnel are licensed as required by this section or have applied for licensure from the DPI. The school shall make available to OEO upon request, all licenses, certifications, and employment contracts for personnel engaged at the school. The Charter School is not subject to requirements arising in connection with Wis. Stat. §§ 118.40(7)(a) and 118.40(7)(am), but will monitor the requirements of the local school district with an understanding that the school may draw from the same recruitment pool and compete for talent.

Recently, Melissa Droessler and Carrie Marlette worked with the Wisconsin Montessori Association and bipartisan support to write and pass Senate Bill 299. This bill allows educators who complete their AMI Montessori training to hold a state teaching license. This alternative pathway to licensure is another level to ensure that all lead teachers within the classrooms at IMAP hold a state teaching license.

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

The University of Wisconsin will be welcome to seek information from IMA and IMAP for purposes of research upon reasonable request. The University may, at its own expense, survey individuals and groups (including but not limited to, students, families, educators, board members, others involved in the governance of the Charter School, and the public) concerning the performance of the school, provided that such surveying does not materially interfere with the orderly and efficient school and organizational operations. Employment contracts with teachers will specify that they shall cooperate with such surveys. The University will also be welcome to ask the parent and/or legal guardian of pupils to participate in evaluation or research, which may include their participation in an interview or responding to a questionnaire, about the performance of the school. School administrators will in good faith encourage families to participate in such evaluation or research process, subject to their consent. Research Observers designated and appropriately vetted by the University, will also be welcome to observe the school activities, provided that the activities of such research observers shall not interfere with the orderly and efficient conduct of education and business. IMA staff will be encouraged to pursue continuing education and professional development through University

educational events and classes. UW faculty and students will be invited to attend IMAP-sponsored classes, as well as educational and social events.

IMAP students are also encouraged to use the resources of the University as they complete research and plan their Going Outs into the wider environment of the community outside of school to meet with experts and explore destinations of enrichment for their knowledge and curiosity.

6.00 CURRICULUM AND INSTRUCTION

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

Montessori classrooms are multi-year, multi-age classrooms, designed to allow a single teacher to work with more than 30 students all with various strengths, needs, and abilities including, but not limited to children who are English Language Learners and children who have different abilities.

Social skills, leadership, and community services are all hallmarks of the program. These attributes lend themselves to fine-tuning the classroom and curriculum to align with inclusion principles and individual child needs. This is why study after study has shown AMI Montessori classrooms as effective tools in addressing challenges such as achievement, behavior, and opportunity gaps.

Montessori education aligns with Common Core standards and state standards for science, mathematics, English, social studies, visual arts, theater, music, world languages, and physical education, all while meeting the objective of teaching to the whole child. In the teaching of all topics and subjects, the focus moves from personal to global, from simple to complex, from concrete to abstract, familiar to unfamiliar. Alongside academics, Montessori focuses on a child's social and personal development, and integrates fine arts, physical education, and developmentally appropriate discussions of each student's place and responsibility within their community. Instructional integration is accomplished by requiring the providers of early and afterschool care to employ Montessori principles, and by welcoming and encouraging families to learn as much about the method as they care to through various discussions, seminars, and activities.

Teachers will be responsible to meet the IMAP version of the Wisconsin Department of Public Instruction's Framework for Teachers, which includes a solid and growing knowledge of human development and brain development. This knowledge, which is considered curriculum and content knowledge provided for students as well as foundation for instructional implementation, allows teachers to deliver the curriculum and content provided in the AMI Montessori albums in the most effective ways to ensure student progress and success.

Teacher and staff development is rooted in the acquisition of knowledge and skills of human development and brain development. For example, a staff in-service for professional

development may be about music instruction which includes how the brain responds to the sensorial exploration of matching the diatonic major scale and how the brain then classifies that experience in contrast to matching and grading the pentatonic scale. This teacher development would extend to reviewing possible extensions within the older grades. Specifically, a teacher would guide an elementary class to examine the 12th century modernization of Chinese wind chimes that used the pentatonic scale. To extend this lesson for the adolescent students, the teacher could oversee metal work to create similar bells. This is just one example of how teacher development around subject matter aligns to the mission and values of IMAP; each teacher is prepared to tailor instruction to each child's developmental abilities.

Curriculum is established in the AMI Montessori written albums that meet or exceed the Common Core State Standards. The albums serve as a "base curriculum" and are amended for the individual needs of each student. Each lead AMI teacher participates in annual, monthly, weekly, and daily lesson planning which is different for each child depending on each child's individual developmental, academic, social, emotional, and physical needs. There is one lead teacher in each classroom. Same-level teachers meet weekly, and all leads meet together bi-weekly, to discuss all stages of planning and implementation of curriculum and instruction. IMAP will submit to regular evaluation from accrediting bodies such as AMI and WMA to ensure fidelity to the scientific method of education. In addition to ongoing student assessment, governance council, community, and district evaluation will be used to modify the curriculum as necessary to meet the individual developmental needs of each student.

6.02 Identify the content of the instructional program.

In the Primary (3K-5K) period of development, children absorb the culture of their group, their society, and develop intellectually, physically, socially, and emotionally. The environment is carefully organized to meet the individual needs of the child while building collaboration, concentration, coordination, independence, and improved executive function. Early learning materials are self-correcting, providing for independent exploration and learning. Later lessons are presented through instructor modeling rather than through verbal instruction, benefitting children with diverse language needs. Children further their exploration and deepen their understanding of self-care, refinement of the senses, vocabulary enrichment, encoding and decoding, letter formation, composition, geography, social studies, patterns, probability, geometry, measurement, all four operations, and more. Children choose their work and develop the abilities and habits of lifelong learning and social conduct. During a day's three-hour work period, a Primary student might begin sitting at a table tracing and writing numbers, then put on a smock and stand by the window to paint at an easel, then take a break to wash hands and help himself to a snack with a classmate, then get out a small rug and a globe and stretch out on the floor with another classmate to assemble a puzzle of North America. This freedom of movement meets the physical and developmental needs of each student.

Elementary (1st - 6th grade) students continue an active exploration of the world and their place in it. They begin a study of the universe and life on earth through zoology, botany, biology, geology, astronomy, geography, history, and the interdependence of life. They refine their understanding through practical application, use of the scientific method, research-based inquiry

of study, and continued focus on purposeful activities, developing both inner faculties and a consciousness of others in the world. Children at this level maintain daily work journals, bi-weekly work conferences, portfolio development, and regular goal setting. Repetition and assessment is naturally built into the use of the materials and small group lesson design. Children study literature, more in-depth composition, and further studies of mathematics through formula derivation using concrete materials, economic geography, science, physics, and chemistry. Another form of assessment in addition to standardized tests for elementary grades is the "Going Out." This is a milestone for each child's area of study, executing an independently planned outing to seek out experts in a particular field of study, culminating in a rubric-based, peer-reviewed presentation. At this stage of development, students develop their sense of reason and are most easily engaged by instruction that takes a narrative form. The AMI Montessori teacher may begin a Geometry lesson with a story of Euclid as a mathematician, then move onto an exploration of the iron insets, a material allowing children to independently test Euclid's theorem to prove or disprove it by manipulating shaped insets on a Pythagorean triangle. Each child pursues their independent research interest, while the guide assesses student understanding through observing and encouraging peer instruction and mentorship as they complete individual or small group work in each area of the classroom. Small group lessons are comprised of children of different ages and abilities so that all students have the opportunity to learn at their highest potential.

Adolescent (7th - 12th grade) focuses on preparation for participation in society through both theoretical knowledge and practical experience, and an understanding of personal and social responsibility. At the Adolescent Level the AMI Montessori teacher continues to guide each child on their own path towards intrinsic motivation and self-discipline as they present multiple opportunities for learning and developing one's self-esteem and self-concept. Generalist teachers are assisted by specialist teachers in subject areas including English, Mathematics, Social Studies, Arts, Science, World Languages, Music and Physical Education. Students combine academic study with practical work that shows the children their concrete contributions to the local and global community and environment. They continue to work at their own pace and interests and collaborate with their teacher to devise an Academic Career Plan that includes both cooperative and self-directed work, including microentrepreneurship. Montessori guides introduce advanced academic lessons, which are also integrated into their arts and physical education. Students may write a historical play, and design and engineer the sets or research and execute improvements and maintenance of the school farm. All adolescent students design and run their own businesses and service endeavors.

Within the Adolescent program, IMA hopes to inspire as many students as possible to embark on the curriculum of the International Baccalaureate (IB), an internationally recognized program to prepare students in junior high and high school for college and career. It is a comprehensive, demanding course of advanced study uniquely compatible with a Montessori education. IB coursework is broad and balanced, global in outlook, emphasizing the same 'learning how to learn' approach as AMI Montessori, and focuses on the development of the whole person. The IB Diploma is accepted as an indicator of college-readiness by universities worldwide.

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

The AMI Montessori method provides a plan of individualized education for every student, which is possible due to the rigorous training teachers receive in observation, assessment, and response to student needs using intervention techniques and materials from the classroom culture and environment. Throughout each day, Montessori guides use skilled observation, conferences, presentations for small group, individual, or large group lessons. Within this framework students are able to meet their educational goals.

Rather than their work being structured into “courses,” Montessori students have the freedom and responsibility to chart their own education; no two students learn exactly the same material, or access the same information in the same way and within the balance of freedom and responsibility, each student is able to achieve all academic goals in precisely the ways that are unique to the student. Each AMI Montessori classroom requires a full compendium of very specific, precisely designed materials and a very specific approach to curriculum, which is based in the science of brain development.

The Montessori guide works with an “album” that serves as a base curriculum, a selection of modules that the guide may present along with the Montessori materials in various configurations to ensure all students meet the learning goals for the cycle, while following an Academic Career Plan developed by the student and teacher together. Student progression from one three-year class to another tends to align with learning benchmarks, but is actually based on stages of psychological development. This “social promotion” keeps students with the teacher, environment, and peer group that meets their developmental needs, while scaffolding to meet academic needs. This is the only method of education that offers 100% differentiated curriculum, allowing each child to learn each subject at exactly their own pace while developing skills in time-management, achieving learning goals by the end of the three-year cycle. This freedom and responsibility fosters a motivation to learn, and keeps them happy, busy and confident in their role and value within their community.

Each day begins with the students in the outdoor environment. The children may play, participate in the run/walk club, visit and care for the school chickens, tend the gardens, socialize, or meditate. After a time outdoors, students enter the classroom environment for the work period. During each three-hour work period, students move about the classroom choosing their own work and completing lessons at their own pace, and in the order best suited to their own development. After this first work period, students eat lunch and participate in recess/physical education in the outdoor environment, and then return to the class where the youngest children nap or rest, and 5K-9 children engage in a second work period. As the students in a Montessori environment guide their own education, and because of the holistic subject matters, all portions of the day may accurately be categorized as academic instructional time.

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

As a public AMI Montessori school, IMAP will establish and achieve IMA's objective of creating access to Montessori education for families and communities who have been economically excluded. Committing to public, AMI Montessori education will advance IMA's ultimate goal of expanding access to Montessori education until such time that every child who might benefit from the method shall have the option to participate.

Through use of the Montessori method, the school will achieve the objective of accelerating outcomes for all its students through customized learning plans and systems of support that allows students, of every ability, to reach their highest potential. Montessori is a holistic approach to learning, which offers 100% differentiated curriculum, meaning that every student is challenged and each receives a well-rounded education based in each child's self-initiated exploration of the curriculum. This minimizes personal knowledge gaps between subject areas as well as knowledge and achievement gaps between children with different socioeconomic, ethnic, language, or ability backgrounds.

