

PHASE II APPLICATION - REVIEWERS GUIDE

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

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

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

Please use the following statements to frame your final recommendation:

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

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

Process to be followed to incorporate reviewer comments and recommendation:

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

Phase II Rubric

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

| |
|--|
| <p>Final Recommendation (complete this section last by electronically highlighting your recommendation)</p> <p><input checked="" type="checkbox"/> Accept for authorization</p> <p><input type="checkbox"/> Deny</p> <p><input type="checkbox"/> Resubmit with modifications for further consideration</p> |
|--|

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

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

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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

1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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|--------------------|------------------------------|----------------------------|
| | | |

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

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

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

3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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.)

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

5. Faculty and Staff

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

6. Curriculum and Instruction

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

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

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

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

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

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

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

7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
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Identify strengths or concerns. (Use as much space as needed.)

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

8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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



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

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| x | | |

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

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

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

Electronically highlight your summary assessment

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

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

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

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

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

Rationale:

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

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

Revisions Needed:

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Phase II Rubric

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

| |
|---|
| <p>Final Recommendation (complete this section last by electronically highlighting your recommendation)</p> <p><input checked="" type="radio"/> Accept for authorization</p> <p><input type="radio"/> Deny</p> <p><input type="radio"/> Resubmit with modifications for further consideration</p> |
|---|

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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.
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10. Characterize the school culture desired for the school and how this culture will be established.
11. Describe the process that will be used to develop an initial strategic plan.

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

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

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

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

2. Governance and Leadership

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

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

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

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

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

3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

1. Describe the marketing program that will be used to inform the community about the school.
2. Explain how students will be recruited for the program.
3. Describe the means by which the school will achieve a racial and ethnic balance 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 | Evidence of strong efforts to build relationships and build connections in community. School seems to be welcomed by the community. Website is inviting and informational |
| Concerns/Questions | |

5. Faculty and Staff

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

6. Curriculum and Instruction

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

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

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

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

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

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

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

7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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



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

10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

SUMMARY ASSESSMENT

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

Electronically highlight your summary assessment

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

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

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

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

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

Rationale:

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

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

Revisions Needed:

PHASE II APPLICATION - REVIEWERS GUIDE

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

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

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

Please use the following statements to frame your final recommendation:

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

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

Process to be followed to incorporate reviewer comments and recommendation:

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

Phase II Rubric

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

| |
|--|
| <p>Final Recommendation (complete this section last by electronically highlighting your recommendation)</p> <p><input type="checkbox"/> Accept for authorization</p> <p><input checked="" type="checkbox"/> Deny</p> <p><input type="checkbox"/> Resubmit with modifications for further consideration</p> |
|--|

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

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

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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

1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

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

3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

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

5. Faculty and Staff

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

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

6. Curriculum and Instruction

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

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

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

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

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

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

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

7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

| | |
|--------------------|---|
| Strengths | Because the State of Wisconsin has a core set of required assessment tools for students, ACS meets many of the requirements of this section. |
| Concerns/Questions | I do not understand who will observe teachers in the classroom and provide feedback and mentoring, as they strive to improve their teaching and learning practices. |

8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

| | |
|--------------------|---|
| Strengths | (1) School discipline will be based upon a restorative justice model. (2) Conflict resolution will be based upon Montessori pedagogy, as well as the Peace Learning Center. (3) Students with disabilities will be co-educated in the same manner and quality as any other student. |
| Concerns/Questions | (1) There is no identified role for school leaders. Instead, staff are expected to self-select a peer leader. Yet, having an identified school leader is essential for the continuous improvement of schools, teachers, and students as they strive to succeed, each in their respective roles. (2) The design of the educational program did not involve teachers or school leaders. |

9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |

10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

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

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |

SUMMARY ASSESSMENT

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

Electronically highlight your summary assessment

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

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

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

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

Rationale:

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

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

Revisions Needed:

Phase II Rubric

| | |
|--|------------------------|
| Name of Proposed School: | Arbor Community School |
| Proposed Location of School: (What municipality?) | |
| Date: | 25/1/2019 |
| Name and Title of Reviewer: | |

