



To: Members of the Board of Education

From: Jennifer Cheatham

Date: March 20, 2014

Subject: Isthmus Montessori Planning Grant Application

We are writing to provide the Board with a recommendation regarding the charter school planning grant application the district received from Isthmus Montessori Academy. The district received the application on February 13, and the Board will discuss and vote on whether to approve the application at the regular meeting on March 31. A planning grant provides funding from DPI to further develop a charter proposal that would come to the Board.

As you know, we have worked hard to stay incredibly focused on the work of our strategic framework this year. Our vision is that every school will be a thriving school that prepares every student for college, career and community. We know that to be successful in closing opportunity gaps and making that vision a reality, we must stay incredibly focused on the day-to-day work of great teaching and learning for every child. We are only in the first year of our strategic framework, but we believe we are making exciting progress.

While we are busy working in the present day on the improvement of all of our schools, a key aspect of our long-term strategy must include the addition or integration of unique programs or school models that meet identified needs. However, to ensure that these options are strategic and that they enhance our focus rather than distract from it, we need to build a comprehensive and thoughtful strategy.

We need to think in depth about how options like additional district charter schools would meet the needs of our students, how they would support our vision and close opportunity gaps for all. The things we are learning now from our high school reform collaborative, which was just launched, and the review of our special education and alternative programs, which is now in progress, will be powerful information to help build that strategy over the coming school year.

Until we establish that more comprehensive long-term strategy, together with the Board and with direction and input from our educators and families, we don't believe now is the time to move individual proposals forward. Both the district and those proposing a charter option should have the guidance of a larger strategy to ensure that any proposal would meet the needs of our students and accomplish our vision.



Wisconsin Department of Public Instruction
CHARTER SCHOOLS SUBGRANT APPLICATION
Public Law 107-110, Title V, Part B, Subpart 1
PI-9600-P (Rev. 01-14)

INSTRUCTIONS: Complete and return original and four (4)
copies by April 15, 2014, to:

DEPARTMENT OF PUBLIC INSTRUCTION
ATTN: SCOTT EAGLEBURGER
CHARTER SCHOOL TEAM
125 SOUTH WEBSTER STREET
P.O. BOX 7841
MADISON, WI 53707-7841

Planning Grant

I. GENERAL INFORMATION

1. School District/Chartering Authority Madison Metropolitan School District		2. Name of District Administrator Jennifer Cheatham	
3. School District/Chartering Authority Address <i>Street, City, State, ZIP</i> 545 West Dayton Street, Madison, WI 53703		4. CESA No. 2	5. LEA Code 3269
6. District Administrator E-Mail Address jcheatham@madison.k12.wi.us		7. District Administrator Phone <i>Area/No.</i> 608-663-1607	
8. If Multi-District, list district names		9. Charter School Operated by CESA <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
10. Name of Charter School Isthmus Montessori Academy	11. Charter School Address <i>Street, City, State, ZIP</i> unknown		
12. Charter School Developer/Planning Committee Representative Isthmus Montessori Academy Inc.		13. Developer/Planning Committee Representative Phone <i>Area/No.</i> 608-661-8200	
14. Developer/Planning Committee Representative E-Mail Address administration@isthmusmontessoriacademy.org		15. Amount Requested \$150,000	

II. ASSURANCES

Each participating subgrant recipient does hereby agree to comply with the following assurances: *Read and check*

- ☒ 1. Subgrant funds will be expended during the specified subgrant period; the school district or chartering authority shall serve as the fiscal agent for all subgrants; standard accounting procedures will be utilized by subgrant recipients and records of all subgrant expenditures will be maintained in an accurate, thorough, and complete manner. Any administrative fees or expenses reserved from the subgrant are prohibited unless agreed to by the chartering authority and subgrantee as noted in section 5204(f) (4) (B) of the ESEA Part B Public Charter Schools.
- ☒ 2. Subgrant recipients/chartering authorities by endorsement of this proposal, assure that an application to develop and operate a charter school has been submitted to the authorizer. Both parties assure the application for federal charter school funds has been submitted to the authorizer in an adequate and timely manner.
- ☒ 3. Subgrant recipients will participate in all data reporting and evaluation activities or on-site monitoring as requested by the U.S. Department of Education and the Wisconsin Department of Public Instruction, including the School Performance Report, participation at a reporting conference, a final grant report document, and financial claim.
- ☒ 4. Subgrant recipients will expend planning funds only for the purpose of planning a charter school which is nonsectarian and which will be in compliance with all Wisconsin laws and administrative rules regarding staff certification and licensure.
- ☒ 5. Subgrant recipients will comply with all provisions of all applicable acts, regulations and federal laws including, but not limited by enumeration to, the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and part B of the Individuals With Disabilities Education Act, and all provisions of the Department of Education General Administrative Regulations (EDGAR), 34 CFR, Parts 76, 77, 80, 81, 85, 97, 98, and 99.
- ☒ 6. Subgrant recipients will comply with all provisions of the *Non-Regulatory Guidance—Public Charter Schools Program* of the United States Department of Education <http://www.ed.gov/policy/elsec/guid/cspguidance03.pdf>.
- ☒ 7. Subgrant recipients ensure that the charter school will receive funds through programs administered by the United States Department of Education under which funds are allocated on a formula basis. Each charter school will receive such funds for which it is eligible.

III. SIGNATURES

WE, THE UNDERSIGNED, CERTIFY that the information provided in the application is true and correct to the best of our knowledge.

Signature of District Administrator/Chartering Authority Official ➤	Date Signed <i>Mo./Day/Yr.</i>
Signature of Charter School Planning Committee Representative ➤ <i>Melissa M. Dwyer</i>	Date Signed <i>Mo./Day/Yr.</i> 2-13-2014

REQUIRED**IV. CERTIFICATION AND ENTITLEMENT****REQUIRED**

Agencies receiving funds under any of the grant programs must collect this certificate whenever they enter into a covered transaction with a grantee. (Refer to instructions for more information.)

Certification Regarding**Debarment, Suspension, Ineligibility, and Voluntary Exclusion****Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 34 CFR Part 85, Section 85.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, *Federal Register* (pages 19160-19211). Copies of the regulations may be obtained by contacting the person to whom this proposal is submitted.

1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

LEA / Agency /Company Name

Name and Title of Authorized Representative

Signature

➤

Date Signed Mo./Day/Yr.

INSTRUCTIONS FOR CERTIFICATION

1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion-Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Non-procurement List (202-786-0688).
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

V. CHARTER SCHOOL INFORMATION

1. Name of Charter School Isthmus Montessori Academy		2. Public School Conversion <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
3. Will your charter school be a virtual charter school as defined under Section 115.001(16), Wisconsin Statutes? A virtual charter school is a charter school under contract with a school board under s. 118.40 in which all or a portion of the instruction is provided through means of the internet, and the pupils enrolled in and instructional staff employed by the school are geographically remote from each other. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
4. Type of School <input checked="" type="checkbox"/> Instrumentality <input type="checkbox"/> Non-Instrumentality		5. Grade Level(s) to be Served by Charter School PreK-12	
		6. Projected Enrollment Upon Opening 131	
7. Primary Type of Students Served All student primary types		8. Primary Educational Model Montessori If Other, Specify	
		9. Curricular Priority Other If Other, Specify all except language immersion	
10. School Leadership Model See Instructions			
a. Will your charter school share space with another public school? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Unknown		b. Will your charter school be led by a principal? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown	
		c. Will your charter school be a teacher-led school? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Unknown	
11. Lead Teacher First & Last Name If known		12. Lead Teacher Email Address	
14. Secondary School Delivery Model See instructions Project Based Learning with student led projects If Other, Specify		15. Date Charter to be Granted Mo./Day/Yr. 2/2/2015	
		16. Date Charter School Will Open Mo./Day/Yr. 09/08/2015	
17. Charter School Administrator If known Melissa M. Droessler		18. Charter School Administrator Phone Area/No. 608-661-8200	
19. Charter School Administrator Email Address administration@isthmusmontessoriacademy.org			

VI. THE PLANNING PROCESS—RECORD OF ACTIVITIES

Provide details on planning activities to date.

Month/Year	Activities
August 2013	*Please see attached Planning Process section of the narrative portion.
September	
October	
November	
December	
January 2014	
February	
March	
April	

Outline remaining work that needs to be accomplished after April 2014 to open your school and begin serving children by fall 2015.

*Please see attached Planning Process section of the narrative portion.

VII-A. LOCAL PLAN FOR USE OF DISCRETIONARY FUNDS
See Completing the Application Narrative, VI. The Budget, item 2

Instruction	Amount	Explanation
Salaries and Fringe Benefits		
Purchased Services		
Coaches / Consultants	\$4,000	Montessori consultants , Montessori inservices and conferences
Others Specify		
Non-Capital Objects <i>Supplies and materials</i>	\$102,000	17,000 per classroom for 6 classrooms of Montessori materials
Capital Objects <i>Equipment</i>	\$48,000	classroom furniture 8,000 per classroom for 6 classrooms
TOTAL Instruction	\$154,000	
Support Services	Amount	Explanation
Salaries and Fringe Benefits <i>Subs, Extended contracts*</i>	\$1,000	Extended time/sub pay
Purchased Services	\$2,500	WMA consultant and AMI refresher course for Administration
Coaches / Consultants		
WISN or Other Network		
Other Specify	\$80,000	training and professional development
Non-Capital Objects <i>Supplies and materials</i>		
Capital Objects		
TOTAL Support Services	\$83,500	
Support—Administration	Amount	Explanation
Purchased Services		
Non-Capital Objects <i>Supplies and materials</i>		
Capital Objects		
TOTAL Support—Administration	\$0	
TOTAL BUDGET Phase I and Phase II	\$237,500	

* Applies to payments for additional time beyond contract. Cross reference with five-year budget worksheet A, line 3.

