

STATE BOARD OF EDUCATION – TOPIC SUMMARY

Topic: Request for State Board Sponsorship: Sequoia Montessori Charter School

Date: July 1, 2014

Staff/Office: Kate Pattison/Office of Learning; Cindy Hunt/Office of the Deputy Superintendent

Action Requested: Informational Only Adoption Later Adoption Adoption/Consent Agenda

ISSUE BEFORE THE BOARD:

Whether to sponsor the Sequoia Montessori Charter School located in the Salem-Keizer School District.

BACKGROUND:

The Sequoia Montessori Charter School (SMS) is a proposed comprehensive 1-3 charter school located in the Salem-Keizer School District (SKSD) using the Montessori model reaching out to English language learners (ELL) and students living in poverty. The projected enrollment for the first year is 60 students in grades 1-3. The Salem-Keizer School District has an enrollment of approximately 40,233 students.

Sequoia Montessori Charter School plans to use the Montessori model, a research- and evidence-based education program founded on a student-centered and student-driven philosophy. There are no public Montessori options within the Salem-Keizer School District.

ORS 338.075 states “If a school district board does not approve a proposal to start a public charter school pursuant to ORS 338.055, the applicant may request that the State Board of Education review the decision of the school district board.”

Sequoia Montessori Charter School submitted its initial application to the Salem-Keizer School District for sponsorship and was denied in December 2011. SMS developers submitted a remediated proposal on October 19, 2013 and were denied sponsorship again by the SKSD on December 10, 2013. The basis for the 2013 Salem-Keizer School District denial was *ORS 338.055(2)(b)The demonstrated financial stability of the public charter school*. No other criteria were evaluated.

On December 18, 2013, the Oregon Department of Education (ODE) received Sequoia Montessori’s appeal and request for sponsorship by the State Board of Education. Following the established appeal and sponsorship process, Department staff conducted a substantive review of the proposal using criteria set forth in ORS 338.045 and 338.055. A review panel consisted of internal and external reviews with expertise in curriculum, school finance, governance and innovative learning models. The initial review was completed in January 2014 and the initial review panel indicated the proposal was strong overall with the budget as the primary area of concern.

Based on the results of the initial review, ODE requested additional information to be considered with the proposal and supporting materials. ODE staff met with the developers to discuss the initial review and information requested. SMS developers were asked to submit a revised budget including a supporting narrative and documentation related to potential facilities. In addition to budget information, ODE requested information related to community, target population, diversity, and transportation. ODE staff completed a review and evaluation of all information provided by SMS and determined the proposal and additional materials **meets** the requirements in ORS 338.045(2) and evaluation criteria in ORS 338.055(2).

Salem-Keizer School District staff and the Sequoia Montessori Charter School developers were provided with the opportunity to address the charter school subcommittee in May 2014. This item was before the State Board of Education for discussion and decision at June 2014 meeting. The board voted 3 to 1 to approve the sponsorship. Four votes are necessary for a motion to be approved by the State Board. The State Board decided to reconsider the Sequoia Montessori Charter School sponsorship request at a special meeting with more board members present.

This item is now before the board for a final decision at the July 2014 special meeting.

POLICY QUESTIONS:

None at this time.

STAFF RECOMMENDATION:

The Deputy Superintendent and ODE Staff recommend the State Board of Education sponsor the Sequoia Montessori Charter School. Based on national best practice, ODE staff recommends at least a 14 month incubation period prior to opening which would include specific conditions precedent to operation. The recommended conditions precedent to operation include, but are not limited to, securing facilities, arrangements for student transportation, evidence-based assessments and measures for student academic performance in grades 1-2, evidence of successful recruitment and hiring practices with candidates who reflect the target population the school hopes to serve, cultural competency plan, English Language Learner plan and aligned professional development, and charter board training and succession plan.

ATTACHMENTS:

Combined Report: Oregon State Board of Education Charter School Proposal Review and Analysis Rubric, SMS Proposal, Supporting Documents, Salem-Keizer School District Denial Materials, and Additional Information Requested