The Montessori method improves test scores and closes achievement gaps both by making children feel motivated to learn and by providing opportunities for children to follow their own interests and develop deep understanding of the subject matter, while also developing transferable skills. An increasing research base has for decades shown that children educated in fully implemented AMI Montessori programs demonstrate enhanced intellectual and social capacities, benefitting from the environment that is highly enriched, student-centered, and structured to support self-regulation, independence, collaboration, creativity, and respect for self and others. The intentional cultivation of community allows for students to navigate conflict resolution as well as support and sustain one another's work.

Integral to the method is a two-generation approach to education, recognizing that the family is a primary and vital source for learning. Montessori education explicitly takes an asset-based approach to differences and aims to create a positive, welcoming, safe environment that honors the individualities of students and their families

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

In more than a century of AMI Montessori Schools educating countless children across the world, there have been frequent, numerous studies exploring the various benefits of the method. Some recent research and data from the United States has specifically focused on the applicability of Montessori to the particular needs and learning gaps faced by specific struggling communities. Some examples of this are discussed in the exploration of the research underpinning the mission, vision, and beliefs, but a recently published longitudinal study specifically speaks to the impact of the AMI Montessori method on promoting the general success of students, both within and outside of school. (Franczak, Iwona. "Comparative Analysis of Behavioral Engagement and Transferable Skills in Conventional and Montessori Schools." 2016 NCUR).

This study focused on public conventional, public Montessori, and private Montessori schools. Students at both the public and private Montessori schools exhibited a greater level of engagement in terms of its intensity than did their peers in the conventional schools studied. Both public and private Montessori students also demonstrated increased capacity in the measured transferable skills of self-control, teamwork, and problem solving. (Ibid.) This increased achievement is attributed to the Montessori method creating a more positive teacher-student relationship and offering child-centered environments, both of which contribute to meeting a child's needs more effectively.

For available examples of implementation of a public charter Montessori school, the reader may refer to the following cities that are home to public charter Montessori schools. By state, these include: AK: Fairbanks, Soldotna; AR: Little Rock, Springdale; AZ: Anthem, Camp Verde, Chandler, Cottonwood, Flagstaff, Fountain Hills, Gilbert, Maricopa, Mesa, Patagonia, Phoenix, Prescott Valley, Scottsdale, Sedona, Tubac, Tucson; CA: Cameron Park, Carlsbad, Castro Valley, Chico, Dixon, El Dorado Hills, Escondido, Eureka, Fory Bragg, Grass Valley, Hayward, Lincoln, Morro Bay, Oak Run, Oakland, Petaluma, Poway, Redlands, Rocklin, San Diego, Santa Maria, Ukiah, Victorville, Vista, Walnut Creek; CO: Aurora, Boulder, Breckenridge, Brighton, Carbondale, Castle Pines, Centennial, Colorado Springs, Conifer, Cortez, Denver, Durango, Eagle, Eastlake, Golden, Littleton, Longmont, Salida, Thornton, Westminster, Wheat Ridge; CT: New Haven Washington D.C.; DE: Wilmington; FL: Greenacres Islamorada, Key West, Lakeland, Land O'Lakes, Miami, Palm Bay, Pembroke Pines, Saint Augustine, Sarasota, Tampa, Venice, West Melbourne, Winter Garden; GA: Savannah; ID: Ammon;; IL: Chicago IN: Mc Cordsville, New Albany; LA: New Orleans; MA: Haverhill, Newburyport; MD: Baltimore, Frederick, Kensington MI: Holland, Inkster, Livonia, Madison Heights, Mt. Clemens, Norton Shores, Petosky, Pinckney, Sault, Ste Marie, Shepherd, Southgate, Spring Lake, Springfield, Suttons Bay, Warren; MN: Brainerd, Chaska, Hutchinson, La Crescent, Minneapolis, Monticello, Saint Paul, Winona; MO: Saint Louis; NC: Morrisville, Pittsboro, Raleigh, Washington, Wilmington; NH: Manchester, North Conway, Plymouth NM: Albuquerque, Alcalde, Carlsbad NV: Carson, Henderson, Reno; NY: Bronx; OH: Cleveland; OR: Damascus, Eugene, Medford, Portland, Silverton; PA: Erie, Fairless Hills, Gettysburg, Philadelphia; SC: Beaufort, Mt. Pleasant, Pawleys Island; TX: Austin, Corpus Christi, Dallas, Fort Worth, Georgetown, Harlingen, Houston, McAllen, Weslaco; UT: Enoch, North Ogden, Provo, South Jordan, Washington; WI: Appleton, Barron, Cleveland, Eau Claire, La Crosse, Milwaukee, Neenah, Saint Germain, Sparta, Tomah, Viroqua, Wausau; WY: Laramie

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

Maria Montessori developed the AMI educational methods through her work with children that in the early 20th century were assigned the label of "mentally defective" (today, students with similar characteristics are recognized as students with exceptionalities or Intellectual Disabilities). The methods, curriculum, environment, and materials in an AMI Montessori classroom follow the original design, which was developed explicitly to meet the individual needs of students of all abilities. Each student is provided work that is easily adaptable and

individualized to meet his or her needs. So while the terminology may be different, various components of the AMI approach overlap with much of what is considered “best practice” for students with disabilities. Because every student in an AMI classroom has an individualized learning plan, special education services that are provided to students with disabilities may not appear obvious to observers. This is because these students are integrated fully as part of the Montessori classroom community.

The IMAP Board will establish policies to ensure compliance with all federal and state requirements as they relate to students with disabilities. Special Education programs and services will be implemented under the supervision of the school principal. This includes, but is not limited to, engaging in appropriate “child find” activities, conducting special education evaluations, and meeting the needs of students with Individual Education Plans. Students who require specialized instruction will receive that instruction from a teacher certified to provide special education services. A Special Education Teacher (or Speech-Language Pathologist, Occupational Therapist, or Physical Therapist) may work individually or with small groups of students with disabilities in the general education setting or may provide “pull out” instruction for these students as prescribed in their Individual Education Plans.

In order to meet IDEA legal requirements in its special education practices while remaining consistent with AMI standards, special education staff members who are not AMI certified will participate in professional development activities in Montessori methods and regularly consult with AMI certified lead teachers. In addition to this, in order to meet the needs of students with disabilities within the AMI Montessori Model, IMAP aims to ensure all classroom assistants are licensed and trained as Special Education Assistants. In this way, classroom assistants/SEAs are able to work with all students in the classroom while complying with all IDEA and state special education requirements.

IMAP will conduct IEP meetings for students who enroll at IMAP with existing Individualized Education Plans. The purpose of these meetings will be to gather input from the parent(s) and student to determine how the IEP supports and services will be provided in the AMI setting. The Montessori environment is naturally more adaptable than a traditional public school or classroom structure, so in many cases IEPs will not need to be adjusted for new students with disabilities who enroll at IMAP. However, there are some areas in which IMA anticipates changes to IEPs may be fairly common. For example, the “educational setting” within the IMA classroom environment will likely occur more frequently in the general education setting than most schools. Additionally, accommodations and modifications may also need to be adjusted in a child's IEP, as the Montessori classroom already provides many of the most common accommodations and modifications within the classroom for all students due to the daily routine, classroom layout and existing materials. IMA does not anticipate any scenario in which it would not be able to provide individualized services in accordance with the reasonably written IEP.

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.

Montessori takes an asset-based approach to individual and cultural differences, and teachers are trained to incorporate culturally relevant vocabulary and practices into the classroom. This principle, combined with the visual nature of a Montessori classroom and Montessori instruction which involves repetitive and academic language, and the use of peer-partnership in learning, supports English Language Learners, or other students with diverse language and communication needs. English Language Learners who attend IMAP will receive the services and supports that meet federal, state, and local requirements, and they will also receive the benefits of a program that celebrates the gifts and individuality of each student.

The Governance Council will develop policies to ensure compliance with all federal and state requirements as they relate to English Language Learners. Policies will be implemented by appropriately licensed staff under the supervision of the school principal. This includes, but is not limited to identifying students who are Limited English Proficient (LEP), conducting English Proficiency Assessments, and the implementation of appropriate programming and supports for English Language Learners.

The AMI classroom is also readily adaptable to meet the individual needs of English Language Learners. Because world languages are integrated throughout the curriculum, students are frequently able to learn in their primary language. For example, in practicing identifying parts of a sentence, a student is able to complete this work in one or both languages. Furthermore, because AMI is an international organization, materials in multiple languages are readily available.

Students identified as English Language Learners will receive the support of a licensed Bilingual Teacher inside or out of the classroom. Similar to the special education staff members at IMAP, Bilingual teaching and support staff members who are not licensed or certified AMI instructors will receive training in AMI approaches and will work closely with Lead Teachers to implement best practices in ELL instruction that are consistent with AMI philosophy.

7.00 STANDARDS, ASSESSMENT, AND ACCOUNTABILITY

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

IMAP will comply with all AMI Montessori Standards regarding teacher training and program implementation. The following is a list of minimal and basic AMI Montessori standards by which each program and classroom is evaluated:

AMI Montessori Requirements to meet Recognition Standards

1. Each classroom must have an AMI Montessori trained guide for the level at which they are teaching.
2. Each classroom may have a maximum of one non-teaching assistant.
3. Each classroom must have a full complement of Montessori materials.
4. Each classroom must have the approved number of children in the minimum range:
 - a. Primary 24-35
 - b. Elementary 24-35
5. Each classroom must have a mixed-age range of children. This would mean a balance of the following ages at each level:
 - a. Primary 3-6 years
 - b. Lower Elementary 6-9 years
 - c. Upper Elementary 9-12 years
 - d. Adolescent 12-15 years
6. Each classroom must have two, uninterrupted Montessori work periods each day as follows:
 - a. 3 hours per day every morning for all children, and 2-3 hours per day every afternoon for children 5 and up (Kindergarten and up)
 - b. It is permissible for the Elementary to reserve one afternoon a week for additional subject areas or service work.
7. Each classroom must have an AMI Consultation every 3 years. This can be done school-wide so as to save on consultation costs as we have incorporated into the budget.

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).

The method by which pupil progress in attaining the educational goals under Wis. Stat. § 118.01 will be measured as follows:

- Examinations under Wis. Stat. §§ 118.30(1r) and 121.02(1)(r) to pupils enrolled in the Charter School and shall cause the testing data for the Charter School to be transmitted to the OEO in such form as the OEO shall determine.
- The Measures of Academic Progress (MAP) testing program developed by the Northwest Evaluation Association (“NWEA”), or other assessment system approved by the OEO, and made available to the school, with the school liable for actual and direct costs borne by the University of Wisconsin System including a pro rata portion of

NWEA's startup costs charged to the University; NWEA's annual per student licensing fee based on the number of individual students assessed; a pro rata portion of NWEA's Training Workshop(s) fee(s); and any additional individualized or customized training(s) provided.

- Mastery of curriculum content, as displayed and recorded through formal and informal observation inside and outside of direct instruction time
- Student engagement as measured by observations, weekly conferences, student productivity, student presentations
- The Programme for International Student Assessment (PISA) Test.

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

The AMI Montessori method provides an individual education plan for every student, which is possible due to the rigorous training teachers receive in observation, assessment, and response to student needs using intervention techniques and materials from the classroom culture and environment. Student progression from one three-year class to another tends to align with learning benchmarks, but is actually based on stages of psychological development. This “social promotion” keeps students with the teacher (guide), environment, and peer group that meets their developmental needs, while scaffolding to meet academic needs.

The IMAP graduation requirements align with the IB Graduation requirements and will also include a presentation on human development as well as a service requirement. The requirements for the IB diploma program cover the common core state standards along with the additional requirements for IMAP graduation. Each student on the path towards High School graduation from IMAP will need to complete a thorough service plan and project along with a thorough study and completion of a course on human development. This course will culminate in a presentation at an educational event for the community hosted by IMAP. Each graduate's service work may be the result of a multi-year focus within the local community, a larger and more complex work within the school community, or it may be the result of service provided abroad.