VII-B. BUDGET SUMMARY—PHASE I

Authorizer Madison Metropolitan School District	Charter School Name Isthmus Montessori Academy	Grant Period Begin August 1, 2014	End July 31, 2015	Project Number For DPI Use Only
WUFAR Function	WUFAR Object	Phase I Amount		Phase II
Instruction (100 000 Series) Activities dealing directly with the interaction between instructional staff and students.	a. Salaries (100s)			
	b. Fringe Benefits (200s)			
	c. Purchased Services (300s)			
	d. Non-Capital Objects (400s) Supplies & Materials			
	e. Capital Objects (500s) equipment			
	TOTAL Instruction	\$0		
Support Services—Pupil and Instructional Staff Services (in 210 000 and 220 000 Series) Support services are those which facilitate and enhance instructional or other components of the grant. This category includes staff development and supervision.	a. Salaries (100s), extended contracts, subs	\$1,000		
	b. Fringe Benefits (200s)			
	c. Purchased Services (300s)	\$2,500		
	— Purchased Services—Charter School Network (300s)	\$0		
	d. Non-Capital Objects (400s) Supplies & Materials			
	e. Capital Objects (500s) equipment			
	TOTAL Support Services—Pupil/Instructional Staff Services	\$3,500		
Support Services—Administration* (Associated with functions in 230 000 series and above.) Includes general, business, and central service administration.	a. Purchased Services (300s)			
	b. Non-Capital Objects (400s) Supplies & Materials			
	c. Capital Objects (500s) equipment			
	TOTAL Support Services—Administration	\$0		
Total Phase I Budget	Do not exceed 50% of Total Grant.	\$3,500		
DPI Approval	Signature of DPI Reviewer ➤			Date Signed Mo./Day/Yr.

* No LEA may deduct administrative fees from subgrant funds that are not mutually agreed upon and voluntary. Any administrative fees or expenses reserved from the subgrant are prohibited unless agreed to by the chartering authority and the subgrantee [Section 5204(f)(4)(B), NCLB Act 2001]. USDE staff has indicated that administrative expenses may not exceed 5 percent of the grant award.

Grant recipients may make budget adjustments up to 10 percent higher or lower in any approved category; changes larger than 10 percent require DPI approval.

Budget Revisions: Submit a copy of this page or PI-9600-B with appropriate revisions included, with justification provided. Submit request at least 30 days prior to expenditure of grant monies.

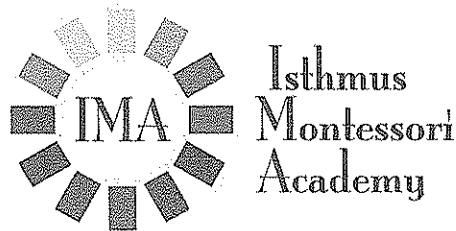
VII-B. BUDGET SUMMARY—PHASE II

Authorizer Madison Metropolitan School District	Charter School Name Isthmus Montessori Academy	Grant Period Begin August 1, 2014	End July 31, 2015	Project Number For DPI Use Only
WUFAR Function	WUFAR Object	Phase I		Phase II Amount
Instruction (100 000 Series) Activities dealing directly with the interaction between instructional staff and students.	a. Salaries (100s)			
	b. Fringe Benefits (200s)			
	c. Purchased Services (300s)			
	d. Non-Capital Objects (400s) Supplies & Materials			\$102,000
	e. Capital Objects (500s) equipment			
	TOTAL Instruction	\$0		\$102,000
Support Services—Pupil and Instructional Staff Services (in 210 000 and 220 000 Series) Support services are those which facilitate and enhance instructional or other components of the grant. This category includes staff development and supervision.	a. Salaries (100s), extended contracts, subs	\$1,000		
	b. Fringe Benefits (200s)			
	c. Purchased Services (300s)	\$2,500		
	d. Non-Capital Objects (400s) Supplies & Materials			
	e. Capital Objects (500s) equipment			
	TOTAL Support Services—Pupil/Instructional Staff Services	\$3,500		\$0
Support Services—Administration* Associated with functions in 230 000 series and above. Includes general; business; and central service administration.	a. Purchased Services (300s)			
	b. Non-Capital Objects (400s) Supplies & Materials			
	c. Capital Objects (500s) equipment			
	TOTAL Support Services—Administration	\$0		\$0
Total Phase II Budget	Phase I Total	\$3,500		\$102,000
TOTAL BUDGET				\$105,500
DPI Approval	Signature of DPI Reviewer ➤			Date Signed Mo./Day/Yr.

* No LEA may deduct administrative fees from subgrant funds that are not mutually agreed upon and voluntary. Any administrative fees or expenses reserved from the subgrant are prohibited unless agreed to by the chartering authority and the subgrantee [Section 5204(f)(4)(B), NCLB Act 2001]. USDE staff has indicated that administrative expenses may not exceed 5 percent of the grant award.

Grant recipients may make budget adjustments up to 10 percent higher or lower in any approved category; changes larger than 10 percent require DPI approval.

Budget Revisions: Submit a copy of this page or PI-9600-B with appropriate revisions included, with justification provided. Submit request at least 30 days prior to expenditure of grant monies.



Executive Summary

The following pages articulate our request for a charter planning grant to create a Montessori charter school in Madison, Wisconsin. Isthmus Montessori Academy opened its doors in September 2012 and currently serves 37 children ages 1 to 9. As a charter, it will serve students in grades 4K-12. The School will begin with Children's House, Lower Elementary, and Upper Elementary classrooms of mixed ages (K3 daycare students, K4 and K5, grades 1-3, and grades 4-6), and gradually add Junior High and High School classrooms of mixed ages (grades 7-9 and grades 10-12).

The primary educational model will be AMI Montessori, encompassing the curriculum areas of language, mathematics, history, health and wellness and self-care, geography, science, geometry, biology, art, music, and physical education. Because the Montessori tradition is still unfamiliar to many, we have provided some detailed information about its history and contemporary application alongside our educational goals and plans. The proposed Charter School launch is September 2015.

The Montessori Method was developed in the early 1900's by Dr. Maria Montessori, who sought to deliver high quality education to the very poorest of children living in Rome, Italy. Through her medical and scientific training and keen observation skills, Dr. Montessori recognized that children acquire knowledge directly from life experiences. She found that children cannot help but learn, that they are born to learn, but what they learn depends greatly on their teachers, their experiences and their environments.

Dr. Montessori designed curricula, unique materials and an individualized approach to education based on the academic, developmental and psychological needs of the children she served. She was twice nominated for the Nobel Peace Prize, in part for the Education for Peace work she did later while living in India during World War II. Today the Montessori Method is used worldwide in both public and private settings, educating children from birth through high school.

Montessori is one of world's largest pedagogies with over 22,000 schools and over 6,000 schools in the US. Almost 500 of these US schools are public programs. Of Wisconsin's 19 public Montessori schools, 9 are located in Milwaukee. When applied authentically, research has demonstrated the philosophy's effectiveness in addressing issues of achievement gap and self-regulation while producing superior academic results in both English language arts and mathematics.

Public Montessori schools are meeting or exceeding Common Core State Standards as they continue to prepare all children for the modern-day workforce demands of innovative and critical thinking, independent work, and group collaboration. Through our commitment to the Montessori Method, Madison Metropolitan School District, the City of Madison and the State of Wisconsin, we will create an economically sustainable, high quality charter school.

Application Narrative: Isthmus Montessori Academy
The Charter School Vision for Innovation

1. Describe the educational vision and philosophy which will drive your charter school planning effort including the underlying theories and research which support that vision.

The Charter School movement's hallmark is a drive for innovation and new approaches to persistent achievement gaps. At Isthmus Montessori Academy, we believe, and the research supports, that the most innovative program in education is actually more than a century old.

At work with developmentally disabled students in tenement slums in Italy, Dr. Maria Montessori discovered through scientific observations of children that they are not empty vessels to be filled -- they are intrinsically motivated doers. She saw that providing a hands-on learning environment that valued choice, concentration, collaboration, community, curiosity, and real-world application produced lifelong learners who viewed "work" as something interesting and fulfilling instead of drudgery to be avoided. Now, research in psychology and neuroscience continually validates Dr. Montessori's conclusions about children and learning, and Montessori schools are flourishing. Dr. Steven Hughes, board certified pediatric neuropsychologist, chairs the American Montessori Internationale's Global Research Committee and educates groups worldwide about the cognitive developmental benefits of Montessori. Dr. Hughes specializes in issues of attention, concentration and related executive function and he states that Montessori children are, essentially "good at doing things."

Since 1907, when the first school opened as part of an urban renewal project in the tenements of Rome, Montessori education has played a role in serving the most vulnerable families. Today, there are more than 22,000 Montessori schools worldwide. The US is the world leader with more than 5000 Montessori programs. Nearly 500 of these schools are public or charter schools, serving families regardless of their ability to pay, 19 in the state of Wisconsin alone. Montessori is recognized as a time-tested, developmental, and research-based educational approach that attracts families from all ethnicities, social classes, and cultures.

The case for Montessori education—that children educated in fully implemented Montessori programs gain superior intellectual and social capacities—is grounded in an increasingly compelling research base. We have conclusive evidence that children learn best in environments that are highly enriched, student-centered, and structured. Just as compelling is a research base that demonstrates the link between self-regulation, independence, collaboration, creativity, and respect for self and others and real success.

(a) Describe how the concept of a charter school was introduced. Who initiated the concept and why?

Isthmus Montessori Academy (IMA) was the brainchild of teacher leaders, Carrie Marlette and Melissa Droessler, over the course of a combined 29 years of teaching experience. Carrie and Melissa taught together at a tuition-based AMI Montessori school in Madison. Carrie continued to teach in Madison while Melissa took an opportunity to teach at Craig Montessori School, one of the eight Montessori schools that are part of the Milwaukee Public School District. Melissa's family relocated back to the Madison area where she reconnected with Carrie to build an AMI Montessori school accessible to all children and families. Carrie observed in the public Montessori schools of the Milwaukee Public School district and these women decided that it was time to offer such a complement to the Madison Metropolitan School District. While teaching for the Milwaukee Public School district, Melissa observed children thriving in an AMI Montessori environment.

IMA is currently a private, tuition-based program founded with the intention to engage in the chartering process with MMSD. The hopes of its teacher leaders, nonprofit community board, parents, and volunteers have always been to bring Montessori to the public sector in Madison. The school currently serves 37 children in K4 through 3rd grade. By growing to scale, IMA plans to educate over 300 students in grades K4 - 12th grade by 2020, bringing an increasing revenue stream annually to MMSD.