**Oregon State Board of Education
Charter School Proposal Review and Analysis Rubric**

<p align="center">Proposal Requirements ORS 338.045 (2)</p>	<p align="center">Evidence, Preferable Factors, Rating and Rationale</p>
<p>(a) The identification of the applicant</p>	<p>Applicant identification is evidenced by a listing of the names of key school founders.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> <i>Specification of each person’s role with the proposed school and relevant experience/expertise.</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> Section meets criteria.</p> <p>Founders and relevant expertise are identified. The Application would be strengthened by describing the intended role for each founder in the proposed school.</p> <p>Person’s experience/expertise identified. Could use more clarification of specific roles.</p> <p>Provides names, email addresses, occupation, name of board members, professions as well.</p> <p>Applicant is identified and key founders provided.</p>
<p>(b) The name of the proposed public charter school</p>	<p>The proposed public charter school name is evidenced by a clear indication of the name.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> <i>A consistent use of the name throughout the proposal.</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> Meets criteria.</p> <p>Name is used consistently.</p> <p>Consistent name used.</p> <p>Appears throughout the documents, is consistently named</p> <p>The charter school is named Sequoia Montessori School</p>
<p>(c) A description of the philosophy and mission of the public charter school</p>	<p>The philosophy is evidenced by a clear description of the proposed school’s approach to education. The mission is evidenced by clear statements that convey the school’s vision for the education of its students.</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Clear, focused and compelling</i> • <i>Likely to improve education outcomes</i> • <i>Expresses a clear guiding purpose</i> • <i>Identifies priorities that are consistent with the intent of ORS 338.015</i> <p> <input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>Section meets criteria and all of the preferable factors, as well.</p> <p>Assuming that the region does not already have a tuition-free Montessori school, the Applicant satisfies the requirement of an innovative program for the region.</p> <p>Description of the approach and philosophy are clear and complete (ps. 3 – 7).</p> <p>Clear adherence to Montessori philosophy.</p> <p>Pg 3-8, well-articulated single purpose, with details supporting this constructs within the missions statement/philosophy</p> <p>The school plans to follow a classic Montessori curriculum and provides evidence that this curriculum and style of learning has improved educational outcomes in similar schools.</p>
<p>(d) A description of the curriculum of the public charter school</p>	<p>The curriculum description is evidenced by an explanation of the instructional approach/methodology and an outline of each content area addressed within the public charter school. <i>The description includes how the school’s comprehensive education program will meet the needs of ALL students, particularly academically low-achieving students</i></p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Curriculum framework is clearly presented, aligned with the school’s mission, and provides an appropriate level of detail for objectives, content, and skills for each subject and for all grades the school will serve</i> • <i>Curriculum is supported by research and/or by applicant experience</i> • <i>Educational program is a good match for the target student population</i> • <i>A clear outline of how the school will monitor the implementation of the curriculum</i> • <i>A cohesive and coherent description of all components</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>Limited number of curriculum strategies and opportunities for meeting standards. For example, strategies in 2nd grade math mostly include “Golden Beads”, “Bead Bars” and “Bead Chains”. While the description of how each content area will be addressed, it did not include a description of how its educational program would meet the needs of academically low-achieving students. In another section, the applicant stated that it would use “peer-to-peer mentoring or one-on-one teacher time” as strategies for serving low-achieving students, but this was not a sufficient description of how these students would be served.</p> <p>Curriculum framework is well defined, aligned with the mission and state standards, and supported by references to research (p. 9-21, Documents showing Math and LA state standards crosswalked to Montessori materials and activities, and Common Core Standards: An Opportunity for Montessori to Shine).</p> <p>The Application would be strengthened by a description of the specific Professional Development activities and systemic supports that will effectively monitor the implementation of the curriculum.</p> <p>Adequate description of supports available for low achieving students (ps. 17-22, 40, 51, 52, 56).</p> <p>Clear adherence to Montessori philosophy.</p> <p>Overview of curriculum provided within the original application with reference to Appendix F which was the full curriculum. Concerns about CCSS alignment and the Montessori curriculum were addressed in the appeal and included a detailed outline of the standards and lessons. Samples of the curriculum alignment to Oregon State Standards was sufficient for this rater with regard to meeting the requirement.</p> <p>A curriculum is provided for all grade levels aligned to state standards. The Montessori curriculum is well known and accepted in many private and charter schools across the country. Details are provided for how the learning style and curriculum will meet the learning needs of all student populations.</p>
<p>(e) A description of expected results of the curriculum and the verified methods of measuring and reporting objective results that will show the growth of knowledge of students</p>	<p>Proposal outlines in detail the expected results of the curriculum, such as student and school outcomes and goals. Plans to measure outcomes with verified methods and objective reporting are evidenced by a well- developed and comprehensive plan for assessing student and school goals. Oregon State Assessments and other means of yielding data allowing comparisons with other public schools are clearly described.</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
<p>attending the public charter school and allow comparisons with public schools</p>	<p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Alignment with school’s mission</i> • <i>Goals are clear, specific, measureable, ambitious and attainable</i> • <i>Objectives follow clearly from the goals</i> • <i>A clear plan for the school to meet AYP</i> • <i>Clear realistic strategies for improving student achievement and closing achievement gaps</i> • <i>Understanding of and strategy for complying with state achievement and reporting requirements</i> <p><input checked="" type="checkbox"/> 3 Meets <input type="checkbox"/> 2 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>This section describes how results may be monitored and reported, but does not actually describe the expected results of the curriculum.</p> <p>Internal assessments aligned with the Montessori approach are well defined.</p> <p>The assessment of English Language Learners is well documented (ps. 22) but the assessment of non-ELL students is lacking.</p> <p>The Application would be strengthened by the identification of the formative assessments that will allow for comparison to other public school students, and which support the identification of learning needs.</p> <p>Given that they are proposing a grade 1-3 school, their assessment and reporting explanations are sufficient.</p> <p>Strategies are referred to as research based and monitored with internal assessments and observation. Student progress is reported of and a report card is available for review in Appendix H. The goals for meeting AYP are absent</p> <p>The applicant plans to open grades first through third in its first year of operation but only plans to use the required third grade state testing. No measureable goals were provided for the desired outcomes of this testing. Although an example report card was provided it was not clear how entering students would be tested to measure their academic skill level or how student success in grades one and two would be measured in a way that comparisons could be made with district students.</p>
<p>(f) The governance structure of the public charter school</p>	<p>The governance structure is evidenced by assurances of non-profit and tax-exempt status and description of key features of the</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>school’s governance model.</p> <p>Preferable factors:</p> <ul style="list-style-type: none"> • <i>Proposed board members will contribute a wide range of experience and expertise needed to oversee a successful charter school such as education, management, financial planning and community outreach</i> • <i>Comprehensive plan for providing board training</i> • <i>Clear description of selection and removal procedures, term limits, meeting schedules, and powers and roles of board members</i> • <i>Clear distinction between the roles and responsibilities of the board members and school administrators</i> • <i>Plan for meaningful involvement of parents and community members in the governance of the school</i> • <i>Sufficient time, money and personnel allocated for planning and start-up prior to the school’s opening</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>Applicant describes board members’ experience, and the distinction between the administrator’s role and board members’ roles. Most preferable factors are included.</p> <p>An awareness of the applicability of nonprofit law (pg. 22) and public meetings law is demonstrated (p. 104).</p> <p>The Application could be strengthened by the inclusion of a Treasurer with fiscal experience, as this can be a key determinant in successful fiscal management.</p> <p>The Application could be strengthened by providing a description of Board development activities and referencing agencies that can assist with Board development (i.e. OSBA).</p> <p>Note: The Applicant meets minimum expectations for governance structure, but does not meet the Preferable Factor of time, money and personnel for start-up, which is concerning. The proposed plan for opening lacks sufficient time for building renovations and staff recruitment and selection, and sufficient money to fund up to three months of salaries, building renovations, and the purchase of materials and furniture.</p> <p>Solid by-laws and starting policies described. Fall 2014 start time is aggressive but possible</p> <p>Roles are defined well in the application and bylaws. The application would be improved if a training plan for the board was</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>in place.</p> <p>The governance structure of the board is well laid out in the school’s bylaws and the school has already applied for their non-profit and tax-except status. There is some concern with the assumption that the board will also act as the administrator in the even that they don’t have one.</p>
<p>(g) The projected enrollment to be maintained and the ages or grades to be served</p>	<p>Enrollment and ages/grades served is evidenced by a clear description of anticipated enrollment (by age/grade) for at least three years (and for the duration of the desired charter term, if longer than three years).</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>A complete description of the student population the school intends to serve</i> • <i>Evidence of strong support from an adequate number of parents, or community members, or any combination thereof</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>This section meets criteria.</p> <p>Projected enrollment of 60 Grades 1-3 students in year one and 90 students in years two and three is well documented.</p> <p>Only saw plan and related budget for first two years, not three. However, they anticipate being at their final size, and therefore, final budget, at year two</p> <p>This 1-3rd grade and ELL</p> <p>The school intends to enroll students in grades 1 to 3 with 60 students enrolled in the first year and 90 in each successive year</p>
<p>(h) The target population of students the public charter school will be designed to serve</p>	<p>The target population to be served is evidenced by a description of student demographics and characteristics.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Evidence that founders understand key student populations and demographics within the district which are likely to influence the proposed school’s student body and needs</i> • <i>Evidence of targeted student’s current levels of achievement and instructional needs</i> • <i>Evidence of a need in the community to serve the target student population</i> • <i>Evidence of sufficient interest in the school to fill the proposed number of student openings</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p> <input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>Applicant notes that it intends to conduct outreach specifically to “low-income, and Hispanic students” (p. 29). However, while the target population of students is described, there is nothing in the application that includes the development of a culturally responsive curriculum.</p> <p>Evidence of sufficient interest is documented, with 57 parent signatures and mention of several Montessori preschools in Salem to draw from.</p> <p>Some evidence is provided of an understanding of target populations and their needs, and partners who can assist in recruitment (p. 29).</p> <p>The Applicant proposes to serve ELL students yet plans to locate in inner-city Salem, where it is unlikely that low income, Hispanic, and farmworker children (p. 43) are located, and does not address the question of transporting students. Given that transportation to a choice school is an equity issue, the Application would be strengthened by addressing this disconnect.</p> <p>Did not see any description of the demographics of the SKSD which they hope to serve.</p> <p>Prepared to receive ELL students, plan for working with TAG, ELL 504 and Sped. Targeting existing Montessori and low SES families.</p> <p>The school intends to target low income and ESOL students and has held meetings and made materials/surveys available in both English and Spanish to further this goal. Preliminary survey results suggest that there is interest in the school although the applicant only provided data in percentages and did not mention how many people actually participated in the survey.</p>
<p>(i) A description of any distinctive learning or teaching techniques to be used in the public charter school</p>	<p>Distinctive learning and teaching techniques are evidenced by a detailed description of educational model(s), activities, and/or delivery strategies that will characterize the school.</p> <p><i>Preferable factors</i></p> <ul style="list-style-type: none"> • <i>Clear, focused and compelling</i> • <i>Likely to improve educational outcomes</i> • <i>Expresses a clear, guiding purpose aligned with the mission and vision</i> • <i>Supported by research, applicant experience, and/or sound reasoning behind techniques</i>