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

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

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

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

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

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

The following definitions should guide the ratings:

Meets the Standard:

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

Partially Meets the Standard:

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

Does Not Meet the Standard:

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



1. School Design Key Questions

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

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

Evaluation Criteria: A response that meets the standard will:

- X1. Provide the name of the proposed charter school.
- X2. Provide the name(s), address(es), telephone number(s), and email address(es) of the organization or individuals submitting the application to create a charter school.
- X3. Identify how the school will operate as a legal entity under Wisconsin law.
- X4. Describe the student body to be served by the school and, for each of the first five years, indicate the grades the school will house, the number of expected students per grade, and the expected number of students per class.
- X5. State the **mission** and **vision** of the school.
- X6. State the core beliefs of the school.
- X7. Explain how the mission, vision, and core beliefs are grounded in specific research or demonstrated best practices -
- X8. Note the unique aspects of the school and explain why the community needs this school.
particularly data from Center for healthy minds
- X9. Describe how the mission and core beliefs will drive decision-making during the development and operation of the school.
- X10. Characterize the school culture desired for the school and how this culture will be established.
- X11. Describe the process that will be used to develop an initial strategic plan.

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

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

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

| | |
|-----------|---|
| Strengths | <ol style="list-style-type: none"> 1. The school founders' unwavering belief in the ability of students and the potential for the community is present in the application. However, translating this optimism into academic opportunities and outcomes may be more difficult than the founders anticipate given significant opposition to the concept and unclear financial plans. |
|-----------|---|



| | |
|--------------------|---|
| | <ol style="list-style-type: none">2. Links to the Center for Healthy Minds would provide research legitimacy to the model, but it may limit access to and interest in the school. |
| Concerns/Questions | <ol style="list-style-type: none">1. Mission ambiguity: the mission needs a more measurable component, particularly since the model is less defined.2. Concept and Enrollment: the narrowly tailored vision and role may limit the pool of students who will opt-in to the school; low enrollment will inevitably create operational difficulties if not outright insolvency.3. Concept and Expenses: Translating the broad based vision and PBL model may result in extraordinary staffing, facility, and equipment expenses. Does the business plan fully consider the costs of translating this ambitious vision into reality. |

2. Governance and Leadership

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

Evaluation Criteria: A response that meets the standard will:

- X1. Identify the organization and individuals involved in the development of the school.
- X2. Describe how this organization and/or these individuals individually and collectively, embody the characteristics, skills, and experience necessary to establish the school as an effective, stable organization.
- X3. Describe the board that will be created to lead the school.
- /4. Describe the process to be used for the selection of board members. **More evidence of intentionally diverse and qualified Board recruitment / retention is needed. Prior conversations about the applicant indicate such efforts are underway, but the breadth of outreach is missing from the application.**
- X5. State the general duties of board members.
- /6. Explain how the governance of the school will embody principles of democratic management, including but not limited to family participation. **Generally good, but I would like to see more information about ongoing relationship building beyond the annual meeting. How will the multiple stakeholders build a community that attracts students and staff; and then retains them?**
- /7. Explain how the board will establish policy and work with educators to promote the goals of the program. **Generally strong concept, but no clear process or procedural plan.**
- X8. Attach a copy of the by-laws of the board (if available).
- X9. Attach a copy of articles of incorporation as defined by Wisconsin law.
- X10. List the names and occupations of individuals who will serve on the initial school board (if available).
- X11. Explain how the school will operate in terms of lines of authority and responsibility.
- X12. Identify the position(s) and the level of expertise of the individual(s) responsible for managing the school and the manner in which administrative services will be provided.
- 0 13. Identify the criteria to be employed in hiring the school director/principal. [Listed as N/A, there will need to be a director, principal of record.]**
- X14. If the charter school will be managed/operated by a third party, identify the organization and its role in the charter school operation. **N/A**