The State of Wisconsin has the largest number of students in public and charter Montessori schools in the US. More than 3,000 students are educated daily in Milwaukee alone, a larger population than many individual districts throughout the state. Wisconsin has the great advantage of having many well-established and successful working models and a cadre of expert Montessori practitioners. In addition to this, theoretical and training expertise is available through the Montessori Institute of Milwaukee, a part of the Loyola College graduate program, which

offers the only AMI-approved Master's degree in the United States. Wisconsin is *de facto* the national center for public Montessori schools, and has major resources present to assist in effective and efficient charter development. New Montessori endeavors can and have begun high on the learning curve throughout the state.

There has been a steady increase in public Montessori schools across the United States during the past two decades. Public school districts, especially in urban areas, are attracted to Montessori education as a way to provide quality early education in traditionally poverty-stricken neighborhoods and help close the achievement gap, likely to increase in the higher grades, that emanates, at its root in disparities in preschool and elementary education. In addition to providing superior cognitive development and skills in reading, mathematics, and writing as well as nurturing environments with a caring staff and close school-home partnerships, these schools are safe and peaceful environments where fear can be reduced, self-concept developed, and self-esteem increased.

We believe that MMSD students will benefit from being part of this vibrant network of community schools, while our parents and educators can participate in engagement and professional development provided throughout the state by our partners. In surveys completed in the City of Milwaukee of over 350 parents with children enrolled in public Montessori schools, there was an overwhelming expression of extremely high satisfaction. Such positive results are exceptionally rare especially in large urban school districts in which poverty is a major blight and has a detracting and devastating impact on attempts at quality education.

Today, seven tuition-based Montessori programs serve families in the Madison area, educating more than 300 students each day. Therefore, the only children currently able to experience the Montessori approach are those from families who can afford this private option. This is in direct contrast to the philosophic origins of Montessori education (as an urban school for poor children). The hands-on nature of Montessori makes it an excellent vehicle for children of different backgrounds, experiences and learning styles.

(b) As part of your vision or mission statement, describe the results of your student data analysis. Did your analysis identify any student achievement gaps? How does this charter school close an achievement gap in your community?

In becoming a charter school IMA hopes to implement, with fidelity, Madison's first public Montessori school, joining the growing, dynamic, and successful Montessori sector in Wisconsin's educational landscape. Our mission is to become authorized as Madison's first public Montessori school, thereby adding to the exceptional schooling options within the Madison Metropolitan district and creating a school that can meet the needs of a diverse student body.

AMI Montessori education meets the achievement gap head-on as its curriculum creates an individualized education plan for each child, allowing each person to reach his or her greatest success, while allowing the kind of bottom-line improvements in narrowing the achievement gap that are required for college and career readiness. Our evidence that the Montessori Method is effective in public school settings is clear, ranging from controlled studies of student performance in the Milwaukee Public Schools to the current superior testing results of the students in our public Montessori schools as compared to the district as a whole. Furthermore, the benefit of a Montessori education is seen across the socioeconomic spectrum and in areas that correlate strongly with long-term success such as creativity and executive function.

In the Journal "Science" in 2006, a longitudinal study that compared the educational achievement performance of low-income Milwaukee children who attended Montessori schools versus children who attended a variety of other preschools, as determined by a lottery. By the end of kindergarten, among 5-year-olds, "Montessori students proved to be significantly better prepared for elementary school in reading and math skills than the non-Montessori children," according to the researchers. "They also tested better on "executive function", the ability to adapt to changing and more complex problems, an indicator of future school and life success."

A specific analysis of achievement rates across socioeconomic and racial subgroups was studied. As a whole, the Montessori schools within the Milwaukee school district (MPS) sharply outperform their peers in the traditional classroom (attaining 62% on the 2012-2013 WI State Report Card versus 51.4% for MPS as a whole; MMSD scores

68.5% at the district level with a population that is more affluent and less diverse than those MPS educates). In the Montessori sector, three schools with populations that more closely resemble MMSD (Craig Montessori in Milwaukee, Maryland Avenue Montessori in Milwaukee, and Coulee Charter Montessori in LaCrosse) scored 63.6%, 69.7% and 71.9%, respectively.

When considering the achievement gap, and specifically the disparity in graduation rate, educators often point to early at-risk indicators that show whether students are on-track for graduation. As early as 9th grade, poor attendance and behavior, and lagging performance in English Language Arts and Math can warn of students likely to drop out in the later high school years. The best defense against the dropout crisis is preparation at the early grade levels. Montessori schools are warm environments with above average attendance levels, high expectations for behavior reinforced by the specific classroom climate that begins in the earliest years, and attain near-universal literacy by 3rd grade. When students read at or above grade level in 3rd grade, we know that they are significantly more successful across their entire academic careers. We believe that Montessori education is a fertile climate for early intervention, creating a generation of lifelong learners who thrive in high school and beyond.

(c) Describe why a charter school is needed to achieve this vision. How did you assess community and parent support for this new charter school? How is the school innovative and unique and how will it differ from schools now currently available to students in the district? Why can't the vision be accomplished by merely adding a program to existing offerings.

Currently, there are no public Montessori schools in Madison. The founders of Isthmus Montessori Academy, community members, and parents, have come together as a group, committed not just to Montessori, but also to creating an opportunity for pedagogical differentiation within the public school system. The most appropriate approach for us, as currently defined by the Wisconsin Department of Public Instruction, is the charter model. Community support has been assessed through listening to parent requests at multiple private Montessori schools in Madison, starting a petition, and surveying the heads of school at these schools. The school's innovation and uniqueness have been addresses in prior sections. Because the program is so unique in its materials, schedule, additional teacher training, etc., it needs to stand on its own rather than being incorporated into an existing program.

(d) Explain how the charter school provides its students' core academic subjects

Montessori Education is founded on the following:

Multi-aged Grouping: based on Planes of Development, with a 3 year age span at each level. There are four planes of development, with sub-phases in each: 0-3, 3-6, 6-9, 9-12, 12-15, 15-18, 18-21 and 21-24. The Montessori Toddler, Primary, Elementary, Middle School and High School levels fall within these planes. Montessori programs provide an environment suited for the child at each plane of development. While the guiding principles do not change, the materials become more and more complex as the child gets older. Each level lays the groundwork for the next. Ultimately, the child will move from the concrete to the abstract. Internalization, not memorization, is the objective.

The Human Tendencies: The Montessori teacher is trained to observe and respond to the human tendencies that all children manifest, i.e., the need to explore, to become independent and self sufficient, to create order, to move, to develop self control, to work, to learn from concrete experiences, to repeat, to concentrate, to perfect one's effort. Role of the Teacher: To prepare a warm, loving and stimulating environment and to connect the children with the concrete materials. Once the teacher can tap into the child's interests, then the possibility of deep concentration can occur. It is through concentration and work, freely chosen, that the child develops self-discipline, responsibility and inner peace. Dr. Montessori referred to this higher state of equilibrium as "normalization." The child who is normalized manifests a desire to help others.

Instead of cycling in and out of various subjects every 40 to 50 minutes, children are given longer periods of uninterrupted work time. During a morning or afternoon work period, children can take their work through its beginning, middle, and end stages. Working through this natural sequence promotes competence and mastery; children can repeat the activity as many times as they wish without being told to hurry up and move on to something

else. Montessori-style learning helps kids learn the fine art of shared concentration by encouraging them to engage in tasks with a classmate or two, a critical skill in this modern age of collaboration. Working in twos and threes promotes mentoring and knowledge transfer; children share their enthusiasm for a task and build up the confidence of younger students. Greater confidence, longer attention spans, and natural self-motivation are a few of the rich rewards.

One way Montessori promotes focus is through a carefully prepared environment, a key component of Montessori learning. In Montessori classrooms, specially designed materials — from child-size brooms to lacing cards to counting beads — are prepared to be aesthetically appealing and accessible for young children; simplicity, beauty, and order are paramount. Montessori-taught children choose their own work from a palette of developmentally appropriate options that grow progressively more complex and challenging. Montessori schools incorporate concrete learning goals into a child's educational plan, but children are free to choose when and how to complete their work within a specified timeframe. When children are motivated by their own interests, deep concentration is a natural result.

Process of Learning: Lessons are based on the Three Period Lesson:

- Period 1 – Teacher introduces concept (initially with concrete materials)
- Period 2 – Child explores with the materials and works to understand the concept
- Period 3 – Child shows mastery of the concept

Sensitive Periods: The child passes through periods when he is drawn to the mastery of a particular concept or skill. Sensitive periods act like the focusing device on a camera and when given the opportunity to pursue his interest during this special time, he will be able to learn effortlessly. These sensitive periods are transitory and once they serve the purpose of helping the child acquire certain skills or characteristics, will die away, often to be replaced by another and quite different one. The child begins to create himself through the intense and prolonged activity he/she sustains when aroused by a sensitive period. It is at this time we observe peace expressed through a child.

Class Size: Recommended class size for 3-6 or 6-12 is 27-32 students to one teacher and one non-teaching assistant. The class size is ideal for three reasons:

- The older children help to teach and model for the younger children
- The students stay with the same teacher for 3-6 years
- The teacher connects the children to the Montessori materials and then invites the children to carry out their natural desire to explore on their own. Many of these materials are also self-correcting.

Montessori's approach to motor development actually stimulates cognitive development and deep concentration. When children begin Montessori education at age 3 or 4, they work on motor-skills activities like sweeping, polishing silverware, and pouring. These aptly named "Practical Life" activities prepare children for greater independence and self-reliance in daily tasks, but there's something bigger going on — the development of higher cognitive functions essential to concentration, coordination, and independence. In addition, positive behavior and exemplary conduct are developed through "Grace and Courtesy": Children learn the importance of taking care of themselves, their environment and each other. Very quickly, they form a community, one for which they learn to take responsibility. At the heart of these lessons and practices of mindfulness is the development of empathy, helping children learn the value of respecting others.