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

AMI and WMA will perform assessment of the program through regular consultations. AMI will consult the school every three years. The result of these consultations will guide further action to improve the school decisions, implementation of the method, and content for inservices. These organizations provide external evaluation of the school's performance and confirm the daily operations as well as best practices.

Observation is the main form of assessment for each child. The observation format evaluates each child's level of concentration, work choice, repetition, work completion, and conceptual understanding. This form of observation is coded and is recorded weekly. The information provided by the observations guides the development of goals, lesson plans, and a format for reviewing results. It is the goal for the school community to respond to the individual needs of each child and inspire their spirit for lifelong learning. Observation results direct the practice of creating individualized education plans. The guides, principal, and Head of School are able to assess the observation results as positive if they are thorough and aid in the progress of individual goals being met.

Bi-weekly conferences for 1st-12th grade are another form of assessment for conceptual understanding, executive functioning skills, work completion, and work presentation. Thorough conference documentation will provide accurate focus for the guide within lesson plans and creating individual goals.

Monthly presentations of work projects and skills are used as an assessment tool for conceptual understanding, executive functioning skills, work completion, and work presentation. This is another form of assessment that the children are engaged in for self-evaluation. These are successful when completed thoroughly and also when the appropriate next steps are elicited from the children in their work.

Progress monitoring will take place with the national, statewide, and PISA exams. IMAP will review percentage gains and review the results with the staff to ensure educational success through goal setting, planning, and observation.

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

Because of the power of AMI Montessori to address achievement gaps, IMAP will measure academic success both by individual student progress and by a reduction or elimination of achievement gaps from the Year One baseline to Year Five assessments. Year Five of the charter will also be the second year the school includes an IB High School, and the success of this component would 100% of IB 12th graders graduating.

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

It is communicated with children and families that assessments are used as important and valuable tools to continue the path of learning, communicating, and self-reflection. Families are provided an assessment calendar and examples of continuous, formative assessments in the school handbook, on the website, in the school entryway. It is discussed formally at parent teacher conferences as well as during staff office hours or when requested by a parent. All families are encouraged to support their students in completing all required assessments.

Teachers communicate regularly with support staff, ELL teachers (when appropriate), student services staff (when appropriate), and families throughout a student's progress towards learning objectives and academic goals. Students from 3K-9 receive quarterly descriptive report cards, which include information on student work, assessments, weekly conferences (with elementary and secondary students), and presentation evaluations. Additionally, teachers administer state and national assessments and regular formative and summative tests throughout each year.

IMA has implemented Transparent Classroom™ as a third-party application that serves as a repository of assessment information as well as a tool for creating and distributing assessment reports on the student-, class-, and school-level. This system also provides 24/7 availability for parents to access student progress information and assessment results, including a report showing the alignment of Montessori and Common Core grade-level benchmarks.

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

Montessori-specific formative and summative assessments are embedded within the curriculum and environment, and serve as a constant and continuous guide to goal setting, instruction, and review and evaluation. A baseline assessment in a Montessori classroom reveals a student's academic, social, and physical abilities. In the course of the assessments, the AMI Montessori instructor may rely on preliminary exercises, sandpaper letters, sensorial materials, the numeration section, and Grace and Courtesy lessons. These occur at each level in different formats, and are presented in the way and order best suited to the child being assessed. As the materials used in an assessment are familiar components of the classroom environment, the act of assessment is invisible to the child being assessed, as well as to the child's classmates.

Continuous progress monitoring occurs with daily and weekly observations, questioning and learning logs, biweekly conferences (for all students at or above first grade), as well as the specific tools of a peer review process, journaling, phonogram, blend-based, and sight word spelling practice and quizzes, book group work projects, and presentation and performance review. Children participate in continuous self-assessment. Within the physical environment, children can review, based on the layout of the classroom materials, what they have mastered and what is yet to come. The children set goals and ask questions about their progress.

At the elementary and secondary levels, the children join their instructor for bi-weekly conferences to discuss their progress and participate in their own instructional planning. Summative assessments gather data on an individual child's, a particular level's, or the entire school's overall progress in multiple areas, including school climate.

Children beginning in K5 throughout High School develop annual and cumulative learning portfolios that are presented to the instructor, peer-reviewed, and then scanned and stored online through the Transparent Classroom. Class-level and school-level data from all assessment tools become part of the school's profile, and is reviewed monthly by each level, prioritizing formal observations and student work.

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

As an organization, IMAP will use an integrated system of observations, orientation, record keeping, mentor teacher support, program level meetings, all staff meetings, in-services, progress reports, and notes from both student and parent conferences to assess student progress and development. The Transparent Classroom and other forms of documentation are shared between program guides, support staff, mentor teachers and the heads of school as they plan lessons and assess how successfully each lesson is received by our students. Observation, lesson planning, record keeping and abiding assessment of each of our students will help each student to thrive and love to learn. This is an ongoing process. The integrated approach will also strengthen IMAP's organizational performance as all faculty work closely together and model collaboration for all of our community.

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.

IMAP will operate on a modified calendar with a shorter summer break with inter-sessions throughout the year immediately following reporting periods. This calendar will consist of a total of 180 school days. The length of each school day will be six hours with an additional hour lunch and exercise. Each subject area of the curriculum is taught with a balanced and integrated approach, with an average of 180 minutes of instruction per week for each subject area.

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

In addition to the Transparent Classroom system, school administrators will create an annual report for the IMA, Inc. board. This annual report will be available to the public. IMAP educators will maintain records within the Transparent Classroom system. These records may be reviewed and formulated to present to other educators and community members. Presentations may be more generally focused on the AMI Montessori Method of education while others may be about specific aspects of community organization or individual planning and growth.

8.00 EDUCATIONAL SUPPORT PROCESSES

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

The design of the AMI model of instruction has been long established. Several systems and supports will be implemented in order to ensure the consistent delivery of the AMI Montessori program with fidelity at IMAP. At the policy level the primary role of IMA, Inc. will be to ensure policies and practices align to AMI principles. At the school level, regular observations occur in

each classroom to ensure curriculum and instruction are delivered with integrity. Two formal observations per year are also conducted by an administrator for each teacher.

AMI Montessori programming includes several unique features that impact curriculum and instructional planning. Factors such as multi-age classrooms, transitions between levels based on developmental readiness rather than arbitrary calendars, and individualized educational programming for each student requires frequent collaboration amongst staff members to ensure horizontal and vertical curriculum alignment and consistent instructional practices. To that end, weekly meetings are held at the school level (staff meetings) and cohort/multi-age classroom level (program meetings). Additionally, frequent collaboration amongst staff is required to ensure successful transitions between levels for individual students.

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

The foundation of the AMI Montessori Method is to create an individualized educational program for each student using scientifically designed materials which respond to human development. At its core, the AMI Montessori Method must continuously seek new information to respond to each new child and each new phase or change that a child experiences. The method responds to the current culture rather than the comfort of the past experienced by some. High quality AMI Montessori guides are people who are passionate about continuously learning and improving themselves. AMI Montessori guides are also trained to investigate current research regarding brain development and human development so that their practice is equipped with the necessary tools.

The role of the principal and Head of School is to guide the education team with current findings and draw connections to the daily practice within each classroom community. The administration, along with the teaching staff, also share the responsibility of creating connections within the school community and the wider community for the purpose of creating relevant and responsive learning communities.

Staff training and development will be a key component of the strategic plan developed to reach the school's mission and vision. In order to support staff members in improving instructional practices, IMAP lead classroom guides are provided guidance and feedback by a mentor teacher. IMAP will offer in-service trainings four times per year and biannual evaluations of instructional staff will be conducted by senior staff. Staff members will be encouraged to participate in education conferences (such as the Wisconsin Montessori Association annual conference) and professional organizations (such as Association Montessori Internationale, International Montessori Council, North American Montessori Teachers Association).

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

The physical well-being of every student, visitor, and employee is a primary consideration in every school activity, including the designing of facilities, planning school functions, and the performance of learning tasks. Since 2012 IMA, Inc. has operated a private school and childcare center, including at the current facility, complying with all applicable laws. In the six years of operation only one incident has required report to the licensing agency. The same principles and policies that are currently in place should result in low rates of incidents for IMAP.

Several principles and approaches within AMI curriculum and instructional design serve as preventative measures that support an environment that ensures the physical well-being of all students. The culture and climate that is created under the principle of Grace and Courtesy is one that is safe both physically and psychologically. Additionally, the teaching practice of providing a “Prepared Environment” for students to learn ensures that the physical set-up of the classroom and instructional materials provide the safest possible learning environment.

In addition to the proactive health and safety measures that are part of the AMI program, a safety plan has been developed for the facility’s current functionality, and changes that will be made upon the receipt of a charter will be addressed through the development of policies by the IMAP Governance Council. Current and identified plans dictate that fire drills are held monthly, tornado drills are held monthly during tornado season, and drills for lockdown, armed intruder, and other emergency scenarios are held annually. Staff training in emergency procedures such as CPR/First Aid will also be provided. Other procedures that will be regulated through policy to be developed by the Governance Council include medication administration, documentation of injuries & health related incidents, and bullying & harassment.

The school shall ensure that all staff receive annual training on mandatory reporter obligations under Wis. Stat. § 48.981. For situations in which employees are required by the school handbook to complete an incident report or otherwise notify supervisors/administrators when they suspect a student has been neglected or abused, the policy will clearly explain the additional reporting responsibilities. Alternative reporting channels will be available in the event the misconduct involves someone in the normal reporting chain, such as an administrator.

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

The AMI Montessori curriculum and instructional methods emphasize personal freedom and personal responsibility. This focus leads to a culture of peace, respect, inclusion, and accountability, referred to as the principle of ‘Grace and Courtesy.’ Students are explicitly instructed in positive behavior, conflict resolution, consensus-building, and the importance of taking care of themselves, their environment, and each other. The AMI Montessori method is

founded upon recognizing and honoring each child's journey and story to become a productive member of the community; it is a trauma-informed educational environment, supportive and responsive of each member of that community.

Family involvement is integral to the Montessori method, and is especially important with regards to maintaining a safe, welcoming school. Families are included from the earliest onset of behavior concerns (what are referred to as deviations from normalization within Montessori), asked for input as to what might be prompting a child's actions, consulted as to the plan of addressing situations, and are provided with tools and strategies to maintain a consistent response between school and home. Whatever circumstances and responses occur at school, adult guides observe, document, communicate with children and families, and make plans for continued improvement and success.

The Montessori method includes education of all staff in the process of proactively preventing and, if necessary, de-escalating challenging behavioral situations. IMAP will provide staff and family trainings on positive discipline and nonviolent communication.

Younger children that might engage in unwelcome behaviors are redirected towards positive choices. When more advanced children with increased expectations of personal responsibility are involved in incidents that disrupt the school culture of safety and respect, the response is community-based and collaborative, consistent with restorative justice principles. In the six years that the IMA founders have run their existing school, not one student has been restrained, secluded, suspended or expelled.

IMAP core values do not support educational exclusion under any but the most urgent circumstances threatening the safety students or staff members. As one school founder states, "when a child is struggling, we do not exclude them. We bring them in closer." However, there may be circumstances when the school principal, in collaboration with a child's teacher and parent/guardian, determines that the safety of students or staff members requires the temporary removal of a child from his or her classroom.

In circumstances where a child must be removed from the classroom environment, learning and development are not suspended. IMAP is committed to ensuring continued access to services in a way that maximizes education. This remains the case during any potential absence from the child's classroom community, and also by supporting the child's healthy reentry into the learning environment. During times when a child is not participating in work within the classroom, he or she will be provided opportunities to participate in other educational activities until he or she is ready to return to the classroom community. During this time, student services staff members and/or the child's teacher will work with the child and others who may have experienced harm to ensure peaceful re-entry into the community through restorative justice practices.