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	<p> <input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>This section meets criteria. Distinctive learning and teaching techniques are well-described and Montessori methods are detailed. Most preferable factors are evident, as well.</p> <p>Learning and teaching techniques and delivery strategies are well defined, aligned with the mission and state standards, and supported by references to research (p. 9-21, Documents showing Math and LA state standards crosswalked to Montessori materials and activities, and Common Core Standards: An Opportunity for Montessori to Shine).</p> <p>Clear descriptions of Montessori philosophy and methods. Well-articulated in several places throughout the original application and the appeal</p> <p>The applicant clearly details the many positive aspects of a Montessori curriculum and learning style. The approach to education is unique for the district and likely to improve the educational outcomes of the students that the school recruits.</p>
<p>(j) The legal address, facilities and physical location of the public charter school, if known</p>	<p>School’s address, if known, and legal/ mailing address.</p> <p><i>Preferable factors</i></p> <p><i>If a facility has been identified:</i></p> <ul style="list-style-type: none"> • <i>Designation of the proposed facility</i> • <i>Evidence the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment</i> • <i>Adequate reflection of the costs associated with the proposed facility in the budget, including rent, utilities, and maintenance</i> • <i>Assurance the proposed facility will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA)</i> • <i>Sound plan to identify needed renovation as well as the funds and timeline for the completion of those renovations</i> <p><i>If a facility has not yet been identified:</i></p> <ul style="list-style-type: none"> • <i>Description of anticipated facilities needs including evidence the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment</i> • <i>Inclusion of costs associated with the anticipated facilities</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p><i>needs in the budget, including permits, rent, utilities, and maintenance</i></p> <ul style="list-style-type: none"> • <i>Evidence to indicate facilities-related budget assumptions are realistic based on anticipated location, size, etc</i> • <i>Assurance the proposed location will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA)</i> • <i>Plan for finding a location, including a proposed schedule for doing so</i> <p><input type="checkbox"/> 2 Meets <input checked="" type="checkbox"/> 3 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>The space and access needs of the school space are well-described.</p> <p>Budget (December 2013 Budget for State) reflects projected rent at \$2083/month. This seems low for the region. At an estimated market commercial rate of \$1.50/sq ft/mo, for 4600 sq ft (estimated from pg. 30) the monthly rate would be \$6,900. These are estimates; actual space availability and rates are undeterminable, but the size of the discrepancy is cause for concern and follow-up.</p> <p>Applicant has not provided evidence of an available and affordable facility, nor provided an analysis of available properties and whether they would be appropriate for the educational program. This is concerning given the targeted start date of September, 2014.</p> <p>The Application would be strengthened by a description of a known space and potential lease agreement, or demonstrated knowledge of available suitable properties in inner-city Salem.</p> <p>Primary concern here is the inadequate budget for the facility rent and for needed upgrades for permit compliance.</p> <p>Planning to look at property in the downtown area of Salem with several low SES students. Nervous that the budget doesn't include much retro fitting in the budget.</p> <p>The applicant does not have space chosen and does not plan to secure a space until June 15th of this year and plans to have it up to code by August 1st. The applicant has only budgeted \$3,500 for these renovations which is not realistic unless the space is currently being used as a public school which there is no mention of. I do not feel they have allotted sufficient time or funds for this endeavor and since most of their contingency will likely be used to cover the extra 5% they requested from the district in their ADMW estimates and are not guaranteed to receive, this could</p>