In Montessori: The Science behind the Genius, Dr. Angeline Stoll Lillard states, "no other single educational curriculum comes close to the Montessori curriculum in terms of its levels of depth, breadth, and interrelationship across time and topic." AMI Montessori is based in the core curriculum areas of language, mathematics, history, health and wellness and self-care, geography, science, geometry, biology, art, music, and physical education. The curriculum meets or exceeds, and often maps closely with, the Common Core State Standards in most areas. The concept of providing a child with a deep understanding of concepts through experiences with concrete materials in place of superficial knowledge and rote memorization is a key tenet of the Montessori Method, and is achieved with beautifully designed materials found in Montessori classrooms around the world.

2. Provide a description of:

- a) **The grade levels of children to be served (you must serve at least 40 students in two grades);**
Isthmus Montessori Academy will serve children in K4 through 12th grade. Upon opening, the charter school will serve K4 through 6th grade. Enrollment projections for the first five years are as follows:

Multi-Age Classrooms	Grade/Year	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020
Primary/Children's House	4K	25	25	34	34	42
	K	25	25	34	34	42
Lower Elementary (ages 6-9)	1	17	17	17	25	25
	2	17	17	17	25	25
	3	17	17	17	25	25
Upper Elementary (ages 9-12)	4	10	20	20	20	20
	5	10	20	20	20	20
	6	10	20	20	20	20
Junior High (ages 12-15)	7		10	10	15	15
	8		5	10	15	15
	9		5	15	15	15
High School (ages 15-18)	10			10	20	10
	11				10	20
	12					10
	Total	131	181	224	278	304

The number of classrooms for 2015-2016 will be as follows:

- Three Primary classrooms serving 25 4K students and 25 Kindergartners
- Two Lower Elementary classrooms serving approximately 17 1st graders, 17 2nd graders, and 17 3rd graders
- One Upper Elementary classroom serving 27-32 students with approximately 10 children in each grade at the 4th-6th grades
- The school will eventually be able to offer one High School program with approximately 90 students in grades 10-12.

b) **The primary educational model to be used (see page 7 of these instructions);**

The primary educational model will be AMI Montessori. This entails the aforementioned curriculum areas of language, mathematics, history, health and wellness and self-care, geography, science, geometry, biology, art, music, and physical education. A typical day in a Montessori classroom consists of one to two, uninterrupted three-hour work periods. A work period consists of individual or group lessons and child-directed work choice based on lessons given. Children may arrive at 8am and have a work period until 11am. Children may then enjoy lunch and recess until 12pm. The children will then continue a second, afternoon work period.

- c) **The measurable goals of the charter school (these goals must be reflected in the charter). This does not include student achievement goals (see question 2.e. below);**

The charter school (IMA) will measure positive school climate, community service, and parent involvement.

- d) **The means of measuring the charter school goals in each year of the charter;**

IMA will measure positive school climate, community service, and parent involvement through program planning and implementation, surveys, attendance, attrition, and participation.

- i. We will measure positive school climate through the planning and implementation of the Montessori Code of Conduct curriculum as reflected in educator lesson plans, child portfolios, and regular progress communication. This ensures that everyone in the school really, truly communicates every day. We will also measure the positive school climate through child, parent, and staff surveys conducted twice each school year. Additionally, attendance, attrition, and classroom behavior will be measured and documented monthly to be included in an annual report created by the principal.
- ii. IMA will measure community service through the amount of hours spent directly working with community members to achieve a common goal, through the amount of money/gifts in-kind raised for a particular community organization or cause, and through an annual community involvement survey given to organizations with whom the children and school community interact.
- iii. Parent involvement will be measured through attendance at parent-teacher conferences, attendance at committee meetings, attendance at school social and community events. Parent involvement will also be measured by opportunities presented by IMA for parent participation such as monthly parent education seminars, social/community events, and a parent resource center. Parent surveys will be presented every fall and spring.

Goals	Year 1 (2015-2016)	Year 2 (2016-2017)	Year 3 (2017-2018)	Years 4 and 5 (2018-2019//2019-2020)
IMA Creates and Maintains a Positive School Climate	80% of students are consistent in 50% of social/emotional development goals by end of year	85% of students are consistent in 50% of social/emotional development goals by end of year	90% of students are consistent in 50% of social/emotional development goals by end of year	95% of students are consistent in 50% of social/emotional development goals by end of year
	80% of student, parent, and staff surveys completed receiving satisfactory rating	85% of student, parent, and staff surveys completed receiving satisfactory rating	90% of student, parent, and staff surveys completed receiving satisfactory rating	95% of student, parent, and staff surveys completed receiving satisfactory rating
	90% attendance	95% attendance	97% attendance	97% attendance
	95% of children are present for classroom activity/instruction related to behavior	96% of children are present for classroom activity/instruction related to behavior	97% of children are present for classroom activity/instruction related to behavior	97% of children are present for classroom activity/instruction related to behavior
	60% retention rate of continuing students	65% retention rate of continuing students	70% retention rate of continuing students	80% retention rate of continuing students
IMA Community Involvement	80% students will complete 1 hour of community service	85% students will complete 1 hour of community service	90% students will complete 1 hour of community service	95% students will complete 1 hour of community service

t	each semester	each semester	each semester	each semester
	\$1,000 dollars raised for student-elected community causes	\$2,000 dollars raised for student-elected community causes	\$4,000 dollars raised for student-elected community causes	\$5,000 dollars raised for student-elected community causes
	80% of community organizations/businesses complete community involvement survey	80% of community organizations/businesses complete community involvement survey	80% of community organizations/businesses complete community involvement survey	80% of community organizations/businesses complete community involvement survey
Parent Involvement	80% Parent attendance at conferences	85% Parent attendance at conferences	90% Parent attendance at conferences	90% Parent attendance at conferences
	70% Parent attendance at school social events	70% Parent attendance at school social events	70% Parent attendance at school social events	70% Parent attendance at school social events
	30% Parent attendance at school social events	35% Parent attendance at school social events	40% Parent attendance at school social events	40% Parent attendance at school social events

- e) The measurable student achievement goals for each year not to exceed five years (these goals must be reflected in the charter); and

Year 1 (2015-2016)	Year 2 (2016-2017)	Year 3 (2017-2018)	Years 4 and 5 (2018-2019//2019-2020)
70% of students grades 3-12 will participate in a mentorship project and prepare a presentation for a Responsibility Forum	75% of students grades 3-12 will participate in a mentorship project and prepare a presentation for a Responsibility Forum	80% of students grades 3-12 will participate in a mentorship project and prepare a presentation for a Responsibility Forum	90% of students grades 3-12 will participate in a mentorship project and prepare a presentation for a Responsibility Forum
100% of students develop a personal mission statement	100% of students develop a personal mission statement	100% of students develop a personal mission statement	100% of students develop a personal mission statement
100% of students grades 1-12 will keep a daily work and activity journal	100% of students grades 1-12 will keep a daily work and activity journal	100% of students grades 1-12 will keep a daily work and activity journal	100% of students grades 1-12 will keep a daily work and activity journal
85% of students will demonstrate an average of one year's growth in reading	90% of students will demonstrate an average of one year's growth in reading	95% of students will demonstrate an average of one year's growth in reading	95% of students will demonstrate an average of one year's growth in reading
85% of students will demonstrate an average of one year's growth in math	90% of students will demonstrate an average of one year's growth in math	95% of students will demonstrate an average of one year's growth in math	95% of students will demonstrate an average of one year's growth in math
80% of students grades 1-	85% of students grades 1-	90% of students grades 1-	95% of students grades 1-

12 will have a monthly child-led work conference	12 will have a monthly child-led work conference	12 will have a monthly child-led work conference	12 will have a monthly child-led work conference
50% of students grades 1-12 will complete a research-inspired, point of arrival called a *Going Out.	50% of students grades 1-12 will complete a research-inspired, point of arrival called a *Going Out.	50% of students grades 1-12 will complete a research-inspired, point of arrival called a *Going Out.	50% of students grades 1-12 will complete a research-inspired, point of arrival called a *Going Out.
70% of students will participate in a community service project	70% of students will participate in a community service project	80% of students will participate in a community service project	90% of students will participate in a community service project
50% of students grades 10-12 prepare and host a Parent Education gathering.	50% of students grades 10-12 prepare and host a Parent Education gathering.	50% of students grades 10-12 prepare and host a Parent Education gathering.	50% of students grades 10-12 prepare and host a Parent Education gathering.

* This is fundamental to a successful Montessori program for the Elementary and beyond.

f) The means of measuring the student achievement goals each of the first five years.

Assessment (formative and summative) for each of the student achievement goals listed above may include, but not be limited to the following:

- Student performance on the WKCE, Renaissance STAR Reading and Math, or such other state mandated assessment
- Annual review of student Mission Statements
- Parent satisfaction survey
- Progress Communication (Progress Reports)
- Student attendance data
- Student-led conferences including ongoing student evaluation of progress
- Ongoing teacher evaluation of student progress
- Comprehensive student portfolios
- Performance-based assessment through project learning
- Student presentations
- ACCESS for ELL student
- School climate surveys

3. Describe the charter school's two- to three-year professional development plan:

a) Competencies, skills, and knowledge requirements for successful implementation of the primary educational model at IMA charter school:

IMA School Administrator	5 Years teaching experience in an AMI Montessori school.
	AMI Montessori training at the Primary and/or Elementary as well as DPI certification.
IMA Lead Teachers	All teachers must meet required state certifications.
	AMI certified for the specific age range they teach
IMA Educational Assistants	Must have received a Montessori Theory course

IMA Faculty and Staff	Will need to maintain and further develop genuine and positive connections with children, families, and local community.
IMA Support Staff (Special education, school psychologists, diagnostic technicians, school social workers, non-teaching aids, art, music, gym, library science)	Will need on-going workshops and opportunities for observation and discussion to support their understanding and practice of Montessori principles.