Behavior Management Roles and Responsibilities

During an incident: Lead teachers of the student or students involved in the incidents implement the immediate response with the students while educational assistants maintain the integrity of the work period in the prepared environment. Support staff including the school principal, special education teacher, psychologist, nurse, school counselor, or social worker may be called in as needed to meet the needs either of students involved in an incident, or any classmates that may experience negative impacts of the incident.

After an incident: Staff that observed the incident first-hand are responsible for writing observations in the classroom log, in student files and complete incident reporting documents. Lead teachers and assistants, whether or not they were the first-hand observers assist in gathering information and conducting follow-up activities.

Tracking: Lead Teachers review all reports for their classes; Principal reviews all reports and confirms all follow-up and reporting requirements are met.

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.

The Transparent Classroom system will be used by classroom teachers to maintain student information and data such as attendance, academic achievement and growth (progress reports), state and local assessment data, immunization and health records, basic forms, parent participation in school activities (such as parent-teacher conferences, DEEP meetings, etc.), and emergency contact information.

Currently, IMA strictly follows the licensing guidelines of the Wisconsin Department of Children and Families for the handling of student records. Records are stored in locked cabinets within a locked office. Staff members who wish to review a child's file must request access and remain in the office with the record as he or she reviews it.

In transitioning to a public charter school, IMAP will follow all federal and state laws regarding the creation, access, maintenance, and disclosure of student records. Following guidelines provided by the Wisconsin Department of Public Instruction, the IMAP Governance Council will create and adopt policies to ensure compliance related to the handling of student records. In collaboration with the Governance Council, the school principal will establish and implement practices and processes to ensure the accuracy, appropriate maintenance, and confidentiality of student records.

8.06 Identify key student services and how they will be managed

IMAP will employ appropriately licensed student services professionals to ensure the physical, social, emotional, and behavioral needs of all children are met. Key student services professionals will include school counseling, school social work, school nursing, and school

psychologist. Additional student services, including occupational therapy, physical therapy and speech-language therapy will be determined by student needs identified in Individual Education Plans. Student services staff will operate under the supervision of the school principal. Student services staff members will regularly collaborate with each other, classroom staff members, parents and the school principal to ensure student needs are met.

Additionally, student services staff will be integral to supporting the mission, vision and goals of the school. Steps will be taken to ensure that the work of student services staff is completed in an efficient and effective manner. This includes, but is not limited to, documentation of collaborative problem solving processes to address health, social, emotional, behavioral, and attendance concerns at the individual student level. Additionally, student services staff will collect and analyze data at the school and classroom level in order to provide proactive supports needed to ensure all students are reaching their full potential and are able to access the full benefits of their AMI Montessori education.

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

The school principal will be responsible for overseeing the day to day operations of the school. A procedural handbook will clearly delineate the routines and practices that support a safe, healthy, and efficient learning environment. Various systems will be utilized to execute these processes in order to support student learning and maintain a system wide focus on the mission, vision, and goals of the school.

Many of the day-to-day operations are managed within the classroom by the lead teacher in an AMI Montessori setting. Lead teachers are trained in medication administration and logging, incident reporting, and coordinating Going Outs (i.e. field trips) for their students. Also, while the management of food services will be done at the school level (described in section 9.07 of this document), the serving and enjoying of lunch and healthy snacks are also coordinated at the classroom level by the lead teacher. Similarly, while custodial services will be managed at the school level by the administrative team and conducted by each class, the AMI focus on caring for the community and instruction in Practical Life as part of the curriculum encourages students, staff, and families to maintain a clean and orderly learning environment. The children in the adolescent community will take on the responsibility of the common areas while the remaining environments will be cared for by each individual classroom.

The school calendar, daily schedules, teacher prep time, duty-free lunch, staff collaboration time, staff meetings, and additional staff duties and responsibilities will be determined by the Governance Council, dictated through policies, and managed by the school principal.

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

Because every student in an AMI classroom has an individualized learning plan, special education services that are provided may not appear obvious to observers. This is because these students are integrated fully as part of the Montessori classroom community. However, IMAP will comply with all federal, state, and local requirements as they relate to students with disabilities. This includes, but is not limited to, engaging in appropriate “child find” activities, conducting special education evaluations, and meeting individual needs for students with Individual Education Plans.

Child find and evaluation practices will be conducted under the supervision of the school principal (or appropriately licensed designee), who will serve as the LEA Representative and ensure legal compliance of all special education practices and procedures. Student services and special education staff members, in collaboration with instructional staff and parents, will identify students suspected of having disabilities through regularly scheduled meetings to monitor student data and provide interventions and supports. When referrals for evaluations are made, an IEP team will conduct comprehensive special education evaluations ensuring all IDEA and Wisconsin DPI requirements are met. For students who are determined by an IEP team to have a disability and a need for special education services, an Individualized Education Plan designed to meet the child’s unique needs will be developed and implemented.

IMAP recognizes that students with disabilities may present with needs that require specialized instruction and services in addition to participating in traditional AMI Montessori curriculum, assessment and instruction in order to meet individual needs. Students who require specialized instruction will receive that instruction from a teacher certified to provide special education services. A Special Education Teacher (or related service provider such as a Speech-Language Pathologist, School Psychologist, Occupational Therapist or Physical Therapist) may work individually or with small groups of students with disabilities in the general education setting or may provide “pull out” instruction for these students.

In addition to ensuring the needs of students with disabilities are met, special education staff members will participate in professional development activities in Montessori philosophy and methods. They will also regularly consult with lead teachers to ensure special education practices at IMAP meet IDEA legal requirements while remaining consistent with AMI standards.

The majority of program financing will be provided through the annual school budget planning process based on enrollment of children with disabilities and the educational needs identified within their Individual Education Plans. Funds received through IDEA entitlement and state level special education funding will be allocated only to allowable costs that meet IDEA and state special education spending requirements. The school principal will be responsible for overseeing Wisconsin DPI and IDEA monitoring and reporting requirements.

9.00 BUSINESS AND FINANCIAL OPERATIONS

9.01 Identify the individuals and their level of expertise who were involved in developing the school's financial plan.

Carrie Marlette, Melissa Droessler, Fratney Miller, and Brandon Donkersgood, have collaborated to create the school's financial plan. In addition to managing the Olin House, the Chancellor's residence for UW Madison, for 14 years, Carrie Marlette started and managed a commercial floor scrubbing business and a vintage resale business as part-time occupations. She has worked with Melissa Droessler to create, plan, and incorporate Isthmus Montessori Academy. The process of maintaining this organization includes consistent and frequent financial planning through creating enrollment projections, organizational needs assessments, hiring and staffing frameworks, and securing funding. Melissa and Carrie have worked with Brandon Donkersgood to establish and manage a financial plan for the school throughout its lifetime. Brandon Donkersgood is a CPA and financial advisor of Legacy Investments and Insurance Services, Inc. Ms. Miller holds a Masters Degree in Public Administration, with a focus on Social Justice and Nonprofit Management, from Cornell University, as well as a J. D. from the University of Wisconsin Law School, and a ten years of experience in public program management and public program analysis, focusing on public service delivery to under-invested communities.

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.

IMA heads of school and board officers, Melissa Droessler and Carrie Marlette, IMA public school principal, Tim Peerenboom, and the IMA, Inc. board of directors will be responsible for managing the business aspects of the school.

Ms. Droessler and Ms. Marlette have their AMI-Montessori accreditation and each holds a Masters in Education. As co-founders and co-heads of school, Ms. Droessler and Ms. Marlette organized the school as a non-profit and have operated the school successfully since September of 2012.

Mr. Peerenboom has a Masters Degree in Educational Leadership and has three years of experience as a special education director for a public school district of approximately 1,500 students.

The IMA, Inc. Board consists of business people, therapy and child development experts and legal expertise.

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.

Approximately \$300,000 will be necessary for opening and operating the school prior to the distribution of federal and state funds. We anticipate a need for \$20,000 for the cost of the planning process which includes enrollment technical supplies, marketing and limited contract services fees. This projected total of \$320,000 is outlined in the cash flow statement in Appendix E. During the planning and execution of the remodel for our current school building, IMA worked with Monona State Bank to borrow funding and set up a loan to be paid off during the duration of our lease. IMA has been faithful and committed to meeting each payment of this loan on time. We feel confident in working with this financial institution to secure another loan and/ or refinancing to attain the capital required. We estimate the amount of the loan for construction to be \$600,000. IFF out of Milwaukee is another resource for the development of planning and start-up funds. IMA plans to seek additional funding through the Charter School Growth Fund as well a portion of the charter school grant funding coming through the U.S. Department of Education. IMA has operated a strong budget for nearly six years, and IMA, Inc. is prepared to be an additional support to IMA in the beginning phases of development and throughout its future growth.

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.

IMA is currently located at 1402 Pankratz Street, near the intersection of Aberg and Packers Avenues. The proposed location will be this current facility or within one mile thereof.

In order to procure a facility with adequate room for growth, IMA, Inc. and its legal and financial advisors will negotiate with the building owner, as it has for three prior locations, to develop a cost structure easily supported by enrollment levels below those projected. As stated above, the estimated construction costs to be approximately \$600,000.

IMA, Inc. will serve as leaseholder, with proportional costs allocated to the school budget. It is expected that daycare and community functions will represent approximately 20% of facility expenses annually. In no circumstance will public or private revenues of the public school be used to meet the expenses for children who are not public school students.

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 facility will be fully ADA compliant, accessible by public transit, stable and secure, with parking for families and staff, and an expansive green space for use as the school's "outdoor environment."

The school will open with six classrooms used by the school, including the two kindergarten classrooms in which 3K daycare students will receive services alongside 4K and 5K pupils. Classrooms generally consist of approximately 40 square feet per child with both carpeted space, wet space, and sinks in the room. Kindergarten classrooms will contain full child-appropriate washrooms. As many classrooms as possible should have direct access to the outdoor environment. The school facility will also include a staff break area; a conference room; a large area for special events, assemblies, or indoor recreation; a kitchen; a mixed-use space for play, learning, or service delivery; and an administrative office. These common spaces will be shared between the school, daycare, and community functions of IMA. Within the same facility will be an additional four classrooms for use in the infant and toddler program.

It is anticipated that all organizational functions will require a facility of approximately 20,000 sq.ft., with 2,500 sq.ft used exclusively by the the co-located daycare.

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

Transportation services will be made available to interested families through subcontract with a licensed commercial transportation provider, to be procured upon receipt of a signed contract with OEO. In the procurement process, IMA will seek to negotiate terms that allow transportation costs to be made available according to a needs-based sliding scale cost structure. OEO will be offered an opportunity to review and approve the selected vendor and the terms of that contract.

9.07 Describe how food services will be provided for students.

At full implementation, the school farm and culinary arts program and food services will be run by an employee of IMA, Inc., whose salary will be proportionally allocated between the school and daycare. If a suitable candidate for this position cannot be found during implementation of these former programs, food services will be contracted, with a procurement emphasis on nutrition quality, on vendors from the local community, and on female and minority-owned businesses.

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

See Appendix C

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

See additional PDF File, "IMAP Cash Flow Statement-Year 1"

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

The minimum level of enrollment required to ensure sufficient cash flow for operations is fifty (50) students. At this enrollment level, costs for facility, curriculum, and staffing would be met, and the school would occupy only one region of the intended building. To fully implement the intended school using the entire designated location, 116 students would be necessary. Because of the unique nature of the AMI Montessori classroom, these minimal enrollment levels are not dependent on any particular distribution among grade levels. Mixed age classrooms are a hallmark of the program, and classroom formation can accommodate enrollment fluctuations in early years.