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	<p>leave them in a very difficult position.</p>
<p>(k) A description of admission policies and application procedures</p>	<p>The admission policies and application procedures, including lottery procedures are evidenced by specific descriptions aligned with ORS Chapter 338.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Clear description of the enrollment policy, including lottery procedures consistent with the requirements of ORS 338.125</i> • <i>Clear procedures for withdrawals and transfers from the school that will support an orderly transition for exiting students or a clear plan for developing such procedures</i> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>This section meets criteria.</p> <p>The Application would be strengthened by providing a specific number of students that will be exempt from the lottery if the founder and employee child waiver request is granted, in order to establish the limit of students that can be exempted (p. 28). Current language says “limited percentage”.</p> <p>Admissions policy (p. 134) may be in violation of a student’s right to deny IDEA services and attend the school of choice, if selected in the lottery and space permitting. The Application would be strengthened by keeping lottery placement and IDEA decisions separate.</p> <p>No transfer process is provided.</p> <p>Clear description, but not complying with State law. For instance, they wish to allow founder and staff children in before lottery (would require a waiver) and they wish to admit all siblings if one sibling gets in (would also require a waiver). Both of these waiver request have precedence, but are not guaranteed.</p> <p>Found it interesting that those on the planning team were asking for a guaranteed spot in the school. Although this practice may not be out of the ordinary, it is the first time I have seen it formally addressed.</p> <p>The lottery procedure is detailed in the school handbook. One area to define better is the exact number of staff and board member children that would make up the “small percentage” of students seeking a waiver from the lottery.</p>
<p>(L) The statutes and rules that shall apply to the public</p>	<p>Statutes and Rules that apply to the school are evidenced through an encompassing written statement of compliance with</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
<p>charter school</p>	<p>all laws listed as applicable to charter schools in ORS 338.115(1).</p> <p>Preferable factors</p> <ul style="list-style-type: none"> <i>Citation of any statutes or rules in addition to those listed in ORS 338.115 (1) and copies of policies or a timeline for policy development</i> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>While the applicant has copied the applicable statutes and rules directly from the charter school statute, there is no encompassing statement of compliance.</p> <p>An encompassing list of applicable statutes is provided; however, the Application would be strengthened by a providing a plan for policy development that would support the school in meeting all statutory requirements (i.e. OSBA’s policy services).</p> <p>The school lists the appropriate statutes and rules for a charter school and plans to adopt many of the district’s policies as well.</p>
<p>(m) The proposed budget and financial plan for the public charter school and evidence that the proposed budget and financial plan for the public charter school are financially sound</p>	<p>Demonstration of a sound budget and financial plan is evidenced by documentation of a detailed three-five year budget, accurate projection of revenues and expenditures based on prevailing costs and other factors that contribute to solvency.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> <i>Budget assumptions and financial planning based on realistic revenue and expenditure projections for the term of the contract, including based on minimum enrollment needed for solvency</i> <i>Spending priorities aligned with the school’s mission, curriculum, and plans for management, professional development, and growth</i> <i>Realistic cash flow projection for the first year of operation, including a plan for funding cash flow shortfalls</i> <i>Sound financial management systems</i> <i>Plan for making required school and employee contributions to PERS</i> <i>Adequate and reasonable plan to manage start-up costs</i> <i>Description of how the school will conduct an annual audit of the financial operations</i> <p><input type="checkbox"/> 1 Meets <input checked="" type="checkbox"/> 4 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>The financial plan for the school is detailed and thorough. Spending priorities align with the school’s mission and curriculum. Sound financial management systems are evident.</p> <p>However, the original budget included revenue from the Federal Charter School Grant, which should not have been assumed since it had not been received. The revised budget eliminated this assumption, but partially replaced it with an assumption of \$10K in donations the first year, and \$15K the second year, without evidence of the feasibility of attaining these donations. The budget only includes the first two years of operation. Classroom supplies appear to be under-budgeted. The budget does not include assumptions or explanations of the FTE associated. For instance, how many teachers will this budget line item pay for? How much FTE for janitorial staff? How many computers? What marketing efforts are being bought for \$8K? This makes it difficult to determine the feasibility of the budget. How is rent established? Is this amount for a year? \$500 misc seems low and is unspecific. Is it certain that \$50K in building renovations are required? Why was this dropped to \$3500 in the revised budget? How have they determined utilities? While the financial plan seems sound, the budget does not, as it is predicated on assumptions that are not explained and that have been drastically increased and reduced between the first and second versions of the budget.</p> <p>The Federal Charter School Grant is not expected to be received until September 27 (Outline of how we proposed to open in September 2014), yet the Bridge Loan of \$60,000 is insufficient to cover the startup costs identified in the Budget for year one, i.e. salaries for summer to October, renovations, furniture, and materials (December 2013 Budget for State).</p> <p>The budget provided is only for two years (December 2013 Budget for State, Appendix E ps 91-93).</p> <p>The Budget (December 2013 Budget for State, ps 91-93) indicates insufficient funds to pay a Business Manager for needed services (\$7,500). At an hourly rate of \$25, this would enable 6 hours/week for all budget preparation, payroll, reporting, and accounting. This seems unreasonable. The Application would be strengthened by increasing the budget for financial services.</p> <p>Administrator projected salary of \$35,000 seems unreasonably low and is less than teacher salaries of \$40,000. The Application would be strengthened by a higher administrative salary or evidence that a candidate has been secured at that salary level.</p> <p>Substitute pay should increase for year two with the addition of</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>one teacher.</p> <p>The Application references a Montessori consultant for the development of PD and teacher evaluation (p. 33), yet this position is not reflected in the budget.</p> <p>Did not provide a 3-5 year budget (may have not been required by SKSD). However, they reach their maximum size in year two. Again, their funds for facility rent and upgrades seem insufficient. Also, federal grant funds are a concern, but I am unsure if this should prevent their charter as SKSD maintains.</p> <p>The revised budget eliminated the dependence on grant money for running the school, but it added the assumption that 90% of the ADM would be going to the school. It is a bare bones budget. Several budgets have been submitted by the school but none of them seem adequate to cover the school’s needs. ADMW estimates are higher than the district is required to provide and the budget relies on soft funds in the form of “contributions”. There is also less than a 10% contingency fund and no annual carry-over of funds. Notably no budget items exist for the school lunch program and related supplies that they plan to implement, transportation costs, any specialists including music, physical education, counseling services, nursing or even office staff. Although some of this can be done by teachers it is probably not realistic to think that the teaching staff can cover all of these needs while addressing the needs of 30 students in a blended class covering three grades. Funding for the administrator also appears to be for part-time help since it is funded below the level of teacher salaries yet most of the responsibilities for the operation of the school as well as providing services to students and parents appear to fall under this position. Annual board training is also low at only \$250 annually despite their rather major role in governing the school. Renovations are also quite low with only \$3,500 budgeted in the category. Overall school funding seems inadequate.</p>
<p>(n) A description of the financial management system for the public charter school, an explanation of how the financial management system will meet the requirements of ORS 338.095 (1) and a plan for having the financial management system in place at the time the school begins operating;</p>	<p>The financial management systems are evidenced by documentation of board and staff management responsibilities, fiscal policies, budget development and oversight system, creating and using budgets, balance sheets reflecting assets, expenditures and liabilities, accounting systems, payroll, insurance and benefits, financial reporting, internal controls (staffing policies and procedures), the audit (understanding, conducting and preparing for an audit and using 990s.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Clear description of the financial responsibilities of the</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p><i>charter board as it compares to the staff responsibilities</i></p> <ul style="list-style-type: none"> • <i>A check and balance system described for budget development and the oversight system during the budget year</i> • <i>Board policies describing the internal controls for receiving revenue and paying bills</i> • <i>Clear operating standards for financial management with a consistent foundation, institutionalized practice in the event of leadership or staff turnover</i> • <i>Processes reflecting annual review of such systems by both the public charter school and sponsor</i> <p> <input checked="" type="checkbox"/> 3 Meets <input type="checkbox"/> 2 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>The financial plan for the school is detailed and thorough. Spending priorities align with the school’s mission and curriculum. Sound financial management systems are evident. This section includes preferable factors.</p> <p>The Applicant demonstrates an understanding of fiscal oversight, budget development, and payroll, annual review, and audit needs, and has provided appropriate fiscal policies that establish a healthy foundation in the event of leadership turnover (ps. 75-87).</p> <p>The Fiscal Calendar demonstrates adequate reporting schedule, payroll and tax accounting, and audit and budget preparation (ps. 88-90).</p> <p>The Applicant has secured an experienced charter school accountant (p. 8).</p> <p>Details of the internal procedures for money handling and internal controls seemed minimal or non-existent.</p> <p>Appendix materials discuss each aspect of this requirement</p> <p>There is some description of how conflicts of interest will be addressed and some mention of fiscal policies but it was unclear who would have the responsibility of creating the annual budget and handling the bookkeeping for the school. Payroll services are included in the budget in the amount of \$7500 annually which is not sufficient to cover the expense of a bookkeeper. Additionally an annual audit is to be performed but this budget category dropped from \$6,500 to \$3,000 in the final budget with no explanation for how the service would be provided at the lower funding level. A detailed financial calendar is provided but there is no mention of who is responsible for providing the services.</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
<p>(o) The standards for behavior and the procedures for the discipline, suspension or expulsion of students</p>	<p>Clear description of standards for student behavior and accompanying discipline procedures, which include suspension and expulsion procedures.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Policies for addressing expulsion, suspension and education of expelled or suspended students providing adequate safety of students and staff; provide due process for students; serve the best interest of the school’s students; create a positive environment for learning</i> <p>OR</p> <ul style="list-style-type: none"> • <i>A description of student standards for behavior</i> • <i>A clear plan for developing such policies including a schedule for doing so</i> • <i>An explanation of how the proposed school will conduct appeals for students facing expulsion</i> • <i>A description of how students will be expelled, for what offenses and which schools they will be expelled from if the expulsion hearing is conducted by the proposed charter school</i> <p><input checked="" type="checkbox"/> 3 Meets <input type="checkbox"/> 2 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>Applicant explains the path to “consequences” but does not discuss what those consequences could be. While some of the preferable factors (including policies for suspension and expulsion) are met, the basic requirements of this question are not. The parent handbook provides more information on the “levels” of discipline, but does not include the behaviors that might initiate a discipline response.</p> <p>Suspension and expulsion procedures lack specificity and are inadequate (ps. 26-27, 127-129). Discipline procedures as described do not provide a progressive plan of discipline, nor describe student behavior standards and consequences to an adequate level of specify.</p> <p>The Applicant states that the Salem/Keizer district suspension and expulsion policies will be adopted. It is highly likely that the SK discipline procedures are not in alignment with the philosophical approach to student discipline described in the Application (i.e. use of “freedom within limits”, and adaptation of the environment to correct the behavior).</p> <p>The Application would be strengthened by a detailed progressive discipline plan and chart of behaviors and consequences that is</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>in alignment with the Montessori approach to behavior management, or a plan for developing such policies.</p> <p>Policies described comply with state law and Montessori philosophies.</p> <p>Handbook included and contains all the necessary required elements for Oregon.</p> <p>The applicant clearly defines their behavioral expectation of students and has already compiled a student and parent handbook. They also plan to adopt many of the districts policies regarding student discipline, suspension and expulsion.</p>