b) IMA Professional Development Plan

Category	Planning Year 2014-2015	Year 1 Implementation 2015-2016	Year 2 Implementation 2016-2017
Montessori Educator Training	DPI certified teachers and administrators will be hired and begin their appropriate Montessori teacher training.	Teachers will develop professional development goals founded upon Montessori best practices Additional DPI certified teachers will be hired and begin appropriate Montessori teacher training to accommodate enrollment projections.	Teachers will develop professional development goals based on success/progress of prior year New teachers will develop professional development goals founded upon Montessori best practices Additional DPI certified teachers will be hired and begin appropriate Montessori teacher training to accommodate enrollment projections.
Montessori Training for all additional Educational Staff	Teacher assistants and enrichment educators will attend a Montessori theory course	Any new assistants and enrichment educators will attend Montessori theory course	Any new assistants and enrichment educators will attend Montessori theory course
Connections with state and national Montessori networks	Maintain close working relationships with WMA, MIM, and AMI Through visits to other Montessori charter schools in the nation, IMA will identify one school in particular to serve as a mentor school	Maintain close working relationships with WMA, MIM, and AMI Professional teacher memberships in AMI, WMA, WCSA, and Public School Montessorian Attendance at WCSA and WMA	Maintain close working relationships with WMA, MIM, and AMI Professional teacher memberships in AMI, WMA, WCSA, and Public School Montessorian Attendance at WCSA and

	<p>Professional teacher memberships in AMI, WMA, WCSA, and Public School Montessorian</p> <p>Attendance at WCSA and WMA conferences will be made available to all Governance Board members, teachers, and staff to broaden their knowledge and skills as Montessori and charter leaders and to share best practices, and to the AMI conference for all teachers at IMA</p>	<p>conferences will be made available to all Governance Board members, teachers, and staff to broaden their knowledge and skills as Montessori and charter leaders and to share best practices, and to the AMI conference for all teachers at IMA</p>	<p>WMA conferences will be made available to all Governance Board members, teachers, and staff to broaden their knowledge and skills as Montessori and charter leaders and to share best practice</p> <p>s, and to the AMI conference for all teachers at IMA</p>
Community Outreach and Education and Engagement	<p>Further develop Parent Education plan</p> <p>Continue to host Parent Education events bi-monthly</p> <p>Meetings and interviews with community groups and experts</p> <p>Continue to collaborate with local farm to continue a farm to school program</p>	<p>Continue to host Parent Education events bi-monthly</p> <p>Meetings and interviews with community groups and experts</p> <p>Continue to collaborate with local farm to continue a farm to school program</p> <p>Develop plans for urban garden on school campus</p>	<p>Continue to host Parent Education events bi-monthly</p> <p>Meetings and interviews with community groups and experts</p> <p>Continue to collaborate with local farm to continue a farm to school program</p>
Technology Training	<p>Develop a technology plan with human brain development and Montessori best practices as the foundation</p>	<p>Create technology plan for Upper Elementary, Junior High and beyond</p>	<p>21st Century Schools Workshop: The Global Classroom</p>
Sustainability and Wellness Education	<p>Collaborate with Nature's Classroom Institute (NCI) and Montessori School of Lake Forest to develop urban farm equivalent for Upper Elementary, Adolescent, and High School environmental education</p>	<p>Send adolescent (JH) teachers and students to NCI</p>	<p>Implement garden plans and maintenance plans</p> <p>Send Upper Elementary teachers and students to NCI for one visit and Adolescent (JH) teachers and students for 2 visits to complete on-going projects</p>

c) Describe how the necessary training will be provided each year for new employees or employee transfers.

New employees will be expected to have received all necessary certifications. They will become thoroughly familiar with the school through a mentorship and orientation program. They will receive weekly observations and assessments for the first twelve weeks of employment from either a lead teacher or the head of school.

d) When school districts authorize charter schools and receive federal funding, significant resources are invested in professional development during the initial three years. Please describe efforts that will be undertaken to retain these teachers in the charter school.

An IMA educator values statement of practice is to enjoy working and learning with children, families, and community. IMA is a vibrant and inspiring environment to educate and guide each child to reaching his or her fullest potential. IMA is currently founded upon and will maintain a school culture of dedication, passion for learning, and developing peaceful relationships, attracting and retaining high quality educators. After the initial implementation year of the charter grant, the IMA Governance Council will have the ability to raise at least \$6,000 each year to allocate specifically for professional development.

Governance and Autonomy

Isthmus Montessori Academy has already developed by-laws and is established as a non-stock corporation in the state of Wisconsin as of August 2013.

Questions 1-3 regarding exemptions from state and school board policies.

Initial analysis suggests that some State and School Board policies may need to be waived, including, but not limited to the following:

- Class Size (3450)
- Field Trips (3350)
- Evaluation and selection of Learning Materials (3611)
- In-service Program for teaching staff to allow for Montessori specific training and professional development along with needed district-wide professional development.
- School Calendar: A flexible school-year calendar will accommodate professional development and community-based programs. This possibility will be explored during the Plan Year
- Staff professional development: IMA staff will need to pursue professional development beyond district requirements focusing on the specific pedagogy of IMA which is the American Montessori International standard.
- Articles which may be considered to ensure adherence to Montessori teacher standards may include, from Chapter 118 General School Operations, 118.19, 118.192, 118.21, 118.22, 118.23, 118.225 which detail certificates and licenses, teaching permits, contracts and renewals, tenure, and evaluations.
- Curriculum Development
- Instructional Program
- Student Assessment: IMA students will undergo WI State testing, however additional Montessori assessments(s) will be developed and implemented
- Special Programs by community volunteers
- Summer School
- Gifted and Talented
- Technical Preparation Programs
- Animals on School Property
- Petitioning current MMSD teachers – WI State 118.40 (1m)

Additional analysis will be performed relative to state, federal, and other regulatory provisions as the charter is further developed.

As is done in other locations in Wisconsin with traditional and/or instrumentality charter Montessori schools, master contracts between the MMSD Board of Education and MTI will be modified through the use of memorandums of understanding to allow the structure of this school to conform to the Montessori method and to allow the teaching staff more flexibility in terms of hiring practices. As warranted, such changes might include giving preference to Montessori-trained staff, allowing the district to pay for the certification of Montessori teachers, or modifications of bumping procedures.

4. Charter schools have a separate governance board that is legally able to contract with the authorizer. This board has autonomy and control over charter school policies, procedures, personnel, instructional programs and the budget.

a) Describe your plans to establish an independent charter school governing board if you have not done so.

The IMA Charter Governance Council will be further established in the summer of 2015 and will consist of seven members. If necessary, the Council will amend IMA by-laws and undergo additional training. The IMA Charter Governance Council will negotiate with the MMSD Board of Education for a 5-year charter contract. The IMA Governance Council will meet monthly, with additional finance and curriculum committee meetings. Throughout the entire development and training of our Governance Council as well as the development of our contract, we will be working closely with consultants from WMA and WISN.

b) Describe the authority this governing board will have to make decisions regarding budgets, personnel, curriculum, charter school policies and the overall operation of the charter school.

As a charter school contract in accordance with s. 118.40, Wisconsin Statutes, and in particular, the provisions specified under sub. (1m)(b) 1. to 15., the IMA Governance Council will be the governance entity carrying out the scope and intent of this charter contract. IMA is an instrumentality of the MMSD Board of Education, as delineated by Wisconsin State Charter School Law.

The IMA Governance Council shall manage the following educational and collaborative aspects of IMA as the council works in partnership with the MMSD district leadership to successfully implement IMA.

- Curriculum and instruction
- Personnel and professional development
- Calendar and daily schedule
- Marketing, registration and enrollment
- Budget expenditures of allocated budgets, grant funds and funds donated specifically to IMA

The School District will provide IMA with an operational budget. IMA will then submit a plan for the expenditure of said funds showing the District its best estimate of its proposed total expenditures and liabilities for administering the Contract. Operational funds shall be available to the Charter School at the same time and in the same manner they are made available to other schools within the District. IMA shall be eligible to receive remedial services, IT services, student support services, special education services and testing/assessment services available to other schools in the District, with the distribution of such resources to be determined in a manner consistent with the distribution of such resources to other schools and/or programs in the District. As an independent entity, IMA Governance Council has the discretion and authority to independently apply for and independently administer grant and gift resources.

c) Provide a description of the administrative relationship between the charter school and the authorizer and describe how the charter school will be managed. If sharing a principal with a traditional school, indicate how the management of the charter school will be impacted.

As a charter school contract in accordance with s. 118.40, Wisconsin Statutes, and in particular, the provisions specified under sub. (1m)(b) 1. to 15., the IMA Governance Council is the governance entity carrying out the scope and intent of this charter contract. Daily administration of IMA will be the responsibility of an AMI Montessori trained administrator. This IMA faculty will develop and sustain itself as a professional learning community.

d) Describe the specific training that will be provided to the charter board and when it will be delivered, e.g. governing authority, Roberts Rules, by-laws, finances/budgets, fund raising, parent involvement etc.

The IMA Governance Council will work closely with WMA and WISN and attend professional development workshops through Wisconsin Innovative Schools Network (WISN) and Wisconsin Charter Schools Association (WCSA) as well as the WISN state conference and National Charter School Conference. Moreover, as appropriate, the IMA Governance Council will connect with other Charter Governance Councils like Highland Community School Governance Council. This networking will increase the strategic leadership capacity and charter school understanding with shared best practice in non-profit leadership, protocols and processes that the IMA Governance Council will take advantage of during its tenure. The committees will have strong parent and community involvement. Excellent materials and training are also available through the National Board of Charter School authorizers. Moreover, there are many leadership development opportunities available in the greater Madison and Milwaukee areas for non-profit leadership development that can provide experiences around governing authority, Roberts Rules, by-laws, finances/budgets, fundraising, parent involvement, policies/procedures, etc.

The Planning Process

1. Describe the present state of your planning process; the activities undertaken to date; the types of people involved in the process; the financial or other resources available; the involvement of the chartering authority or district school board, administration, and staff; the involvement of parents and community; the work completed and the work which remains to be done to develop a successful charter school.

Include these items in your narrative:

Provide a description of how parents and other members of the community have been involved in the planning and design of the charter school. Discuss the results of a student data analysis and needs assessment measuring community and parent support for the new school. Describe how this school will close the achievement gap.

Attach three letters of support for the proposed charter school from parents and community members.