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

The budget was developed to address several unique aspects of a public AMI Montessori School.

- Mixed-age classrooms. Under Wisconsin law, children become entitled to “school” when they reach the age for 4K. In an AMI Montessori program, this age group is part of a mixed-age “Primary” level, encompassing 3K-5K. This composition is necessary to the methodology, but because 118.40(2x) does not contemplate 3K, the students in this age group will be private daycare pupils under the financing and care of IMA, Inc. For this reason, 3K is counted in the overall enrollment but is not included in the IMAP funding. In turn, the IMAP funding does not support the IMA, Inc. daycare children.
- Co-located program. This school will share a common building, parking, outdoor environment, and certain mixed-use spaces with IMA, Inc. In order to be absolutely certain that no 118.40(2x) funding is used to support or supplant non-school operations, 45% of all common expense are allocated to IMA, Inc. rather than the school, despite IMA, Inc. representing only one-quarter of the children. No expenses related solely to the birth to three clients is included in the school budget.
- A Montessori classroom requires specific specialized materials. IMA, Inc. owns these materials, and the annualized costs are allocated to the school budget. These unique materials are durable, unlike consumables seen in traditional classrooms, and lasting, unlike textbooks or technology.
- Ensuring staff members receive adequate AMI Montessori training. Staff members or IMAP will be required to have AMI certification in addition to a DPI teaching license. The IMAP Budget has allocated funds to support AMI training.

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

IMA, Inc. will select a certified public accountant who will be retained to perform an audit, and will inform OEO by August 1 of each year of the auditor name and contact information. Within 120 days of the end of the each fiscal year, the school shall ensure OEO receives an audit report including audited financial statements, the auditor's management letters and any exceptions noted by the auditors, and a statement as to whether the auditor does or does not have substantial doubt as to the school's sustainability.

If the audited financial statements do not utilize the list of revenues and expenditures identified by OEO, the school will supplement this report with that information, along with a written verification from the auditor that the total revenues and total expenditures are accurately stated.

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

Isthmus Montessori Academy, Inc. has continuously worked at fundraising to support the non-profit school since 2012. The school hosts a number of fundraisers throughout the year, completes a yearly capital campaign for contributions and devotes a page of the school's website for giving in money, in service and in kind. In June of 2015, IMA, Inc. worked with Forward Community Investments to help us with remodeling expenses as we moved into our second home. Currently, IMA is pursuing funds from the Greater Good Science Center which is offering awards of between \$25,000 and \$150,000 to organizations that serve and educate parents about research-based keys that will guide their children to make choices for the long-term good of their communities. This funding period runs from April 1, 2018 through March 31, 2018. As the school has grown and the results of the Montessori Method are observed, the number of grants and endowments IMA is eligible for will also increase.

10.00 LEGAL REQUIREMENTS AND PROCEDURES

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

Isthmus Montessori Academy, Inc. recognizes that legal requirements for operating a public charter school include, but are not limited to the following laws, and any future state or federal laws or policies that may be developed:

- Title VI of the Civil Rights Act of 1964, 42 U.S.C. §§ 2000d-2000d-7;
- Title IX of the Education Amendments of 1972, 20 U.S.C. § 1681 et seq.;
- Age Discrimination Act of 1985, 42 U.S.C. § 6101 et seq.;
- Section 504 of the Rehabilitation Act of 1974, 29 U.S.C. § 794, and the Americans with Disabilities Act, 42 U.S.C. §§ 12101-12213;
- Individuals with Disabilities Education Act, 20 U.S.C. § 1400-1485 et seq.;
- Family Education and Privacy Rights Act, 20 U.S.C. § 1232(g) and Wis. Stat. §118.125 Pupil Records;

- Drug-Free Workplace Act, 41 U.S.C. § 701 et seq.;
- Asbestos Hazard Emergency Response Act, 15 U.S.C. §§ 2641-2655;
- Every Student Succeeds Act, Pub.L. 114-95;
- Wis. Stat. §48.981 Abused or Neglected Children;
- Wis. Stat. § 118.40 (2x), (4-7), which govern OEO charter schools;
- Wis. Stat. § 118.31, which prohibits corporal punishment of pupils;
- Wis. Stat. §118.32, which prohibits a strip search of a pupil;
- Wis. Stat. §115.415 Educator Effectiveness.

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

IMA Inc. By-Laws will include a Board commitment to monitoring and compliance tracking in alignment with the law. Employee orientation, the staff handbook, and ongoing education will outline legal requirements in language accessible to that audience. Staff will receive ongoing education as to the requirements dictated by applicable law, including annual refresher training, and clarifications as necessary. The Inclusivity Action Plan of the school and the Family/Community handbook will also reflect the school's commitment to compliance.

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

IMA, Inc. shall secure, at minimum, the following insurance coverage:

Commercial General Liability (including coverage for sexual abuse, corporal punishment, athletic events, and use of gymnasium equipment):

Each Occurrence Limit	\$1,000,000
Personal & Advertising	\$1,000,000
Damages to Premises	\$500,000
General Aggregate	\$2,000,000
Medical Expense	\$5,000

Auto Liability Combined Single Limit of \$1,000,000 each accident

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

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

Worker's Compensation

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

School Leader's Errors & Omissions/Educator's Legal Liability of \$2,000,000

Crime Coverage (covering Crime, and including employee theft, forgery, larceny and embezzlement for the employees, School Board members and management companies who are responsible for the financial decisions of the Charter School, including but not limited to the CEO) of \$500,000 per Loss

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.

The school will use Transparent Classroom as a client-management platform. This tool is utilized by public and private Montessori schools nationwide, and was developed by an independent third-party software company explicitly to meet the particular characteristics and needs of Montessori schools.

Not only does this software allow the school to track student progress, assessment data, demographic, health, and contact information, it also allows the school to design a secure family interface that allows families to review student work and data as well as to update enrollment information in real time.

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

IMAP families and all staff will receive a paper handbook at the beginning of each school year. The handbook will explain in detail all the rights and responsibilities for students, staff, and parents at school. IMAP believes strongly in effective communication and both setting and meeting expectations for everyone. Staff orientation includes training in setting up and maintaining student records with extra attention devoted to learning about and practicing confidentiality in communication. During orientation, the first parent meeting, parent conferences, progress reports, and teacher office hours, student records are created, used and maintained between the teacher, student and family. Forms submitted to the Transparent Classroom as well as lesson planning and student records are protected confidentially.

Appendix A

Bylaws of Isthmus Montessori Academy, Inc.

Approved by the Board of Directors on January 15, 2012

Article I

Name and Office

101. Name: The name of the educational, non-profit corporation shall be Isthmus Montessori Academy, Inc.

102. Principal Office: The principal office of the Corporation shall be located in the city of Madison, the county of Dane and the state of Wisconsin.

Article II

Composition and Election of the Board

201. Purpose and Size of the Board: The business and affairs of the corporation shall be advised by the Board of Directors consisting of no fewer than three or more than nine members.

202. Classification of Board Members: The Board shall consist of:

- (a) One to seven members who are not employees of the school
- (b) Two officers who are serving as administrators and/ or teachers as the school opens.

203. Term of Office: Board members may serve on the Board of Directors for an indefinite period of time.

204. Vacancies: In the event of vacancies or unfilled seats on the Board, the remaining members shall find and invite a new member to serve on the board.

205. Meetings:

(a) There shall be three stated meetings of the Board each school year to take place as follows:

- 1. One not more than 30 days after the opening of the school each year;
- 2. One in February; and
- 3. One not more than 30 days following the last day of the school year.

(b) Additional meetings of the board, for any purpose or purposes, shall be called by the Officers of the Board at their discretion.

(c) Notice of all meetings shall be served personally, by postal mail or by email not less than 10 days before the meeting and, if mailed, shall be directed to each Board member at his/ her address as it shall appear on the records of the school.

(d) Any action which may be taken at any stated or special meeting may be taken at a meeting of the Board without notice and without the lapse of any period of time if notice is waived in writing by every Director of the corporation.

(e) All meetings of the Board of Directors, its committees and subcommittees thereof shall be open for attendance and observation by all parents and staff of the school, except that the Directors, in open session, may, upon a motion identifying the general area or areas of the subject or subjects to be considered, and a majority vote thereof, enter into executive session to discuss the following matters.

- 1. The medical, financial, credit or employment history of a particular person or family, or matters leading to the appointment, employment, promotion, demotion, discipline, suspension, dismissal or removal of a particular person;
- 2. Financial particulars relating to negotiations of wage contracts, scholarships or leases;

3. Any other matters, the public disclosure of which would tend to imperil the privacy rights of a particular person or family.

206. Quorum: A majority of the Directors shall constitute a quorum for the transaction of all business. The vote of a majority of the Directors present at the time of the vote, if a quorum is present at such time, shall be the act of the Board of Directors.

207. Resignation:

(a) Any Director may resign at any time. Such resignation shall be in writing and shall take effect at the time specified therein and, if no time be specified, at the time of receipt by the Officers of the Board.

(b) Any Director who fails to attend three consecutive meetings of the Board shall be deemed to have resigned unless two-thirds of the Board resolves to waive this provision.

208. Qualification of Directors: Appointed Directors may include any individuals the board in its sole discretion deems appropriate for service on the Board. Qualifications for service in this capacity may include but are not limited to such attributes as comprehensive knowledge of the philosophy of Montessori education, knowledge of and familiarity with school administration, or personal ties to the school and the surrounding community.

Article III

Officers of the Corporation

301. Officers: The Officers of the corporation shall serve on the board, administrate the day to day business of the school and/ or teach in one of the classrooms.

302. Committees:

(a) The Directors, by majority vote, shall create such administrative committees from time to time as may be determined in their discretion and shall appoint Chairpersons to superintend and report upon the activities of these committees. Without limiting the generality of the foregoing, such committee may include a Tuition Aid, Finance, Legal, Publicity, Fundraising, Alumni and Development Committee, and may consist of Directors, parents, staff members and other persons.

(b) Except as provided above in Section 205.e, any parent or staff member shall be entitled to serve on any committee of his/ her desire and willingness to so serve.

Article IV

Officers of the School

401. Officers:

(a) The Officers shall be the chief operating officers of the school and shall carry out the policies established by the Board. They shall be ex officio voting members of the Board of Directors. The Officers shall have general supervision over the academic and administrative operations of the school; direct and prescribe the course of study and discipline to be observed therein; employ and, subject to the condition in this section hereafter set forth, discharge for cause all personnel, both academic and administrative, and, with the advice and consent of the Board of Directors, prescribe their duties, salaries and terms of office; prepare and submit to the Board of Directors annually a proposed budget for the next succeeding fiscal year.

402. Other Officers: The Board of Directors may provide for and select or confirm such other officers of the school as it may deem desirable and may specify their duties.

Article V

Amendments and Miscellaneous

501: Amendments to the Bylaws:

(a) Proposed amendments to the Bylaws may originate from either the parent body, the staff or from the board of directors.

1. Upon presentation to the Board of Directors of a petition signed by at least 10 percent of the combined total of family units and eligible staff members, and containing a description of the amendment or amendments sought, the Board shall schedule a special meeting of the parents and staff to be held no later than 21 days after receipt of such petition and shall duly notify all parents and staff of the time, date, location and purpose of such meeting, including in such notice the text of the proposed amendment or amendments.

2. Upon majority vote of the Board approving a motion requesting amendment to the Bylaws and describing the amendment or amendments sought, the Board shall make arrangements for a meeting of parents and staff as set forth in Article 501.a.1.