<p>(p) The proposed school calendar for the public charter school including length of school day and school year</p>	<p>The school calendar is evidenced by a description or calendaring of school days; the length of the school year and the length of a school day that meet the instructional time requirements in OAR 581-022-1620.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>School day and school calendar are structured in ways that align with the educational program</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> This section meets criteria.</p> <p>The Applicant demonstrates an understanding of instructional hours required and an intention to closely follow the SK calendar.</p> <p>Assuming that SKSD has sufficient days in their calendar, SMS's assertion that is will follow their calendar, combined with SMS's daily schedule, assures adequate instructional time.</p> <p>Follows SKSD calendar. Hours listed</p> <p>The school plans to mirror the district's calendar and provides information on a school day with sufficient learning hours for students.</p>
<p>(q) A description of the proposed staff members and required qualifications of teachers at the public charter school</p>	<p>All proposed staff positions and qualifications are described.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Explanation of the relationship that will exist between the charter school and its employees</i> • <i>Employment policies of the school OR clear plan for timely development of such policies</i> • <i>Plans for ensuring all staff meet ESEA Highly Qualified Teachers requirements</i> • <i>Staffing plan that clearly describes qualification, roles and</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p><i>responsibilities of each staff member, including school administrator</i></p> <ul style="list-style-type: none"> • <i>Description of ongoing professional development for staff, aligned to school’s mission</i> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> This section meets criteria. Proposed staff positions and qualifications are adequately described. No employment policies evidenced, nor a plan for development of such policies. This is of concern given the September, 2014 start date. The Application would be strengthened by stating the projected hours per day of the Administrator (p. 33). If the projection is less than full time, this would be cause for concern as student discipline and emergency needs likely require full time presence of non-classroom dedicated staff. Designated employer is identified (p. 48), but not the contractual relationship. Professional development is adequately described (p. 50). The Applicant proposes to hire teachers that are Montessori certified, state certified, and ESOL endorsed or in process (pg. 32). This seems unrealistic. The Application would be strengthened by a more realistic description of staff recruitment expectations, or evidence that such candidates are already known and committed. This was a weaker area with less of the preferable factors present. The applicant states that it will hire only Highly Qualified Teachers and provide evidence of appropriate hiring to the district. Further detail would be helpful in detailing the actual roles of each staff member. Professional development is outlined in the application with time lines given.</p>
<p>(r) The date upon which the public charter school would begin operating</p>	<p>The operational date is evidenced by a clear statement of projected start date.</p> <p><i>Preferable factors</i></p> <ul style="list-style-type: none"> • <i>A description of the process for opening the school on the projected start date</i> • <i>A timeline outlining the significant items needed to open the school by the projected date.</i>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p> <input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet </p> <p><u>Explain rationale for rating:</u> This section meets criteria.</p> <p>Start date and the process for opening are adequately identified in “Outline of how we proposed to open in September 2014”.</p> <p>Federal Charter School Grant is not received (if granted) until September 27. This is of concern in that the proposed bridge loan amount does not seem adequate to pay Administrator and Business Manager/Payroll salaries and start-up costs.</p> <p>Note: The Applicant meets minimum expectations for a clear date upon which the school would begin operating, but does not adequately provide for the time, money and personnel for start-up, which is concerning. The proposed plan for opening lacks sufficient time for building renovations and staff recruitment and selection, and sufficient money to fund salaries for summer to October, building renovations, and the purchase of materials and furniture.</p> <p>Aggressive but possible if a suitable facility is found.</p> <p>In appeals letter to ODE</p> <p>The projected start date is the day after Labor Day, 2014 mirroring the district’s start date.</p>
<p>(s) The arrangements for any necessary special education and related services provided pursuant to ORS 338.165 for children with disabilities who may attend the public charter school</p>	<p>The arrangements for special education and related services are evidenced in a comprehensive description which aligns with ORS 338.165.</p> <p><i>Preferable factors</i></p> <ul style="list-style-type: none"> • <i>Realistic plan to identify and meet the general education learning needs of, resident and non-resident students with disabilities</i> • <i>Timeline, lead contact, and intervention process with specific action steps for meeting learning needs of students with suspected special needs</i> • <i>Plans for serving special populations align with the overall curriculum, instructional approaches, and the school mission</i> • <i>Plan for contracting with resident districts for providing Identification and IEP services for students with suspected or special needs.</i> <p> <input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>This section is well-described and contains most preferable factors. The applicant describes the relationship with the school district for providing services to students on IEPs, identifying students with special needs, and also how the Montessori model supports the general education of students with IEPs.</p> <p>The Applicant demonstrates excellent understanding of its responsibilities to support and integrate Special Education personnel and students, individualize instruction and provide accommodations, and identify students with suspected disabilities (ps. 34-39, 137-138).</p> <p>Admissions policy (p. 134) may be in violation of a student’s right to deny IDEA services and attend the school of choice, if selected in the lottery and space permitting. The Application would be strengthened by keeping lottery placement and IEP decisions separate.</p> <p>Plan and description seemed adequate.</p> <p>Well developed, included plan for child find and universal screening process, interventions and notification process.</p> <p>The applicant provides a flow chart and sufficient detail for how they will identify and meet the needs of students needing IEP services and how they will train teachers in this capacity.</p>
<p>(t) Information on the manner in which community groups may be involved in the planning and development process of the public charter school</p>	<p>Plans to involve the community in the planning and development of the public charter school are described in detail (e.g., identification of key community groups or members the developers will access given the school’s mission and target population, tactics to engage key community constituents, the process of how community input will be sought, etc.).</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • <i>Sound outreach plan to inform parent and members of the community about the operations of the school, including providing information about the school to students of all races, languages, and abilities, a timeline for implementation, a lead contact, and specific action steps</i> • <i>Evidence the proposed school is welcomed by the larger community, has formed partnerships with community organizations, and is viewed as an attractive educational alternative that reflects the community’s needs and interests</i> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>The applicant describes the activities of their founding body, and their plans to “seek assistance in making Sequoia Montessori</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>School accessible to the Hispanic community”. (p. 43). These connections to the targeted parent communities do not appear to have been formed yet, and the school apparently plans to do so through contractors and other agencies. The applicant does not describe how community input has been sought, or how it might be incorporated into the planning and development of the school.</p> <p>Handbook (pg. 104) informs parents how to be involved in school governance (i.e. Site Council, Parent Group).</p> <p>Community partners are identified (ps. 42,43).</p> <p>The Application would be strengthened by providing evidence of a communications plan which will engage the community on a long term basis, and a plan for engaging community constituents in the development of the school.</p> <p>Provided evidence of public meetings, surveys and specific recruiting partners.</p> <p>Strong support evident.</p> <p>The school has held community meetings and made materials in both English and Spanish to recruit students. The school has documented sufficient interest from parents and community members to open the school. The school is sufficiently small, with only 60 students enrolled in the first year that it should not be a challenge to fill their openings. The only challenge they may face is in enrolling third graders since they could only attend the school for one year and many parents look for more continuity in education.</p>
<p>(u) The term of the charter</p>	<p>The term of the charter is evidenced by a proposed beginning and ending date for the charter contract; proposed term must be a minimum of one year and maximum of five years.</p> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> This section meets criteria. Three year term established (p. 27 and 43). 3-year The charter is proposed for a three year term.</p>
<p>(v) The plan for performance bonding or insuring the public charter school, including buildings and liabilities</p>	<p>The insurance plan is evidenced through a description of the types and levels of insurance coverage the school plans to purchase or a description of the plan to secure performance bonding.</p> <p><i>Preferable factors</i></p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<ul style="list-style-type: none"> • <i>Budget reflects insurance costs</i> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale for rating:</u> This section meets criteria, though the level of insurance the school plans to purchase is not described. The Applicant commits to secure insurance necessary to meet state law and district requirements (p. 44). Addressed in budgets and narrative. Difficult to assess if amount is sufficient without knowing what facility will be. In the budget and explained in the original application The types of insurance that the school plans to acquire are given but not the levels of coverage so it is not possible to know if they are sufficient.</p>
<p>(w) A proposed plan for the placement of public charter school teachers, other school employees and students of the public charter school upon termination or non-renewal of a charter</p>	<p>The plan for placement of staff and students (in the event of non-renewal or termination) is evidenced through a written description of the process to be used; student plans should include collaboration with the local school district.</p> <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u> This section meets criteria. An adequate plan is described (ps. 48, 49). Minimal description, but present. A plan is provided to find placement for students and staff in the event of school closure.</p>
<p>(x) The manner in which the program review and fiscal audit will be conducted</p>	<p>The plans for annual review of educational program and operations, and municipal fiscal audits will be evidenced in a detailed description of how both will be accomplished</p> <p><i>Preferable factors</i></p> <ul style="list-style-type: none"> • <i>The process and timeline for arranging the annual fiscal audit</i> • <i>The process and timeline for a sponsor site visit</i> • <i>The manner in which fiscal audit and program review results will be incorporated into school improvement planning</i> • <i>The plan and timeline to submit audit and annual program review to ODE</i> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p>