September 2011	IMA is conceived as a school which will be accessible to all children and families of the Madison area. The Original Planning Team was formed and consisted of Carrie and Melissa with the advisement of parents and community members, the Director of Training at the Montessori Institute of Milwaukee, five master Montessori teachers, and the Executive Director Montessori Charter Management Organization.
January 2012	IMA becomes incorporated in the state of WI and 501(c)3 process begins
February 2012	Montessori materials purchased for one primary and one elementary classroom
March 2012	Connections made with DPI charter contact IMA attends WMA conference to announce intent to become a charter school in Madison and develop connections to support vision 3 year lease signed for current facility
April 2012	1023 filed State licensing process started for children under age 5
May 2012	Renovations started on current facility IMA staff hired and sent to Montessori training
August 2012	High demand for Montessori Toddler program (ages 1-3) communicated from Madison parents Renovations continue to open a Toddler Program by September 2012
September 2012	Isthmus Montessori Academy (IMA) opened. This is a private pre-school and elementary

	school providing AMI Montessori education to children ages 1-9.
October 2012	Parents of children enrolled at IMA approach Heads of School regarding plans to develop a Montessori Charter school.
November 2012	Carrie and Melissa spoke with a Charter School expert in Chicago
December 2012	Melissa and Carrie meet with Nancy Schaitel of Sparta schools regarding the charter process. Melissa called MMSD interim superintendent to set-up a meeting
January 2013	Melissa and Carrie present vision and mission to MMSD interim superintendent - very positive meeting!
February 2013	Meeting with Dylan Pauly regarding charter process for MMSD Gather support via public petition
March 2013	Communicate about goals to become a charter school at the Natural Parenting Expo
Spring 2013	Attend MMSD Board meetings
Fall 2013	Further consultation from WMA Board regarding charter process in Madison. Continued public, monthly Parent Education meetings where goals to become a charter school are shared -- response overwhelmingly positive Continued consultation from WMA
January 2014	Continue to attend MMSD school board meetings Speak to MMSD Superintendent about vision of IMA Speak to MMSD board members about vision of IMA Charter planning committee meetings Continued consultation from WMA
February 2014	Meeting with Dylan Pauly to receive information regarding updated MMSD charter process Meeting with charter planning committee Continued consultation from WMA Meeting with consultant from WISN IMA submits Initial Planning Grant Application to MMSD School Board Beginning stages of raising public awareness and support for the charter

Enrollment History:

August 2012	22 children were enrolled upon opening
September 2012	24 children enrolled at the start of the school year
May 2013	28 with waiting lists at the Toddler Program level
August 2013	7 children enrolled at the Elementary Program level (grades 1-3)
September 2013	33 children at start of second school year
December 2013	37 children with waiting lists at the Toddler Program and Primary Program levels, and significant interest at the Elementary and Junior High Program Levels

Community support has been growing ever since conversations began between a few passionate parents and educators in September of 2011. We feel positively about gaining district support, and IMA firmly believes that the development of a Montessori Charter School not only has the strong potential to fill existing achievement gaps but also to ignite the curriculum advancement and peer collaboration throughout the district.

Additional plans and actions are needed to open as a Montessori Charter School in the fall of 2015. These plans have been noted in the planning schedule of the 9600 form that is included with our grant.

2. Equal Access (Admissions and Lottery)

Provide a description of how your plan will assure equal access for all students regardless of gender, race, national origin, color, disability or age factors.

Provide a description of how students with disabilities will be served.

Provide a description of how students and parents in the community will be informed about the charter school and given an equal opportunity to attend.

Describe the admissions policy and any qualifications for admission that will be established.

Provide a description of a random lottery process to be implemented if more students apply for admission than can be accommodated in the charter school.

IMA will use a lottery system for open spots as an instrumentality of MMSD. If the number of prospective student applicants exceeds the number of available enrollment slots, an annual lottery shall ensue. Completed applications must be turned in 72 hours before lottery is held. Siblings of IMA students are exempt as applicants from the lottery process and are guaranteed admission so long as their applications are submitted in a timely manner. After all of the available enrollment spots are filled, random selection will continue to establish a wait list. After soliciting applications from students in MMSD, open enrollment students per the Wisconsin Open Enrollment law will be considered if there are vacancies. If a vacant enrollment slot does not exist, the student can participate in the May lottery and accept a place on the waiting list.

As a part of our non-discriminatory policy posted on our website, school literature, school applications and enrollment agreements; Isthmus Montessori Academy does not discriminate on the basis of race, color, gender, religion, disability, sexual orientation, national and/or ethnic origin in the admissions process, its educational policies, programs, and activities, tuition assistance, or employment.

IMA is open to all students. Children who have different abilities will be served with special consideration for academic, social, emotional, physical, and psychological needs just as all children will be at Isthmus Montessori Academy. If the person attending IMA is a student who is differently-abled, the student will receive their appropriate services identified in their Individualized Education Plan (IEP). Prior to beginning the first day of classes at IMA, a student with an IEP will have an IEP meeting in which the IEP team will discuss and determine the appropriateness of placement and services in IMA. The IEP team will identify the supports needed to ensure student success. Every effort will be made to involve the following participants at the IEP meeting preceding the student's entrance into IMA: student, parent, special educator and regular education teacher, IMA staff member, IMA governance board member. Ten percent of IMA's current families have children with special needs which are being met by the school along with outside services.

Prior to January 1st of each year, all parents of 4K-12th graders in the MMSD shall receive literature regarding IMA. IMA representatives will hold information sessions at least three times per year. No student will be denied an opportunity to complete an application.

Assurances

As required by section 427 of the General Education Provisions Act (GEPA), describe proposed steps the grantee will take to ensure equitable access to, and participation in, the charter school. *(The statute, which allows applicants discretion in developing the required description, highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age.)*

In your description, you may use local circumstances to determine the extent to which these or other barriers prevent equitable participation by students, teachers, parents, or other community members. The description need not be lengthy, but it should include a **clear and succinct description of how the applicant plans to address those barriers that are applicable to its circumstances.**

Provide an assurance that the charter school will not charge tuition.

Provide an assurance that the charter school will be nonsectarian.

It is essential to IMA's mission that the school is accessible to children of all races, socioeconomic levels and abilities. One barrier we can anticipate is a potential lack of parent knowledge about the program and a potential lack of parent involvement due to a variety of possible factors. In order to ensure that parents and advocates are

aware of IMA's admissions and lottery system, special efforts will be made to reach out to a diverse community. We intend to meet with special education teachers and school psychologists in surrounding neighborhood schools to help them determine if there are students who may benefit from attendance at IMA. We will make special marketing efforts to communities with families of at-risk children. We intend to assist parents of these children through this process of applying. One potential partnership is through Big Brothers and Big Sisters where referrals to this organization come from within the school system.

IMA will NOT charge tuition for children in the 4K-12th grade programs.

IMA is and will always remain nonsectarian.

The Budget

Planning grants for 2014-15 are capped at \$150,000.

The charter school federal funds budget should relate directly to the planning grant narrative by allocating costs to the specific outcomes and activities to be completed in the planning process. Be sure to coordinate the budget with the **Local Plan For Use of Discretionary Funds (Section VII-A of the planning subgrant application form PI-9600-P)**

The following questions must be completed:

1. Describe the methods by which controls over expenditures and records of expenditures will be maintained.

As an instrumentality of MMSD, IMA will follow all district financial, accounting, auditing, and purchasing policies and procedures. The charter school will be allocated funds, including federal discretionary fund and grants, in a manner consistent with other district schools. IMA will actively pursue applicable grants, donations, and fundraising activities. School district policies and accounting procedures will be followed for each of these activities to assure appropriate monitoring and reporting. Separate accounts will be set up for IMA under the control of the charter governance or designee. An annual report including financial and program aspects of the charter school will be submitted to the school board and available to the public each year.

2. Provide a plan on how the school's innovative offerings **including professional development** will be sustained and continued after the charter school grant expires.

An IMA educator values statement of practice is to enjoy working and learning with children, families, and community. IMA is a vibrant and inspiring environment to educate and guide each child to reaching his or her fullest potential. IMA is currently founded upon and will maintain a school culture of dedication, passion for learning, and developing peaceful relationships, attracting and retaining high quality educators. After the initial implementation year of the charter grant, the IMA Governance Council will have the ability to raise at least \$6,000 each year to allocate specifically for professional development.

3. Complete the Budget Summary (VII-B-Phase I and VII-B-Phase II) in the planning subgrant application form PI-9600-P. The Phase I budget should reflect up to 50% of the total grant. Phase I may not include supplies or equipment for the new charter school, except HDVC equipment. Phase II funds will not be released until the DPI has received documentation of non-stock corporation status and received the charter school contract.

Attached

4. Please use the budget worksheets you'll find under each grant type on the charter school grant information page (http://sms.dpi.wi.gov/sms_cs_grant_info) to indicate the total projected cost of operating the charter school for each of the first five years. (Note: the budget worksheets should include all expenditures and revenues from state, local, federal and other funds including the anticipated federal charter school grant funds. **Attach the expenditures and**

revenues worksheets to the application and designate the year to which they apply. ONLY THE EXPENSE AND REVENUE WORKSHEETS MUST BE INCLUDED IN THE APPLICATION SUBMITTED TO DPI.

Allowable Costs Guidelines: Charter School Program grant funds may not be used for school year salary and fringe benefits for the instruction of students, but may be used for staff development and extended contracts. Applicants are urged to contact DPI to ask about questionable items prior to submitting a proposal. See http://sms.dpi.wi.gov/files/sms/doc/cs_expenditures.doc for a more detailed list.

The following are allowable costs under the planning grant:

- a. Professional development of teachers, administrators and instructional aides who work in the charter school.
- b. Payment of reasonable and necessary mileage, meals, lodging, and other expenses for persons engaged in the charter school planning process.
- c. Orientation/training of persons involved in the development of the charter school proposal.
- d. Payment of consultant fees and extended contract expenses for staff associated with the planning process.
- e. Payment of extended contracts for curriculum and policy development related specifically to charter school startup.
- f. Acquisition of necessary educational materials and educational supplies.
- g. Site visits to other charter schools and associated costs.
- h. Conference or workshop registration fees.
- i. Attorney fees are limited to \$15,000 for the thirty-six (36) month period to cover Planning, Initial Implementation, and Implementation Renewal grants. If not applying for a Planning Grant, then \$10,000 is available during Implementation and Implementation Renewal Grant phases.
- j. Allocation of three percent (3%) of the total grant award to the Wisconsin Innovative Schools Network (WISN) or a similar charter school network.
- k. The cost of acquiring high-definition video conferencing (HDVC) equipment.