(b) The proposed amendment or amendments shall be examined and discussed at the special meeting called for this purpose. At the conclusion of such discussion, the staff and the parents present at the meeting shall elect, by majority vote, one of the principal forwarders of the proposed amendment or amendments to serve as chairperson of an Ad Hoc By-Law Amendment Committee. The purpose of such committee shall be to reexamine the amendment or amendments in light of the information and ideas gained from discussion at the meeting and to make such revisions as the committee deems desirable.

(c) Upon completion of its deliberations, the committee shall present the amendment or amendments in their final form, together with such explanatory statements as it wishes to have circulated with the text of the amendments, to the Board of Directors. The Board shall mail or cause to be mailed to all the parents and eligible staff members the text of the amendment or amendments and any additional statements.

(d) The vote on ratification of amendments to the Bylaws shall be conducted by the Board of Directors.

(e) All ratified amendments shall be effective immediately unless otherwise specified in the language of the amendment or except as provided below in Section 502.

502. Charter Amendments: A proposal to revise the Charter is to be adopted by the same procedure as outlined above in Section 501 for Bylaw amendments. Consequential amendments to these by-laws may be adopted simultaneously with such proposal but shall not be in force until notice has been given of the revision of the Charter by the Department of Financial Institutions Division of Corporate and Consumer Services of the State of Wisconsin.

Isthmus Montessori Academy admits students of any race, color, creed, religion, sex, national origin or ancestry, age, disability, sexual orientation, marital status, pregnancy, gender expression or identity, parental status, or genetic information to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, creed, religion, sex, national origin or ancestry, age, disability, sexual orientation, marital status, pregnancy, gender expression or identity, parental status, or genetic information in administration of its educational policies, scholarship programs and other school-administered programs.

Appendix B

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Articles of Incorporation Nonstock Corporation of Isthmus Montessori Academy

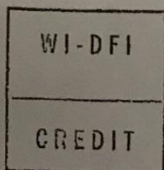
Executed by the undersigned for the purpose of forming a Wisconsin nonstock corporation under Ch. 181 of the Wisconsin Statutes, repealed and recreated by 1997 Wisconsin Act 79:

- Article 1. The name of the Corporation shall be:
Isthmus Montessori Academy, Inc.
- Article 2. The corporation is organized under Ch. 181 of the Wisconsin Statutes.
- Article 3. The corporation is to have a perpetual duration.
- Article 4. The corporation will not have members.
- Article 5. Name of the initial registered agents:
Melissa Droessler
- Article 6. Street address of the initial registered agent's office:
309 Laurel Lane
Madison, WI 53704
- Article 7. Mailing address of the initial principal office:
309 Laurel Lane
Madison, WI 53704
- Article 8. The name and address of the incorporators are:
Melissa Droessler
309 Laurel Lane
Madison, WI 53704

Carrie Marlette
7317 Southern Oak Place
Madison, WI 53719
- Article 9. The corporation is organized exclusively for educational purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

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Appendix C

REVENUE GENERATORS	2018-19	2019-20	2020-21
Per Student Multiplier	8,615	8,787	8,963
4K adjusted Enrollment	174	174	224
3K students (not funded through State Authority)	20	20	34
REVENUE SOURCES			
State Authority	1,502,456.00	1,532,505.12	2,011,307.52
Authorizer fee	(45,073.68)	(45,975.15)	(60,339.23)
Allowable School Fee (\$60 - assume waived for 15% pupils)	9,914.40	9,914.40	13,178.40
State & Federal Grants			
SAGE	-	-	-
Title I-A (*= includes T1 funding, if received)			67,341.85
IDEA (MPS per pupil avg of 1157 * 14% of students)	28,249.31	28,249.31	36,348.31
Financial support from the parent organization, IMA, Inc.	-	4,000.00	12,000.00
Fundraising and Foundation support	62,000.00	62,930.00	30,000.00
Field Trip fees (from paying students only)	8,720.00	8,720.00	11,220.00
Total Revenue	1,566,266.03	1,600,343.68	2,121,056.86

INSTRUCTIONAL EXPENDITURES						
Staffing: Full Time Equivalents	FTE		FTE		FTE	
Classroom Teacher ((incl. BRT)	5.8	454,528.02	5.8	463,618.58	8.0	652,263.38
Educational Assistant (incl. BRS)	3.0	136,122.18	3.0	138,844.62	3.0	141,621.52
Special Ed Teacher	1.8	141,060.42	1.8	143,881.63	2.9	236,445.48
Special Education Assistant	1.1	55,349.57	1.1	56,456.56	1.4	73,290.88
*Add'l SEA/BEA services for Title I-A					0.4	20,940.25
Student Services (Guidance, Psych, Social Work, Nurse)	1.5	128,032.29	1.5	130,592.94	1.8	159,845.75
*Add'l Student Services for Title I-A					0.5	44,401.60
School Administrator(s)	1.0	120,000.00	1.0	122,520.00	1.0	124,848.00
Clerical Support	1.0	68,442.03	1.0	69,810.87	1.0	71,207.09
Custodian(s)	-	-	-	-	-	-

Other Staffing Cost (Professional Development)		6,000.00		6,120.00		6,242.40
Other Staffing Cost (Recruitment & Training)				4,000.00		12,000.00
CAC (Community Advisory Committee)		1,000.00		1,020.00		1,040.40
Other (on-call, sub, temporary staffing)		6,600.00		6,732.00		6,866.64

PURCHASED SERVICES

PURCHASED SERVICES			
Services (Equipment Repair, Conferences, Mileage)	-		-
Licensing and accreditation (IB, AML)	1,440.00	1,454.40	1,468.94
Professional Services (audit, legal, insurance)	10,000.00	10,000.00	10,000.00
Lease	140,910.00	143,728.20	146,602.76
Utilities	27,830.00	28,386.60	28,954.33
Pupil Travel (research trips, field trips)	8,720.00	8,720.00	11,220.00
Construction (debt)	33,000.00	33,000.00	33,000.00
Transportation 4K-5	71,264.00	73,360.00	96,416.00

SUPPLIES

General Supplies		1,000.00		1,020.00		5,000.00
Classroom Supplies Costs		36,000.00		36,720.00		49,939.20
Curriculum and Programming (* incl T1)		87,200.00		87,200.00		112,200.00
Other (marketing and recruitment)		2,000.00		2,040.00		2,080.80

MEAL PROGRAM SUB-BUDGET

Food Service Staff	0.60	(27,609.76)	0.60	(28,161.95)	0.75	(35,906.49)
Meal revenues from paying pupils		62,784.00		69,062.40		75,968.64
NSLP Breakfast and Lunch reimbursements		125,568.00		125,568.00		161,568.00
Food Service Supplies		(1,000.00)		(1,020.00)		(1,040.40)
Food		(188,352.00)		(194,630.40)		(237,536.64)

TOTAL COST

1,565,108.27 1,598,408.35 2,084,842.31

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NET REVENUE TO EXPENDITURES

1,157.77 1,935.33 36,214.55



Phase II APPLICATION EVALUATION REVIEWERS GUIDE

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

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

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, we rely on each reviewer's summary judgment of the elements and then require a final recommendation as discussed in each section.

Please use the following statements to frame your recommendation:

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

Please consider the whole document and avoid focusing on one aspect in making a final recommendation. It is anticipated that the applicant interviews and committee discussion may impact final recommendations.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using the same rubric.
2. After reviewer comments have been completed the Selection Committee will make recommendations to the Office of Educational Opportunity Director who will compile a letter to each applicant detailing their status within the application process. In cases where additional information is required, the Director shall secure the requested information for the Selection Committee prior to a final recommendation to the Office and the UW System President.
3. When the Selection Committee makes an acceptable recommendation, the Director shall review the results and make a summary recommendation to the System President. The President shall be informed in a summary fashion about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation, the Selection Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.
7. If acceptable contract terms are reached, the Director will seek the approval of the contract from the Board of Regents.
8. No charter will be granted without the approval of the Board of Regents.



Phase II Rubric

Name of Proposed School:	Isthmus Montessori Academy Public
Proposed Location of School: (What municipality?)	1402 Pankratz Street Madison, WI 53704
Date:	1/12/18
Name and Title of Reviewer:	

Overall Assessment (complete this section last by electronically highlighting your recommendation)

- ☐ Accept for further consideration
- ☐ Deny
- ☐ Resubmit with modifications for further consideration

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

The last page provides space to make your final recommendation and provide evidence to support your recommendation.

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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

1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	



2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
-----------	--



Concerns/Questions	Is there a commitment to ensure the Board reflects the racial and ethnic make-up of the school?
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3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	Accessibility for evening meetings is strengthened by providing childcare, meals, and beverages.
Concerns/Questions	



4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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	Application practices are still unclear relative to content of the application or access. Is it a paper application and/or online? What supplemental information, if any, is necessary for the application to be complete?

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	
Concerns/Questions	Concerning recruitment: What are "inclusive recruitment policies"? Recruiting from Milwaukee and Minnesota is fine. Which local organizations or institutions will be used to recruit staff? What is the current demographic make-up of IMA? Compensation language is too vague and provides no clear understanding of ranges of salaries or even comparisons to district salaries or otherwise.



6. Curriculum and Instruction

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

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

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

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

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

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

Strengths	
Concerns/Questions	More specificity should be offered with regard to content of instructional program. 1 st -6 th and 7 th -12 th is inadequate. Maybe offer the instructional program design in the way in which the Montessori serves multiple grades.



7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	Description of the school calendar does not go far enough. A "modified calendar with a shorter summer break" offers little detail for understanding start and end dates.



8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	This portion lacks a clear description of how the school will ensure students with disabilities will have an equal opportunity of being selected for enrollment.



9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	



10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	



REVIEW SUMMARY

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

Recommendation (Electronically highlight your recommendation)

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

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

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

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

Rationale:

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

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

Revisions Needed:



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

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

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, we rely on each reviewer's summary judgment of the elements and then require a final recommendation as discussed in each section.

Please use the following statements to frame your recommendation:

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

Please consider the whole document and avoid focusing on one aspect in making a final recommendation. It is anticipated that the applicant interviews and committee discussion may impact final recommendations.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using the same rubric.
2. After reviewer comments have been completed the Selection Committee will make recommendations to the Office of Educational Opportunity Director who will compile a letter to each applicant detailing their status within the application process. In cases where additional information is required, the Director shall secure the requested information for the Selection Committee prior to a final recommendation to the Office and the UW System President.
3. When the Selection Committee makes an acceptable recommendation, the Director shall review the results and make a summary recommendation to the System President. The President shall be informed in a summary fashion about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation, the Selection Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.
7. If acceptable contract terms are reached, the Director will seek the approval of the contract from the Board of Regents.
8. No charter will be granted without the approval of the Board of Regents.



Phase II Rubric

Name of Proposed School:	Isthmus Montessori Academy Public
Proposed Location of School: (What municipality?)	Madison
Date:	December 29, 2017
Name and Title of Reviewer:	

Overall Assessment (complete this section last by electronically highlighting your recommendation)

- **Accept for further consideration**
- **Deny**
- **Resubmit with modifications for further consideration**

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

The last page provides space to make your final recommendation and provide evidence to support your recommendation.

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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



1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	-Strong mission alignment and desire to meet needs of students -Very clear on core beliefs and mission
Concerns/Questions	- Contact information for applicants is general contact information for organization. Will the applicants be responsive/available as questions arise and directly respond? - "Madison and surrounding areas"- unclear on what this means. - "the school's demographics will align with city-wide demographics." In which aspects? Race/ethnicity? Socio-economic status? Disability status?



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7/28/2017

- 1.08 notes the unique aspects of the school, but not why the community needs it. That question is, however, addressed in other sections of the application.