<p>Proposal Requirements ORS 338.045 (2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p><u>Explain rationale for rating:</u> Applicant provides its own annual program report template A plan for program review and fiscal audit is provided that demonstrates understanding of legal requirements. (ps. 44, 139). Evidence and description of fiscal audit was provided, but no description of program/operational review provided. A timeline is provided for how the annual audit will be performed and provided to the district and is appropriate. A sponsor site visit with appropriate documentation is also detailed. Additional details on how the results will be used for school improvement plan would be helpful and additional funding for this category may be necessary in the budget.</p>
<p>(y) In the case of an existing school being converted to charter status:</p> <p>(A) The alternative arrangements for students who choose not to attend the public charter school and for teachers and other school employees who choose not to participate in the public charter school; and</p> <p>(B) The relationship that will exist between the public charter school and its employees, including evidence that the terms and conditions of employment have been addressed with affected employees and their recognized representatives, if any.</p>	<p>(A) Alternative arrangements for staff or students who choose not to be in the public charter school is evidenced by a detailed plan that addresses the needs of each group and does not create an adverse impact or violate the rights of an individual.</p> <p><input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet</p> <p><u>Explain rationale for rating:</u> NA</p> <p>(B) Description of the relationship between the public charter school and its employees, should they choose to remain at the school once converted to charter, with evidence that all employment terms and conditions have been addressed.</p> <p><input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet</p> <p><u>Explain rationale for rating:</u> NA</p>