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

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

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

| Strengths | |
|--------------------|--|
| Concerns/Questions | <ol style="list-style-type: none"> 1. Governance: Micro-schools come with their own governance challenges, particularly around regulatory compliance, oversight on student services, and financial management. It is strongly recommended the Board consistently include a member with significant financial management or background. Additionally, it is strongly recommended that the Board consistently consult with micro-schools across the country to identify potential issues and review potential solutions to issues. 2. Leadership: Clarification on I am unclear on the school leader answer. Whether the school staff share administrative responsibilities, there will still need to be an administrator of record for both state and federal reporting purposes. |
| | |



3. Community and Family Engagement

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

Evaluation Criteria: A response that meets the standard will:

/1. Describe the community the school will serve. **The proposal provides a vague concept without specific callout to how particular subgroups will be attracted to the school and retained on the campus; similar concerns about how staff will be attracted/retained.**

/2. Explain how the community has been involved in developing the school. **Written documentation does not reflect active engagement that has occurred through out their application.**

/3. Explain how the community will be involved in the operation of the school. **The lack of geographic specific plans and enrollment strategies cause me concern.**

/4. Describe community partnerships the school will have or hopes to have. **Some listed partners have already rejected partnership, e.g. Aldo Leopold. This causes me concern about (a) the accuracy of the application and (b) the long-term viability of partnerships given significant oppositional forces.**

/5. Describe how relationships to attract and retain students, enhance student learning, and satisfy students and stakeholders will be built. **The proposal does not go beyond "opt in" based involvement. Self-selection is a part of a lottery-based public school, but there needs to be proactive engagement to make sure a diverse set of families (a) know they can opt in; (b) know what they would be opting in to; and (c) why they would want to stay. /**

/6. Describe how requirements, expectations, and preferences of students, families, and other stakeholders will be determined. **I would prefer more robust planning on stakeholder investment and participation in the school – particularly more than on an annually basis.**

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |

4. Marketing, Recruiting, and Admissions

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

Evaluation Criteria: A response that meets the standard will:

/1. Describe the marketing program that will be used to inform the community about the school. **General conceptual plan is there, but not sure that it is based on market research re: student / family demand or a concept the founders personally want.**

/2. Explain how students will be recruited for the program. **Community partnership engagement in enrollment needs to be significantly beefed up if the school is going to hit enrollment targets. Barriers such as transportation, risk of a start-up school, and local opposition to the school cause me concern.**

/3. Describe the means by which the school will achieve a racial and ethnic balance among its pupils. **The proposal makes equity and inclusion a priority, but beyond the governance board and multi-lingual informational posters, how the commitment becomes real remains unclear. Given difficulties faced by OEO's two existing schools and Madison's hyper racial and economic segregation, I believe a more aggressive and strategic enrollment strategy is needed.**

4. Describe admission policies and practices to be used to enroll students the first year and succeeding years.

Question: Is Arbor willing to cap the amount of statutory enrollment preferences for staff etc?

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

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

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

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

| Strengths | |
|--------------------|--|
| Concerns/Questions | <ol style="list-style-type: none"> 1. Visibility: I am concerned about how the school will overcome the outward hostility launched at the proposal. Many students and families are cautious about trying a new school; how will the founders create positive visibility in the community? 2. Enrollment targets: Existing start-up schools across Wisconsin face significant marketing and enrollment challenges. The founders need a more robust plan but the plan cannot violate the spirit or the letter of the law on recruitment (e.g. no incentives for applications or enrollment). |



| | |
|--|--|
| | <ol style="list-style-type: none">3. Market-study: Are there enough identified potential students who want / need the model? Or are the founders opening based on hope and optimism?4. Financials: Does the budget fully contemplate the cost of recruiting and educating families? How will market penetration actually happen? Who will fund info sessions? Who will fund recruitment materials? How will mailing lists be identified or purchased? It would be worth connecting the founders with UW-M's PBL micro-school to identify recruitment and enrollment strategies that worked and those that did not.5. D&I Beyond Mailers: Given Madison's alarmingly high segregation rates, how do the founders propose to gain access to recruitment opportunities with community groups or organizations that serve Madison's diverse population?6. Transportation: I may have missed it, but is there a strategy around transportation to bolster enrollment? It is highly unlikely the city bus union will provide any discounted or partnership rate to transport students – so funding would need to be considered.7. Lottery waiver: Are the applicants indicating a limit on the number of lottery-waiver students? If so, it may limit staff recruitment. |
|--|--|