2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
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Concerns/Questions	<ul style="list-style-type: none">-Unclear on the "Governance Council" relationship with the Board of Directors of IMA, Inc. It seems from the application that the Governance Council will set forth many of the policies, but the IMA, Inc Board of Directors has final say? I would need clarification on who, exactly the school's official board is that is accountable for executing the contract with OEO before assessing that the application Meets the Standard. For example, it seems that while the IMA Board has final say, it's the Governance Council that is designed to meet state board requirements.- Concern that initial school director may not necessarily have experience within an AMI school.
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3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	- Strong solutions to removing barriers for family participation
Concerns/Questions	- Would like to see more about MMSD Superintendent's formal recommendation for approval as an instrumentality charter.



4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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	- Robust and diverse strategies included for recruitment of students and families
Concerns/Questions	- To what degree have the organizations identified in the application agreed to facilitate recruitment efforts? - Not sure about the legality of enrollment of non-Montessori students being less than 50% of a class.



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	- Robust IMA standards for professional development/credentials.
Concerns/Questions	- Not sure question 1 is adequately addressed with regard to how quality is ensured in the workforce. It does address how the school will encourage employees to pursue leadership roles if interested, but does not mention quality assurance in bringing on staff.



6. Curriculum and Instruction

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

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

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

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

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

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

Strengths	- Strong alignment and research base of Montessori method to school's proposed curriculum.
Concerns/Questions	- For Q6, not sure what is meant by "reasonably written IEP." Would like to see this addressed before a formal recommendation, as that could be subject to interpretation.



7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	- For 7.05, would like to see specific, measurable targets for reduction/elimination of achievement gaps. For example, if a student enters in year 1 two years behind their peer group, then at the end of year five is 1.8 years behind their peer group, would that count for "reduction" of achievement gaps?



8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	- Strong plan/approach to student suspension/expulsion policies.
Concerns/Questions	



9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
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Concerns/Questions

-Applicant mentions several potential funding sources, but it's not clear that those are actual options (such as the example of the US Department of Ed Charter School Grant, which Wisconsin has not been awarded).

10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	



REVIEW SUMMARY

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

Recommendation (Electronically highlight your recommendation)

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

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

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

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

Rationale:

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

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

Revisions Needed:

I believe the application is overall strong and that if implemented as planned, the proposed school has potential to be an asset to students and families in Madison. The proposal makes a strong case for providing a quality, research-backed school option and a commendable focus on serving a diverse set of students and communities.

Throughout the rubric I added a few minor questions and concerns that I would like to see addressed by the proposed school, but ultimately rated the application as needing information because of a couple aspects of the application that when taken together raise some questions for me around the school's academic accountability, which is the cornerstone of strong independent charter schools in our state.

First, the school's governance model is unclear to me, as noted in the rubric. It appears from the application that the IMA board has final say and decision-making authority, but that it's actually the "governance council" that is entering into the contract with OEO. For me to offer a full recommendation of approval, I would need this clarified. If the IMA board is, in fact, making all final decisions and governing the school, they should be the charter holders with all attendant responsibilities, transparency, and liabilities as defined in the charter contract. The governance council may still be a viable and crucial component of the school, but a clear delineation of authority, decision-making, and contracting are absolutely crucial for the accountability (and therefore success) of a charter school.



7/28/2017

Second, the school's proposed methods of evaluations are appropriate for its educational model and curriculum; however, the measurements of academic progress in this application are too vague to be appropriately measured and contracted with OEO. As noted in the rubric above, I believe the application would be stronger with specific measurements. To say that "progress will be made" on achievement gaps without quantifying that progress is not an executable charter contract. That quantifiable measurement is the cornerstone of quality charter authorizing, and without it would not allow OEO to make an informed decision on the school's academic progress for renewal or continuing operations.

If these two issues were addressed satisfactorily in the application, I would likely recommend full approval. The application was quite strong and made clear the expertise, vision, and passion the school leaders have for the proposal and their mission to serve all students and families. That is commendable. However, the application as currently written raises some questions about the school accountability and measurement, which is a minimal yet hugely important aspect of effective public charter school authorizing.

Phase II APPLICATION EVALUATION REVIEWERS GUIDE

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

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

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, we rely on each reviewer's summary judgment of the elements and then require a final recommendation as discussed in each section.

Please use the following statements to frame your recommendation:

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

Please consider the whole document and avoid focusing on one aspect in making a final recommendation. It is anticipated that the applicant interviews and committee discussion may impact final recommendations.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using the same rubric.
2. After reviewer comments have been completed the Selection Committee will make recommendations to the Office of Educational Opportunity Director who will compile a letter to each applicant detailing their status within the application process. In cases where additional information is required, the Director shall secure the requested information for the Selection Committee prior to a final recommendation to the Office and the UW System President.
3. When the Selection Committee makes an acceptable recommendation, the Director shall review the results and make a summary recommendation to the System President. The President shall be informed in a summary fashion about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation, the Selection Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.
7. If acceptable contract terms are reached, the Director will seek the approval of the contract from the Board of Regents.
8. No charter will be granted without the approval of the Board of Regents.

Phase II Rubric

Name of Proposed School:	Isthmus Montessori Academy
Proposed Location of School: (What municipality?)	Madison, Wisconsin
Date:	January 3, 2018
Name and Title of Reviewer:	

Overall Assessment (complete this section last by electronically highlighting your recommendation)

X Accept for further consideration

- ☐ Deny
- ☐ Resubmit with modifications for further consideration

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

The last page provides space to make your final recommendation and provide evidence to support your recommendation.

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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



1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	<p>The applicants meet the standard for this section, because they have provided well-reasoned substantive responses to each of the following questions:</p> <ul style="list-style-type: none">• Provide the name of the proposed charter school.• 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.• Identify how the school will operate as a legal entity under Wisconsin law.
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	<ul style="list-style-type: none">• 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.• State the mission and vision of the school.• State the core beliefs of the school.• Note the unique aspects of the school and explain why the community needs this school.• Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.• Characterize the school culture desired for the school and how this culture will be established.• Describe the process that will be used to develop an initial strategic plan. <p>This achievement is notable, because these are challenging questions, requiring not only multi-faceted, substantive responses, but also careful explanation of principles that are unique to the Montessori teaching method and curriculum.</p>
Concerns/Questions	<p>I have two follow-up questions for this applicant, as follows:</p> <p>(1) From my perspective, the response to this request could be much more robust: "Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices."</p> <p>Although three qualitative research studies are quoted, I wonder why the decades of peer-reviewed research, on a global scale no less, regarding the efficacy of Montessori-based education have not also been cited within this application. In other words, there is sound research and evidence to support the Montessori method, and on a global scale at that. Why is this research not included within the application? I believe citation of peer-reviewed research would set apart this applicant in a very positive way. Thus, at a minimum, I would recommend inclusion of a bibliography of peer-reviewed research with this application, perhaps as an Appendix to the document.</p> <p>(2) I wonder whether the mission statement could be improved, and perhaps it eventually will be through the strategic planning process that is described within this section.</p> <p>At present, the stated mission is to: "...open Madison's first AMI Montessori public school and the first fully inclusive and accessible Montessori school in the area." But this is a goal, not a mission.</p> <p>From my perspective, a mission statement ought to: State the purpose, intended student population, and long-term local, regional, and/or global outcomes of the school.</p>

2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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



Strengths	Again, the applicant has robustly responded to each of the questions asked within the application. Moreover, the responses are substantiated with sound reasoning and specific examples.
Concerns/Questions	<p>I have two substantive concerns, as follows:</p> <p>(1) As described within this section, and specifically in sections 2.07 and 2.11, I wonder whether the Board may be too far removed governance and operational activities to play an effective leadership role. Specifically, the Board's role is relegated to hiring the school principal and approving school policies. Whereas, the Governance Council sets the school's mission, vision, and strategic plan, without needing approval from the Board. Hence, I wonder whether the Board can exercise at least a passive review of the mission, vision, and strategic plan, similar to its review/approval of school policies, so as to ensure that there is a check and balance upon the relatively sizeable amount of power that has been proposed for the Governance Council.</p> <p>(2) I wonder whether the administrative staff will, from an operational standpoint, carry an outsize amount of power on the Governance Council. Which is to say, although I appreciate the fact that students, parents, and community members will comprise the membership of the Governance Council, none of them will have as robust a knowledge of items such as the school budget, hiring practices, student disciplinary issues, etc. Hence, in operation, it is reasonably likely that the school administrators upon the Governance Council will be relied upon to provide substantive knowledge and information to their peers upon the Council.</p> <p>Moreover, parents, students, and community members are not likely to have as long and steady a service record as school administrators. Thus, under the proposed structure for the Governance Council, power and influence may operationally become centralized in the staff members.</p> <p>By comparison, school boards are comprised of elected community members who rely upon school administrators, not as fellow board members, but rather, as invited guests to meetings. This is because, from a policy standpoint, School Boards play an oversight role for school administrators. This is because it is difficult for people to manage their very own selves in an objective manner over the course of time and many years. (Or perhaps most simply stated: I sure would love to decide for myself, how my very own self is performing in my very own job....:) Hence, I wonder whether the school administrators can have ex officio status, instead of peer membership status, upon the Governance Council.</p>

3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	<p>From my perspective, upon review of this section, and in all candor, I am of the opinion that this charter school will advance, sustain, and lend strong credibility to the Office of Educational Opportunity. This conclusion is supported by the three following reasons.</p> <p>First, MMSD School Superintendent, Jen Cheatham, supports creation of the school. By having the support of the school district in which the proposed charter school will be situated, the charter school will be more likely to succeed. This is because public school leaders will be supportive, as distinguished from obstructive, to charter school leaders as they strive to succeed.</p> <p>Second, there is data to demonstrate a strong groundswell of community demand and support for a publicly-funded Montessori school. Again, and as with support from the school district, by having community support, the proposed charter school will be more likely to succeed, because parents and community members will take action to support and sustain the school's activities and core functions.</p>
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	Finally, the focal point of the proposed charter school is to provide access and opportunity to traditionally-disadvantaged students from Madison's poorest communities, including racial minorities and special education students. Hence, the mission of the school is to afford opportunity to those for whom opportunity is rarely afforded. This is a powerful response to community needs, which will facilitate the actualization of human potential in demonstrable ways.
Concerns/Questions	No concerns or questions within this section. Excellence achieved!

4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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	Again, the applicant has provided well-reasoned substantive responses to each of the questions raised within the application. Of notable strength, is the fact that rather than relying solely upon direct student recruitment, school leaders are committed to raising awareness among targeted populations by <i>acting as meaningful partners in support of these communities own initiatives</i> . This is a strength, because it demonstrates the commitment of school leaders to not only building trust with the communities served by the proposed charter school, but also to deeply understanding and serving the needs of these communities. Accordingly, from my perspective, this commitment will engender the long-term sustainability and success of the proposed charter school.
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Concerns/Questions	I have a concern regarding enrollment demand. Because the proposed charter school not only responds to demand from both MMSD and the community, it is reasonably likely that there will be more students seeking to enroll than the school has room to educate. And while I understand from section 4.05 that Wisconsin Statutes Section 118.40(3)(g)(1)-(3) will resolve issues related to enrollment demand by lottery, I wonder how the school will, in turn, manage disappointment from community members whose children are not chosen for enrollment. Moreover, because the statute specifically allows school administrators and teachers to favor enrollment of their own children, I believe that over time the lottery system may cause resentment, as well as potentially diminished support for the proposed charter school, especially if this issue is not proactively planned for, managed, and addressed through a careful planning process. Hence, I would like to see a more robust plan for implementation of a lottery, in response to enrollment demand that is reasonably likely to exceed supply.
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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	Again, the applicant has provided well-reasoned substantive responses to each of the questions raised within the application. Of notable strength, is the fact
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	that this charter school will benefit from Montessori's established pipeline for recruitment, training, and continued development of both school teachers and administrators.
Concerns/Questions	No concerns or questions within this section. Again, I believe the OEO will benefit by affiliation with this charter school, due to its strong community support and foundation in both the American Montessori Society and the Association Montessori Internationale. Moreover, the proposed charter school will work closely with UW researchers and leaders to advance not only student learning but also teacher advancement and leadership development. Finally, school leaders have a proven track record of working with both DPI and the Wisconsin Legislature to ensure that IMAP teachers will qualify for state licensure. Impressive!