**Oregon State Board of Education
Charter School Proposal Review and Analysis Rubric**

<p align="center">Evaluation Criteria ORS 338.055(2)</p>	<p align="center">Evidence, Preferable Factors, Rating and Rationale</p>
<p>(a) The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members, including comments received at the public hearing held under subsection (1) of this section</p>	<p>Demonstration of sustainable support is evidenced by substantial documentation, e.g., market research, marketing plans, results of community meetings/presentations, community partnerships, and/or survey results, as well as documentation of community testimony provided during the public hearing conducted by the school district.</p> <p align="center"> <input checked="" type="checkbox"/> 3 Meets <input type="checkbox"/> 2 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>Applicant presented a short survey and a small number of people who came to their hosted community information sessions. The applicant does not provide a compelling case for demand for the program in the district. The applicant does not include a marketing plan, a list of community partnerships, documentation of public testimony, or other kinds of evidence that would demonstrate a strong desire for this program in the district. In its revised application, the applicant included a “supporters list”, but did not describe how the named individuals would support the school.</p> <p>The Applicant demonstrates sustainable community support (ps. 15-16, 45-47).</p> <p>The Applicant identifies sufficient community partners and outreach efforts (p. 43).</p> <p>No comments from public hearing provided. In general, their public support seemed a bit weak and limited. Attendance at early public meetings (6 months apart) were less than 100 at each meeting.</p> <p>Lists provided, reports of survey’s etc...</p> <p>The school has held community meetings and provided evidence from surveys that the school is well received and supported in the community. Members of the board and public also spoke in support of the school at the public hearing. The school’s small size also makes it likely that they will have ample support to meet their enrollment needs.</p>
<p>(b) The demonstrated financial stability of the public charter school, including the demonstrated ability of the</p>	<p>Demonstration of a fiscal stability is evidenced by documentation of a detailed three-five year budget, balance sheets reflecting assets, expenditures and liabilities, accurate projections of revenues and expenditures based on prevailing costs and other</p>

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
<p>school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1);</p>	<p>factors that contribute to solvency, as well as GAAP and other sound fiscal management practices.</p> <p><i>Preferable factors</i></p> <ul style="list-style-type: none"> • Annual reserve, minimal reliance on soft funds • Sound financial management policies and strategies including but not limited to cash management, investment practices, financial reporting, segregation of duties, and processes reflecting annual review of such systems. <p><input type="checkbox"/> 1 Meets <input checked="" type="checkbox"/> 4 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>The financial plan for the school is detailed and thorough. Spending priorities align with the school’s mission and curriculum. Sound financial management systems are evident.</p> <p>However, the original budget included revenue from the Federal Charter School Grant, which should not have been assumed since it had not been received. The revised budget eliminated this assumption, but partially replaced it with an assumption of \$10K in donations the first year, and \$15K the second year, without evidence of the feasibility of attaining these donations. The budget only includes the first two years of operation. Classroom supplies appear to be under-budgeted. The budget does not include assumptions or explanations of the FTE associated. For instance, how many teachers will this budget line item pay for? How much FTE for janitorial staff? How many computers? What marketing efforts are being bought for \$8K? This makes it difficult to determine the feasibility of the budget. How is rent established? Is this amount for a year? \$500 misc seems low and is unspecific. Is it certain that \$50K in building renovations are required? Why was this dropped to \$3500 in the revised budget? How have they determined utilities? While the financial plan seems sound, the budget does not, as it is predicated on assumptions that are not explained and that have been drastically increased and reduced between the first and second versions of the budget.</p> <p>Sound fiscal management practices are demonstrated (ps. 75-90).</p> <p>The Budget only reflects two years and lacks funds to cover startup costs until the Federal Charter School Grant funds become available. Bridge Loan is insufficient for the startup costs</p>

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>projected in the budget.</p> <p>Salaries for Director and necessary business services seem unsustainable (ps 91-93).</p> <p>Again, unsure of whether their need for federal funds should stop their charter as SKSD contends. However, their budget in the facility rent/upgrades seems insufficient.</p> <p>Despite dependence on a 90% pass-through, the budget for the first 2 years of the school has been provided. GAAP and ORS requirements are met</p> <p>Several budgets have been submitted by the school but none of them seem adequate to cover the school’s needs. ADMW estimates are higher than the district is required to provide and the budget relies on soft funds in the form of “contributions”. There is also less than a 10% contingency fund and no annual carry-over of funds. Notably no budget items exist for the school lunch program and related supplies that they plan to implement, transportation costs, any specialists including music, physical education, counseling services, nursing or even office staff. Although some of this can be done by teachers it is probably not realistic to think that the teaching staff can cover all of these needs while addressing the needs of 30 students in a blended class covering three grades. Funding for the administrator also appears to be for part-time help since it is funded below the level of teacher salaries yet most of the responsibilities for the operation of the school as well as providing services to students and parents appear to fall under this position. Annual board training is also low at only \$250 annually despite their rather major role in governing the school. Renovations are also quite low with only \$3,500 budgeted in the category. Overall school funding seems inadequate.</p> <p>Additionally, it is not clear who is responsible for creating the annual budget or providing bookkeeping for the school.</p>
<p>(c) The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal</p>	<p>Evidence of the applicant’s capacity to support, plan and provide comprehensive instructional programs, including relevant expertise and experience of the applicant, a proposed comprehensive curriculum aligned with state standards and based on research-based instructional practices, adaptable for all achievement levels.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> • Effective staffing, professional development