5 Year Projected Costs – Revenues and Expenditures – Attached

In Phase I of the local plan for use of discretionary funds for instruction, \$4,000 is budgeted for Montessori consultations and in-services. For support services, \$1,000 in funds is planned to pay trained substitute teachers for classroom teaching when heads of school will need to be away during the planning grant year at IMA. To hire consultants and to enroll already-trained teachers in the AMI-USA Refresher Course held in February of 2015, \$2,500 is budgeted. \$80,000 is necessary to send MMSD teachers to become AMI-accredited Montessori guides.

In Phase II, the lion's share of the local plan for the use of discretionary funds for instruction will be used to purchase new Montessori materials for six classrooms. IMA has a history of shopping carefully for materials and all the beautiful trays, clothes and other cultural materials. By repurposing, repairing and hand making many pieces of lessons, we have budgeted \$17,000 per classroom for the full complement of materials. The total for Non-capital objects in the local plan will be \$102,000. The next largest expenditure will be for capitol objects equipment. With \$8,000 per classroom allocated for furniture, the total cost in the local plan will be \$48,000.

Appendix A
Isthmus Montessori Academy Charter School Expenses
Annual Five Year Projections

Line	ITEM	TOTAL COST Year 1 (2015- 2016)	TOTAL COST Year 2 (2016- 2017)	TOTAL COST Year 3 (2017- 2018)	TOTAL COST Year 4 (2018- 2019)	TOTAL COST Year 5 (2019- 2020)
	SALARIES AND WAGES					
1	ADMINISTRATIVE STAFF SALARIES AND WAGES	\$ 156,120	\$ 156,354	\$ 156,589	\$ 156,824	\$ 157,059
2	CLASSROOM STAFF SALARIES & WAGES	\$ 385,920	\$ 483,490	\$ 604,850	\$ 667,635	\$ 702,420
3	EXTENDED CONTRACT-STAFF SALARY AND WAGES					
4	BUILDING MAINTENANCE STAFF SALARIES AND WAGES	\$ 30,000	\$ 30,045	\$ 30,090	\$ 30,135	\$ 30,180
5	SECURITY STAFF SALARIES AND WAGES					
6	FOOD SERVICES STAFF SALARIES AND WAGES	\$ 30,420	\$ 30,420	\$ 45,630	\$ 45,630	\$ 60,840
7	PUPIL TRANSPORTATION STAFF SALARIES AND WAGES					
8	TOTAL SALARIES AND WAGES	\$ 602,460	\$ 700,309	\$ 837,159	\$ 900,224	\$ 950,499

	FICA AND MEDICARE TAXES					
9	ADMINISTRATIVE STAFF FICA & MEDICARE TAXES	\$ 11,943	\$ 11,961	\$ 11,979	\$ 11,997	\$ 12,015
10	CLASSROOM STAFF FICA & MEDICARE TAXES	\$ 29,523	\$ 36,987	\$ 46,271	\$ 51,074	\$ 53,735
3	EXTENDED CONTRACT-STAFF FICA & MEDICARE TAXES					
11	BUILDING MAINTENANCE STAFF FICA & MEDICARE TAXES	\$ 2,295	\$ 2,298	\$ 2,302	\$ 2,305	\$ 2,309
12	SECURITY STAFF FICA & MEDICARE TAXES					
13	FOOD SERVICES STAFF FICA & MEDICARE TAXES	\$ 2,327	\$ 2,327	\$ 3,491	\$ 3,491	\$ 4,654
14	PUPIL TRANSPORTATION STAFF FICA & MEDICARE TAXES					
15	OTHER STAFF FICA & MEDICARE TAXES					
16	TOTAL FICA AND MEDICARE TAXES	\$ 46,088	\$ 53,574	\$ 64,043	\$ 68,867	\$ 72,713

	UNEMPLOYMENT TAXES					
17	ADMINISTRATIVE STAFF UNEMPLOYMENT TAXES	\$ 221	\$ 221	\$ 221	\$ 221	\$ 221
18	CLASSROOM STAFF UNEMPLOYMENT TAXES	\$ 945	\$ 1,260	\$ 1,449	\$ 1,575	\$ 1,701
19	BUILDING MAINTENANCE STAFF UNEMPLOYMENT TAXES	\$ 63	\$ 63	\$ 63	\$ 63	\$ 63
20	SECURITY STAFF UNEMPLOYMENT TAXES					
21	FOOD SERVICES STAFF UNEMPLOYMENT TAX & PAYMENTS	\$ 126	\$ 126	\$ 189	\$ 189	\$ 252
22	PUPIL TRANSPORTATION STAFF UNEMPLOYMENT TAXES					
23	OTHER STAFF UNEMPLOYMENT TAXES					
24	TOTAL UNEMPLOYMENT TAXES	\$ 1,355	\$ 1,670	\$ 1,922	\$ 2,048	\$ 2,237

	EMPLOYER PAID BENEFITS					
25	ADMINISTRATIVE STAFF EMPLOYER PAID BENEFITS	\$ 35,390	\$ 35,391	\$ 35,391	\$ 35,392	\$ 35,393
26	CLASSROOM STAFF EMPLOYER PAID BENEFITS	\$ 150,965	\$ 201,209	\$ 231,512	\$ 251,669	\$ 271,756
27	BUILDING MAINTENANCE EMPLOYER PAID BENEFITS	\$ 10,075	\$ 10,075	\$ 10,075	\$ 10,075	\$ 10,075

Appendix A

28	SECURITY STAFF EMPLOYER PAID BENEFITS		\$	20,076	\$	20,076	\$	30,114	\$	30,114	\$	40,073
29	FOOD SERVICES STAFF EMPLOYER PAID BENEFITS											
30	PUPIL TRANSPORTATION STAFF EMPLOYER PAID BENEFITS											
31	OTHER STAFF EMPLOYER PAID BENEFITS											
32	TOTAL EMPLOYER PAID BENEFITS		\$	216,506	\$	266,751	\$	307,093	\$	327,250	\$	357,297
CONTRACTED PROFESSIONAL SERVICES												
33	ACCOUNTING SERVICES		\$	2,400	\$	2,400	\$	2,400	\$	2,400	\$	2,400
	IDENTIFY NAME OF ACCOUNTING SERVICES PROVIDER BELOW											
33a												
34	INDEPENDENT AUDITING SERVICES											
	IDENTIFY NAME OF INDEPENDENT AUDITING SERVICES PROVIDER BELOW											
34a												
35	EDUCATIONAL CONSULTANT SERVICES		\$	1,000	\$	1,000	\$	1,000	\$	1,000	\$	1,000
36	LEGAL SERVICES		\$	5,000	\$	5,000	\$	5,000	\$	5,000	\$	5,000
37	OTHER PROFESSIONAL SERVICES											
38	TOTAL CONTRACTED PROFESSIONAL SERVICES		\$	8,400	\$	8,400	\$	8,400	\$	8,400	\$	8,400
Line	ITEM											
PURCHASED OPERATIONAL SERVICES												
39	TELEPHONE		\$	3,600	\$	3,600	\$	3,600	\$	3,600	\$	3,600
40	INTERNET ACCESS		\$	10,000	\$	10,000	\$	10,000	\$	10,000	\$	10,000
41	ELECTRICITY AND GAS		\$	36,000	\$	36,000	\$	36,000	\$	36,000	\$	36,000
42												
43	EQUIPMENT MAINTAINANCE AND REPAIR		\$	1,000	\$	1,000	\$	1,000	\$	1,000	\$	1,000
44	BUILDING MAINTENANCE		\$	10,000	\$	10,000	\$	10,000	\$	10,000	\$	10,000
45	BUILDING REPAIR		\$	15,000	\$	15,000	\$	15,000	\$	15,000	\$	15,000
46	OTHER BUILDING OPERATION EXPENSE											
47	FOOD SERVICE PREPARATION AND MEALS		\$	117,500	\$	162,900	\$	201,600	\$	250,200	\$	273,600
48	SECURITY SERVICES											
49	CONTRACTOR OPERATED PUPIL TRANSPORTATION SERVICES		\$	27,510	\$	38,010	\$	47,040	\$	58,380	\$	63,840
50	PUPIL TRANSPORTATION VEHICLE MAINTENANCE AND REPAIR											
51	OTHER VEHICLE MAINTENANCE AND REPAIR											
52	OTHER PURCHASED OPERATIONAL SERVICES											
53	TOTAL PURCHASED OPERATIONAL SERVICES		\$	220,610	\$	276,510	\$	324,240	\$	384,180	\$	413,040

Appendix A

	FACILITY OCCUPANCY CHARGE		\$	150,000	\$	150,225	\$	150,450	\$	150,676	\$	150,902
54	FACILITY RENT											
	<i>IDENTIFY TO WHOM RENT IS PAID (Enter on line below)</i>											
55	TOTAL FACILITY OCCUPANCY CHARGE		\$	150,000	\$	150,225	\$	150,450	\$	150,676	\$	150,902

SUPPLIES								
56	ADMINISTRATIVE SUPPLIES	\$	1,000	\$	1,000	\$	1,000	\$ 1,000
57	CLASSROOM SUPPLIES	\$	68,000	\$	34,000	\$	34,000	\$ 34,000
58	BUILDING MAINTENANCE SUPPLIES	\$	1,500	\$	500	\$	500	\$ 500
59	SECURITY OPERATIONS SUPPLIES							
60	FOOD SERVICE SUPPLIES	\$	25,000	\$	3,000	\$	3,000	\$ 3,000
61	PUPIL TRANSPORTATION SUPPLIES							
62	OTHER SUPPLIES							
63	TOTAL SUPPLIES	\$	95,500	\$	38,500	\$	38,500	\$ 38,500

	INSURANCE					
64	INSURANCE		\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000
65	TOTAL INSURANCE		\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00