6. Curriculum and Instruction

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

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

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

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

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

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

Strengths	Again, the applicant has provided well-reasoned substantive responses to each of the questions raised within the application.
Concerns/Questions	As stated in my review of section 1.07, I am concerned about the relatively weak listing of research in support of the Montessori curriculum and method.



	<p>Because the success of the Montessori curriculum and method is not only well-documented, but also lauded as highly successful within the research literature, I do not understand why the many available, supportive resources are not identified within this application. Toward this aim, here is a weblink from the American Montessori, which provides precisely these types of resources: https://amshq.org/Publications-and-Research/Research-Library/Resources-for-Research/Research-Bibliographies-and-Databases</p> <p>Why not provide them, both in text and as an Appendix, especially seeing as they are readily available? In other words, the homework already has been done for the applicant. They just need to be certain to include it within their application, in my opinion.</p> <p>In addition, the delineation within section 6.02 of the content of the instructional program for each grade level fails to mention the advancement of personalized learning within the fields of curriculum and instruction, educational psychology, special education, and neuroscience. Moreover, because these disciplinary lines of scholarship advance many of the principles and curricular goals that the Montessori curriculum and method have utilized for nearly a century, they would substantiate the curriculum that is proposed by the applicant. In other words, if other disciplines substantiate this curriculum and method, then why not list them within the application, as well?</p>
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7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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



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

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

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

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

Strengths	The applicant has provided well-reasoned substantive responses to each of the questions raised within the application. Of notable strength, is
Concerns/Questions	I have one concern: Will high school graduates have transcripts that demonstrate to colleges and universities both curricular rigor and the level of student success achieved during high school? In other words, the application makes no mention of the transition from school to college, nor student advising and preparation for college and/or career. Why is this so, and what is their plan for assisting students in their transition from high school to college and/or career?

8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

1. Describe how key processes for design and delivery of the educational program will be managed.
2. Describe how instructional content and methodology will be continuously improved.
3. Explain the procedures for ensuring the health and safety of students.
4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
6. Identify key student services and how they will be managed.
7. Describe how key processes that support daily operations will be managed.

8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing.

9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment.

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

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

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

Strengths	The applicant has provided well-reasoned substantive responses to each of the questions raised within the application. Of notable strength, is the applicant's focus on special education students. Many charter schools provide services to students who do not need special education resources, because in many instances, it can be quite expensive to do so. But this applicant actively seeks to serve students with special education needs, and thus, it will provide a critical service to a student population that is often under-served. In addition, the applicant's process for managing student disciplinary incidents is exemplary and distinguishes the applicant from the methods presently utilized by MMSD, which have come under intense public scrutiny over the past 24 months.
Concerns/Questions	None. Although I do note that in section 8.05 the hallmark of their protecting student records is to keep them locked in a room with a locked file cabinet. Because most student records are electronic, including those kept by the vendor with whom the current school already has a contract, and also because DPI has a strict body of requirements related to student data, I do believe that the applicant will need additional knowledge regarding this aspect of legal and business operations.

9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

Strengths	The applicant has submitted well-reasoned responses to each of the in-depth questions presented on the application. Moreover, the applicant has demonstrated experience in managing the finances, and fundraising, for a successful Montessori school.
Concerns/Questions	<p>Although the applicant recognizes the importance of hiring an accounting firm to complete audits in the future, I am concerned that they may not already be working with an accounting firm. In other words, given that this is an established entity I wonder why they do not list their current accounting firm as: a co-author for the budget statement they have submitted in support of this application, and/or as the firm that will complete annual audits in the future.</p> <p>Does this mean they have been managing their own books without assistance from accounting professionals? If so, then we may need to pay particular</p>



	<p>attention to fiscal management with this applicant, especially given the public funding that they will receive and manage, which brings along with it very different accounting and legal requirements than privately-raised funds.</p> <p>Moreover, the list of people who developed the budget statement includes no one with a business, finance, or accounting degree. Hence, the applicant may need to bolster their human resources, as related to managing the finances of a publicly-funded charter school.</p> <p>Finally, within the proposed budget the applicant has itemized only \$10,000 for professional services, including audit, legal, and insurance coverage. I wonder whether this amount will be sufficient for all three of these professional services. Which is to say, I am concerned that they do not know what they do not know about public finance and public school law requirements.</p>
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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. List the legal requirements for operating a public charter school.
2. Describe the policies and procedures developed to address these requirements.
3. Describe the level and types of insurance coverage the board will provide.
4. Explain the school's student records plan for developing and maintaining student achievement, health, emergency contact, high school credit, activities, and the like.
5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

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

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

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

Strengths	All questions have substantive responses.
Concerns/Questions	Because this private school seeks to transition to a public charter school, I wonder whether they do not know what they do not know, in terms of public school law. For example, within section 10.04, the applicants describe how a vendor will manage student records. Because both state and federal law have stringent legal requirements regarding preserving the confidentiality of student records, preserving confidentiality ought to be a key attribute of the services



	<p>provided by this vendor. But, confidentiality is not even mentioned within this section.</p> <p>Moreover, I wonder whether the applicant has a public school law attorney on retainer, or whether they have legal counsel, at all. Hence, I would recommend that the applicant be required to identify legal counsel, and/or to demonstrate that they have developed an understanding of the differences between the legal requirements for a private Montessori school, with which they presently may be familiar, as distinguished from the legal requirements for a publicly-funded charter school, with which they may not have the same level of familiarity.</p>
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Please use your assessment of the 10 criteria to make a decision regarding your recommendation for the application below.

Recommendation (Electronically highlight your recommendation)

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

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

Thank you, Gary, for the opportunity to review and provide comment upon this submission. I truly appreciate it and wish you the greatest success as this charter school (hopefully) develops.

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

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

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

Rationale:

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

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

Revisions Needed:

Phase II APPLICATION EVALUATION REVIEWERS GUIDE

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

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

The Office of Educational Opportunity's rubric model does not use a numeric rating system; instead, we rely on each reviewer's summary judgment of the elements and then require a final recommendation as discussed in each section.

Please use the following statements to frame your recommendation:

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

Please consider the whole document and avoid focusing on one aspect in making a final recommendation. It is anticipated that the applicant interviews and committee discussion may impact final recommendations.

Process to be followed to incorporate reviewer comments and recommendation:

1. All reviewers will be expected to make a summary judgment using the same rubric.
2. After reviewer comments have been completed the Selection Committee will make recommendations to the Office of Educational Opportunity Director who will compile a letter to each applicant detailing their status within the application process. In cases where additional information is required, the Director shall secure the requested information for the Selection Committee prior to a final recommendation to the Office and the UW System President.
3. When the Selection Committee makes an acceptable recommendation, the Director shall review the results and make a summary recommendation to the System President. The President shall be informed in a summary fashion about the program, substantive basis for the recommendation and a timeline for potential implementation of the charter. The Director shall prepare these documents.
5. The recommendation of the Director shall be final in these matters. If the Director decides not to accept the recommendation, the Selection Committee shall be informed of this decision.
6. If a recommendation for authorization is accepted then contract negotiations will commence.
7. If acceptable contract terms are reached, the Director will seek the approval of the contract from the Board of Regents.
8. No charter will be granted without the approval of the Board of Regents.

Phase II Rubric

Name of Proposed School:	Isthmus Montessori Academy Public
Proposed Location of School: (What municipality?)	Madison
Date:	1/16/18
Name and Title of Reviewer:	

Overall Assessment (complete this section last by electronically highlighting your recommendation)

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

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

The last page provides space to make your final recommendation and provide evidence to support your recommendation.

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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

1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	<p>The Montessori model has been very successful among diverse population of students and allowing the first public Montessori school for Madison families is tremendous.</p> <p>Desire to align the school's demographic with the city-wide demographics.</p> <p>Since it is an existing school helps to determine a more predictable opening that with a start-up.</p>
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Concerns/Questions	Since the school is already in operation, will the classroom projections given allow for new students to attend the school or are these numbers just allowing the continuation of current students only?
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2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	Experienced school leaders and board of directors (IMA)
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Concerns/Questions	For clarity, is the IMA board or the Governance Council governing the school?
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3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	School has detailed a number of ways it has or will engage the community. Family liaisons and the DEEP meetings are particularly great examples of this engagement. Also, the relationship with community organizations (i.e. Black Girls are Magic and East Side Community Center) are positive.
Concerns/Questions	



4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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	Recruitment plan is clear. The means detailed that will be used to achieve a racial and ethnic balance are solid and though the process for charter school enrollment is open, the recruitment plan shows the commitment to ensure a diverse student population.
Concerns/Questions	I think I've just missed it, but are the current students of the school given priority in the school? If so, are there additional seats to ensure the diversity desired can be obtained? (similar question I asked in section 1)



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	Alternative pathway for state teaching license
Concerns/Questions	

6. Curriculum and Instruction

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

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

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

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

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

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

Strengths	The leaders clear knowledge and experience with the Montessori method is so important.
Concerns/Questions	Once students enter high school (9 th grade) will the program turn completely to the IB model or will the Montessori method still be incorporated to any degree?



7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	Will keep individual education plan while implementing the IB program for high school students is a plus and answers my previous question.
Concerns/Questions	

8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	The Montessori model is designed to deal positively with student discipline matters and is another positive factor of the model.
Concerns/Questions	Is there a discipline plan or just the information outlined in the application?

9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	Is the school providing transportation services at a cost to families? (9.06)



10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

Strengths	
Concerns/Questions	



REVIEW SUMMARY

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

Recommendation (Electronically highlight your recommendation)

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

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

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

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

Rationale:

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

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

Revisions Needed:

Gary Allen Bennett
Director, UWSA Office of Educational Opportunity
1220 Linden Drive Suite #1744
Madison, WI

January 31, 2018

Superintendent Tony Evers
Wisconsin Department of Public Instruction
125 S. Webster Street
Madison, WI 53703
(CC: Tricia Collins and Latoya Holiday)

Dear Superintendent Evers,

Wis. Stat. 118.40(2x) grants the University of Wisconsin System Administration's Office of Educational Opportunity ("OEO") the authority to "contract with a person to operate a charter school." OEO's charter authorizing power is subject to numerous enumerated statutory limitations. One such limitation is prescribed in Wis. Stat. 118.40(1), which in relevant part requires OEO to "notify the state superintendent of its intention to authorize a charter contract by February 1 of the previous school year."

This letter is sent in accordance with Wis. Stat. 118.40(1)'s notice requirements for contracts intended to be granted by OEO.

Subject to final review by the University of Wisconsin System Board Of Regents ("BOR"), OEO intends to enter into a charter contract with International Montessori Academy Public ("IMAP") for a school located in Madison, Wisconsin.

In short, IMAP will utilize curriculum and instruction practices aligned with those of the Association Montessori Internationale for grades PK-9 and the International Baccalaureate model of education for grades 10-12. IMAP intends to initially serve grades 4K-9 and may scale up to serve grades 10-12 in year four of their initial contract.

For reference, IMAP intends to operate with a maximum pupil enrollment of 184 in years one and two of the contract; 238 in year three of the contract; 384 in year four of the contract; and up to 389 in year five of the contract.

Please advise my office if you need any additional information.

Sincerely,



Gary Allen Bennett
Director, Office of Educational Opportunity
University of Wisconsin System Administration