5. Faculty and Staff

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

Evaluation Criteria: A response that meets the standard will:

/1. Identify how administration, faculty, and staff will be recruited and how the school will ensure the quality of the workforce. **National recruitment strategies are failing at existing districts and networks. The organizations and methods described are optimistic and may fail. Significant work needs to be put into securing staff on all levels. The application seems to ignore the impact of local climate may have on recruitment and retention.**

X2. Describe how job requirements, compensation, career progression, workforce practices, and work environment will motivate faculty and staff to achieve high performance. **I am concerned about how the PBL concept and limited number of students will make PD difficult, if not cost-prohibitive. We need to consider recruitment and retention across a broad range of content areas and sub-skills. We also need to consider how the admin staff will be recruited and retained.**

X3. Describe how the faculty and staff education and training programs will support the achievement of overall objectives.

X4. Describe how the work environment will foster learning and continuous improvement for both staff and students. **I am concerned the fluidity of the concept may limit staff and student potential. PBL is incredibly difficult to execute. Given limited success from other WI models, I am concerned that the work environment plan needs to focus more on PD for staff**

X5. Describe how the school will meet the requirement that all instructional staff hold a license or permit to teach issued by the Department of Public Instruction.

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

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

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

| Strengths | |
|--------------------|--|
| Concerns/Questions | <ol style="list-style-type: none"> 1. Staff recruitment and retention: The intentional attacks by district leadership and former board members may create larger barriers than the founders and initial board expect. 2. Staff development: What partnerships exist or will exist to train core faculty and support staff on the model? What long-term planning exists for building their own staff beyond on relying on national entities and broad based searches? |

6. Curriculum and Instruction

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

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

/1. Describes the educational program of the school. **Generally, leans on PBL summary without much site specific content concepts. Significant concerns about the location – how will nature based activities occur on Atwood?**

/ 2. Identifies the content of the instructional program. **Conceptually sound, but the nature of the school makes additional (and desired) details difficult to identify.**

X3. Characterizes the instructional methodology to be utilized by the faculty.

/4. Explains how chosen instructional content and methodology will achieve the school's objectives. **References back to a prior section without adding additional nuance or detail on the content / instruction side.**

X5. Describes the research that supports this approach to educating children.

/6. Describes the program design, methods, and strategies for serving students with disabilities and for complying with all related federal laws and regulations. **The proposal lacks sufficient evidence of an understanding of the cost to comply with special education law, particularly within an independent / PBL setting. I would request additional planning information on how the school would (a) fund special education costs and (b) secure employees directly or contract based support. Given MMSD's open hostility to the school it is likely extraordinarily unlikely that the Board would approve contract based support services for Arbor.**

7. Describes the program design, methods, and strategies for serving students who are English language learners and for complying with all related federal laws and regulations. **The proposal lacks sufficient evidence of an understanding of the cost to comply with dual language services, particularly within an independent / PBL setting.**

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |

7. Standards, Assessment, and Accountability

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

Evaluation Criteria: A response that meets the standard will:

/1. Describe the standards on which the educational program will be based. **CC aligned, but the plan lacks sufficiently articulated standards regarding how the C&I will be developed, executed, or monitored..**

/2. Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined. **A standardized test would need to be selected prior to the execution of any contract as the application provides a list of multiple options – but no plan.**

X3. Describe the requirements for high school graduation (if applicable).

X4. Define how the results of the educational program will be assessed.

X5. Describe the student achievement goals that will be met during the first five years of operation.

X6. Describe how the school will ensure the quality and availability of needed data and information.

X7. Describe how standards, assessment, and accountability will be integrated into a coordinated system.

X8. Describe how effective performance management systems will be provided to improve student and organizational performance.

X9. Describe the school calendar for the first year of operation, the number of days of instruction to be provided during that year, the length of the school day, and the number of minutes of instruction per week for each subject.