	OTHER								
66	OTHER EXPENSES (ATTACH ITEMIZATION IF AMOUNT ON LINE IS OVER \$500)								
67	TOTAL OTHER	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
68	INTEREST EXPENSE CURRENT CASH FLOW DEBT								
69	TOTAL OPERATING EXPENSES	\$ 1,360,919	\$ 1,515,939	\$ 1,751,807	\$ 1,900,145	\$ 2,013,588			

Appendix B
Isthmus Montessori Academy Charter School Revenues
Annual Five Year Projections

REVENUE ITEMS	TOTAL REVENUES Year 1	TOTAL REVENUES Year 2	TOTAL REVENUES Year 3	TOTAL REVENUES Year 4	TOTAL REVENUES Year 5
CONTRACT AMOUNT & CONTRIBUTIONS					
CONTRACT AMOUNT	\$ 890,880	\$ 1,212,700	\$ 1,523,200	\$ 1,890,400	\$ 2,067,200
OPERATORS' SUBSIDY or CONTRIBUTION					
FUND RAISING OR EXTERNAL CONTRIBUTIONS	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000
TOTAL TUITION & CONTRIBUTIONS	\$ 950,880	\$ 1,272,700	\$ 1,583,200	\$ 1,950,400	\$ 2,127,200
SCHOOL FEES					
BOOK & SUPPLY FEES	\$ 4,585	\$ 6,335	\$ 7,840	\$ 9,730	\$ 10,640
PERSONAL USE ITEMS					
SOCIAL AND EXTRA-CURRICULAR FEES	\$ 2,620	\$ 3,620	\$ 4,480	\$ 5,560	\$ 6,080
TOTAL SCHOOL FEES	\$ 7,205	\$ 9,955	\$ 12,320	\$ 15,290	\$ 16,720
FOOD SERVICE REVENUES					
MEAL AND OTHER FOOD SERVICE CHARGES	\$ 43,875	\$ 51,795	\$ 67,374	\$ 97,479	\$ 107,514
GOVERNMENT FUNDED FOOD SERVICE ASSISTANCE	\$ 94,320	\$ 130,320	\$ 161,280	\$ 200,160	\$ 218,880
TOTAL FOOD SERVICE REVENUES	\$ 138,195	\$ 182,115	\$ 228,654	\$ 297,639	\$ 326,394
OTHER GOVERNMENT PAYMENTS: List Below					
Title 1 (\$240 per MMSD pupil based on 2013 payout)	\$31,440	\$ 43,440	\$ 53,760	\$ 66,720	\$ 72,960
Title 2 (\$40 per student)	\$ 5,240	\$ 7,240	\$ 8,960	\$ 11,120	\$ 12,160
TOTAL OTHER GOVERNMENT PAYMENTS	\$ 36,680	\$ 50,680	\$ 62,720	\$ 77,840	\$ 85,120
INVESTMENT INCOME					
RENTAL OF FACILITIES TO OTHERS					
OTHER: Describe Below					
DPI Start Up Grant	\$ 150,000				
Lowes Farm to School, Brightmeyer Grant	\$ 80,000				
TOTAL OTHER	\$ 230,000	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUES	\$ 1,362,960	\$ 1,515,450	\$ 1,886,894	\$ 2,341,169	\$ 2,555,434



Office of the Common Council

Alder Ledell Zellers, Second District

City-County Building, Room 417
210 Martin Luther King, Jr. Blvd.
Madison, Wisconsin 53703-3345

OFFICE 608.266.4071

HOME 608.417.9521

FAX 608.267.8669

district2@cityofmadison.com

www.cityofmadison.com/council/district2

February 11, 2014

Madison Metropolitan School District Board
545 West Dayton Street
Madison, WI 53703

Dear Board members,

I support the planning grant application for the Isthmus Montessori Academy to help it achieve its vision of being accessible to all children and families of the Madison area by becoming a part of the public school district.

Having another school in district 2 or very close by will support the city's goal of having the area be family friendly. Schools are crucial to attracting and retaining families to our central city. I believe that the Montessori curriculum model is academically rigorous while being sensitive to the developmental needs of individual students.

Thank you for your consideration.

Sincerely,

Ledell Zellers
District 2 Alder



11 February 2014

To: Ms. Mary Burke
Mr. James Howard
Mr. Ed Hughes
Mr. Dean Loumos
Mr. TJ Mertz
Ms. Marj Passman
Ms. Arlene Silveira

Dear Madison Board of Education Members,

I am writing in support of bringing Isthmus Montessori Academy into the Madison Metropolitan School District as a public option for families in the Madison area.

As a long-time Madison healthcare provider for hundreds of families with school-aged children throughout the district, I am deeply interested in educational options and policies that affect families I work with. The majority of my families carefully research schools and educational models for their children. A great number choose Montessori education.

I have had the privilege of following the development and operations of Isthmus Montessori Academy through my role as IMA Board member, as well as through the experiences of children and parents with whom I work and who attend this stellar school. It is a school that nurtures the whole family as it educates and sustains, employing the highest caliber teachers and highest quality materials.

Bringing Isthmus Montessori Academy into the MMSD as a public option could only serve to further the district mission and standards. Please support this enriching opportunity for our community.

Thank you for your consideration.

Sincerely,

Ingrid Andersson, CNM, MSN

ARO EBERLE ARCHITECTS

116 King Street, Suite 202
608 204-7464

Madison, WI 53703
Aroeberle.com

February 11, 2014

Board of Education
Madison Metropolitan School District
545 W. Dayton
Madison, WI 53703

Dear Madison Board of Education Members,

As a business owner, I encourage our employees and their families to live in the city close to our workplace. One important factor for where our professionals choose to live involves having good schools in their neighborhood, and the District has many great schools. Many of our employees choose to live, or desire to live, in the central/east area. Isthmus Montessori Academy as an educational choice for parents and community members within the central/east area would help provide an additional alternative educational option for our employee's families near their place of work, and I believe would help to attract families to live in areas close to the school. Anecdotally we hear that some Nuestro Mundo families are moving to Monona following the relocation of that school in order to be closer to the school their children attend.

We support IMA's planning grant application and ask that the Board approve the application.

Sincerely,



Aro Eberle Architects, Inc.
Matthew Aro, AIA

February 11, 2014

ISTHMUS MONTESSORI ACADEMY
225 North Sherman Avenue
Madison, WI 53704

To whom it may concern:

As a neighbor, taxpayer, parent, and grandparent, I am writing this note in support of the Isthmus Montessori Academy (IMA) and their goal to become part of the Madison Public School system.

Two years ago we had an empty building, an eyesore depicting economic decline in our neighborhood. A lot of vision, planning, and hard work went in to the transformation of an unused building into the IMA - a place of positive energy with fun and unique learning experiences.

As IMA's first volunteer, it's been exciting to watch IMA evolve and grow. As a neighbor, it's been exciting to see and hear happy children in the neighborhood. And, as a proponent of lifelong learning who started out in a 2-room school, I appreciate a small neighborhood hub of education available to all children.

Becoming part of the Madison school system would open the door to more children having access to this type of personalized education, eliminating many of the financial concerns associated with alternative educational opportunities. Children are our future, and their education should be important to all of us.

Sincerely,

A handwritten signature in cursive script, appearing to read "AnnMarie Johnson".

AnnMarie Johnson
1714 Northfield Place
Madison, WI 53704-4628

Terrence and Melissa Grimm
2202 Lakeland Avenue
Madison, WI 53704

February 10, 2014

To Whom It May Concern:

We are writing this letter in support of Isthmus Montessori Academy (IMA) becoming a public Montessori school. We were introduced to the Montessori method when we lived in St. Paul, MN and were fortunate enough to have sent our oldest daughter to a public Montessori school for her pre-K year (having no idea what Montessori was and always assuming we would send our kids to a public school). We learned a tremendous amount about the Montessori Method that year and were convinced that it would be an exceptional experience to give our three children. After deciding to move to Madison in the summer, 2012, our main concern was finding a Montessori school. We feel incredibly lucky to have found IMA since up until that year there were no Montessori elementary schools on the east side of Madison.

Being a part of the IMA community has been incredible. Our entire family continues to learn and grow with the school. We have every intention of sending our children to IMA through middle and high school if it is available. We are repeatedly impressed with the dedication of the Heads of School, Melissa Droessler and Carrie Marlette to serve our children and the community. We cannot say enough about them and are so pleased about the direction that they are taking the school. Our wish is that IMA could be a public school, available to children of all economic backgrounds.

Sincerely,

Terrence and Melissa Grimm

February 10, 2014

To Whom It May Concern:

I am writing to lend my full support to the development of a public charter Montessori school within the Madison Metropolitan School District. As a parent who has had children taught both traditionally and via the Montessori Method I can attest first hand to the advantages that seem to be present in a model such as Isthmus Montessori Academy is advocating for. To me, the truth of the matter is that the children that will most benefit from this modality of educational method will likely never have the opportunity to experience it unless we can find a way to offer it as a public option. The cost of attending a private school is obviously substantial and although there are some funds available to lower income households there is also the issue of awareness of such funding. If approved and supported by MMSD it would seem that, much like the public Montessori's in the Milwaukee Public School System, a whole new world of opportunity would be opened up to students that could truly thrive in such a system whereas they are languishing in a system that is not prepared to meet their individual needs. As I have stated, I have witnessed firsthand what is it to have children in both environments – from these experiences I can honestly say that the successes that I have witnessed in my own children from being allowed to follow their own innate curiosities has driven them to be more successful learners as well as avid critical thinkers. I greatly appreciate the movement in the education system to reform and improve upon itself; I can only see this measure (to bring a Montessori Charter to Madison) as the next step in the natural progression of order.

If needed I would be happy to answer any questions you may have regarding my experiences with this type of education (as I have had children in a variety of educational models). I can be reached at 608-444-7761. Also, I would like to thank you for considering this endeavor as a parent of a Blackhawk and East High School graduate I am truly vested in our Madison School District; with two more wonderful girls heading into our school system I am excited to see what our future holds.

Sincerely,

Robin Sereno

A handwritten signature in cursive script, appearing to read "Robin Sereno".