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<ul style="list-style-type: none"> • Assessment plans that support effective delivery and measurement of the instructional program. <p> <input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>The applicant appears to have thorough knowledge of the Montessori method and access to the relevant curriculum and materials. Applicant provided a detailed alignment to standards.</p> <p>The Applicant demonstrates the capacity to provide a comprehensive instructional program, with sufficient staffing and identification of adequate internal and external success metrics.</p> <p>Plan is sufficient.</p> <p>Not sure how long it would take to locate a Montessori trained teacher with Oregon License. Subscriptions to the Montessori training programs are included in the budget. Hire only those with ELL endorsement (training required prior to licensure).</p> <p>The applicant is well-versed in the Montessori curriculum and has provided an alignment of their curriculum at all grade levels to state standards. They plan to continue this work in light of the new Common Core Standards and given the alignments already submitted this should be within the applicant’s capability. The blended classrooms also provide learning opportunities for students at all achievement levels. Further assessment of incoming students and summative assessments that allow comparison with district students in first and second grade are needed.</p>
<p>(d) The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low achieving</p>	<p>Evidence of the applicant’s capability to support, plan, and provide comprehensive instructional programs that will meet the needs of academically low achieving students is evidenced by a plan for identifying low achieving students, specific program planning/ implementation to close anticipated achievement gaps and assessment plans to measure individual progress.</p> <p> <input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet </p> <p><u>Explain rationale for rating:</u></p> <p>The applicant does not sufficiently address providing support to students identified as academically low-achieving. Additionally, the applicant does not discuss its plans or strategies to close racial and other achievement gaps. In fact, the applicant identifies</p>

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>its target population of students as being low-income students and/or ELL students; however, it does not describe the creation of culturally relevant curriculum, plans to promote racial equity in instruction and assessment, or methods to provide an inclusive atmosphere to families and students of all racial, cultural, and ethnic backgrounds.</p> <p>The Applicant demonstrates sufficient knowledge of the needs of ELL students and plans for assessment and interventions (ps. 17-22, 43).</p> <p>The Applicant proposes to serve ELL students yet plans to locate in inner-city Salem, where it is unlikely that low income, Hispanic, and farmworker children (p. 43) are located, and does not address the question of transporting students. Given that transportation to a choice school is an equity issue, the Application would be strengthened by addressing this disconnect.</p> <p>The Applicant provides adequate description of supports available for low achieving students (ps. 17-22, 40, 51, 52, 56).</p> <p>The Application would be strengthened by providing a list of the formative assessments to be utilized (p. 51).</p> <p>Plan is sufficient.</p> <p>The applicant plans to have very flexible classroom and learning spaces that should allow academically low achieving students to achieve when combined with the one-on-one help that they outline for struggling students.</p>
<p>(e) The extent to which the proposal addresses the information required in ORS 338.045</p>	<p>Evidence that the proposal addresses the information required in ORS 338.045 to a satisfactory extent.</p> <p><input type="checkbox"/> 2 Meets <input checked="" type="checkbox"/> 3 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>See above for comments on other sections of the application.</p> <p>Applicant does not sufficiently address transportation requirements, but instead says that it will “work with the district to provide adequate and safe transportation from the nearest public school”. This may indicate a lack of understanding of the obligation of charter schools to ensure that transportation is not a barrier to student enrollment.</p> <p>The Applicant does not provide a financially sound budget, as required in ORS 338.045(2)(m).</p> <p>Satisfactory.</p>

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
	<p>There is not significant evidence that the proposal is lacking sufficiently in any one area to cause concern.</p> <p>The school has not provided a sound three to five year budget, adequate description of staff responsibilities or measurable student outcomes for grades one and two.</p>
<p>(f) Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located</p>	<p>Evidence from the proposal demonstrates the value of the public charter school.</p> <p>Evidence from the school district response demonstrates an explicitly identifiable, significant and adverse impact on the quality of education of students within the district.</p> <p><i>(A "Meets" score signifies there is NO adverse impact)</i></p> <p><input checked="" type="checkbox"/> 4 Meets <input type="checkbox"/> 1 Does Not Meet</p> <p><u>Explain rationale of rating:</u></p> <p>Value-</p> <p>More info is required to make this determination. However, given the small size of the proposed school in the context of the size of the district, it is unlikely that there would be a significant adverse impact on the education of students in the district.</p> <p>The value of the proposed charter school is demonstrated by the evidence of support in the community and the existence of Montessori preschools from which to draw students. The district provides no evidence of adverse impact.</p> <p>SMS describes adequately the value of public Montessori schools.</p> <p>No public school in SK offers the Montessori based education, one that uses constructivist based, individualized student learning systems to master skills for early learning in grades 1st-3rd</p> <p>Adverse Impact-</p> <p>SKSD does not claim, nor provide any evidence of, adverse impact.</p> <p>None evident</p> <p>The applicant has not demonstrated that the school will be fiscally sound and therefore may result in school closure and the necessary placement of students in other educational settings.</p>

<p>Evaluation Criteria ORS 338.055(2)</p>	<p>Evidence, Preferable Factors, Rating and Rationale</p>
<p>(g) Whether there are arrangements for any necessary special education and related services for children with disabilities pursuant to ORS 338.165</p>	<p>Evidence of arrangements for necessary special education and related services for children with disabilities include detailed plans aligned with ORS 338.165, i.e., recognition that student resident districts to retain responsibility for providing all special education and related services, plans for charter school to contract with sponsor district and other districts for payment of ADMw for special education students and specifying respective responsibilities related to the provision of special education and related services to the student.</p> <p>Preferable factors</p> <ul style="list-style-type: none"> Professional development for charter school staff related to identification and referral, modifications and accommodations, discipline, attendance reporting, communication with parents, and charter school’s role on IEP team. <p><input checked="" type="checkbox"/> 5 Meets <input type="checkbox"/> 0 Does Not Meet</p> <p><u>Explain rationale for rating:</u></p> <p>This section is well-described. The applicant describes the relationship with the school district for providing services to students on IEPs, identifying students with special needs, and also how the Montessori model supports the general education of students with IEPs.</p> <p>The Applicant demonstrates a thorough understanding of the division of responsibilities between the charter and the sponsor as relates to the provision of Special Education services (ps. 34-39, 137-138).</p> <p>Plan is sufficient.</p> <p>Documented conversations with districts liaison for Charter Schools and for Special Programs. Well-articulated processes for meeting IEP obligations including Child Find</p> <p>The applicant provides a flow chart and sufficient detail for how they will identify and meet the needs of students needing IEP services and how they will train teachers in this capacity.</p>
<p>(h) Whether there are alternative arrangements for students and for teachers and other school employees who choose not to attend or who choose not to be</p>	<p><i>Applicable to conversion schools only</i></p> <p><i>Alternative arrangements for staff or students who choose not to be in the public charter school is evidenced by a detailed plan that addresses the needs of each group and does not create an adverse impact or violate the rights of an individual.</i></p>

Evaluation Criteria ORS 338.055(2)	Evidence, Preferable Factors, Rating and Rationale
employed by the public charter school	<p> <input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet </p> <p> <u>Explain rationale for rating:</u> </p> <p> NA </p>