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |



8. Educational Support Processes

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

Evaluation Criteria: A response that meets the standard will:

- /1. Describe how key processes for design and delivery of the educational program will be managed. **What happened to the nature focus?**
- 2. Describe how instructional content and methodology will be continuously improved. **Unclear /how the PBL will occur in practice.**
- 0 3. Explain the procedures for ensuring the health and safety of students. **Significant concerns about the lack of understanding of complying with special education law.**
- /4. Identify the procedures for school discipline, suspension, and potential removal of a child from the program.
- X5. Describe the methodology for maintaining pupil records and ensuring accurate record keeping in regard to student attendance, achievement, health, activities, and emergency contacts.
- /6. Identify key student services and how they will be managed. **Concerns about special education again.**
- /7. Describe how key processes that support daily operations will be managed.
- /8. Describe the special education program to be provided including governance, pupil identification, development of IEPs, delivery of special education and related services, and program financing. **The founders seem to not understand the role and function of special education in compliance terms. The phrase PBL inherently serves "all students" is a solid talking point, but I am not sure a full recognition of compliance is present.**
- /9. A clear description of how the school will ensure that students with disabilities will have an equal opportunity of being selected for enrollment. **Not sure if the school has fully executed an enrollment strategy, but this could be remedied in contracting.**

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |



9. Business and Financial Operations

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

Evaluation Criteria: A response that meets the standard will:

/1. Identify the individuals and their level of expertise who were involved in developing the schools financial plan. **Long term viability for micro-school financing and lending for the building cause significant concerns.**

02. Identify the position and the level of expertise of the individual(s) who will be responsible for managing the business aspects of the school. **Signiicant concerns – who will the school leader be? I understand it is a teacher led school, but who is the administrator of record? A CESA? An EMO? Who?**

03. Identify how capital required to plan and open the school will be obtained. If funds are going to be borrowed, identify potential lenders and the amount of the loan required. **Significant concerns, particularly given proposed personal debt and a lack of understanding of the costs related to special ed / other special services.**

O 4. Identify the potential site of the school, how the site will be procured, the estimated cost of procurement, and the estimated cost of construction and/or renovation.

The site is located in a densely urbanized area that is disconnected from the original proposal. How will students access nature? Will they walk across major roads? How does this meet the contingency?

O 5. Provide a description of the school facility, or proposed facility, and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility.

Significant concerns about physical layout – would need to check with legal on compliance?

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

It is unclear how the proposed contract will be secured – do they have a vendor? Based on costs seen at other schools, I am not sure this is a viable budget.

X7. Describe how food services will be provided for students.

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

See concerns about micro-school funding.

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

/10. Identify the critical levels of enrollment and revenue required to insure sufficient cash flow for program operation. **Some concerns about micro-school budget and contingency plans if enrollment targets aren't hit.**

X11. Show how the budget addresses the unique aspects of the school.

X12. Describe the plan for annually auditing the schools finances and identify the firm which will conduct the audit (if selected).

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

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |

10. Legal Requirements and Procedures

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

Evaluation Criteria: A response that meets the standard will:

- X1. List the legal requirements for operating a public charter school.
- X2. Describe the policies and procedures developed to address these requirements.
- X3. Describe the level and types of insurance coverage the board will provide.
- 4. Explain the school's student records plan for developing and maintaining student Xachievement, health, emergency contact, high school credit, activities, and the like.
- XX5. Identify how students, staff, faculty, and parents will gain an understanding of the rights and responsibilities these requirements create

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

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

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

| | |
|--------------------|--|
| Strengths | |
| Concerns/Questions | |



REVIEW SUMMARY

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

Recommendation (Electronically highlight your recommendation)

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

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

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

- Unsatisfactory: The proposal requires extensive work and the planning group needs to reevaluate its goals for the program. Working with a consultant may be advisable.

Does not fit within University's charter expectations.

I have significant concerns about the ability of the founders to recruit staff given ongoing battles; I also do not believe the location meets the proposed concept. At this phase I believe we should reject the proposal.

- The proposal is lacking in research to support the program design and may wish to seek a charter from an organization other than the University.

Rationale:

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

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

Revisions Needed: