MPS Conversion Charter Application - November 2019

New Charter Application #000480

Davis Elementary, Nixon Elementary, Bellingrath Middle

Submitted To:
Office of Curriculum and Instruction
Montgomery Public Schools
307 S. Decatur St.
Montgomery, AL 36102-1991

Phone: 334-223-6700
Fax: 334-223-6701

Submitted By:
Ann Sikes
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A. School Information

Open Date: September 16, 2019
Proposed Name: Davis Elementary, Nixon Elementary, Bellingrath Middle
School Type: Elementary / Middle
Grade Levels: [PK, K, 1, 2, 3, 4, 5, 6]
School District: Montgomery Public Schools
Neighborhood / Community: Montgomery
Organization Type: Non-profit Corporation
Sponsoring Entity: Non-profit Organization
Address: 5950 Carmichael Place, Suite 101 Montgomery, Alabama 36117
Phone: 334-647-1700
Fax: www.montgomeryed.org
Web Site: Standard - 182 instructional days
Calendar Type: Montgomery Education Foundation (Other)

B. Primary Contact Person

Name: Ann Sikes
Mailing Address: 334-221-1702
Mobile Phone: 334-647-1700
Alternate Phone: ann@montgomeryed.org
Email: Montgomery Education Foundation

C. Attendance Projections

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<tr>
<td>Borden, Dave</td>
<td>Board Vice Chairperson</td>
<td>P: 334-265-9605 M: <a href="mailto:dborden@abcpa.com">dborden@abcpa.com</a></td>
<td>Aldridge Borden CPA</td>
</tr>
<tr>
<td>Hankins, Paul</td>
<td>Board Chairperson</td>
<td>P: 334-356-2220 M: <a href="mailto:hankinsp@knology.net">hankinsp@knology.net</a></td>
<td>Alabama Independent Colleges Association</td>
</tr>
<tr>
<td>Love, Jay</td>
<td>Board Treasurer</td>
<td>P: 334-356-7828 M: <a href="mailto:jlove32376@aol.com">jlove32376@aol.com</a></td>
<td>Self - Governmental Relations Specialist</td>
</tr>
<tr>
<td>Novak, Caroline</td>
<td>Board Member</td>
<td>P: M: (334) 451-4110 E: <a href="mailto:caroline@aplusala.org">caroline@aplusala.org</a></td>
<td>A+ Education Partnership</td>
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### E. Start-up Team Members

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<tr>
<td>Campbell, Nash</td>
<td>Legal Advisor</td>
<td>P: 251-476-2400 M: <a href="mailto:nash@cdcfirm.com">nash@cdcfirm.com</a></td>
<td>Campbell, Duke &amp; Campbell Campbell</td>
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<tr>
<td>Hampton, Justin</td>
<td>Authorized Representative</td>
<td>P: 334-647-1700 M: 3346471700 E: <a href="mailto:justin@montgomeryed.org">justin@montgomeryed.org</a></td>
<td>Montgomery Education Foundation</td>
</tr>
<tr>
<td>Reynolds, Chris</td>
<td>Consultant</td>
<td>P: M: 615-870-4995 E: <a href="mailto:chrisreynolds44@gmail.com">chrisreynolds44@gmail.com</a></td>
<td>Poplar Advisors LLC</td>
</tr>
<tr>
<td>Sikes, Ann</td>
<td>Authorized Representative</td>
<td>P: 334-647-1700 M: 334-221-1702 E: <a href="mailto:ann@montgomeryed.org">ann@montgomeryed.org</a></td>
<td>Montgomery Education Foundation</td>
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INTRODUCTION

1. Introduction

Section Evaluation

– Not Rated –  

– No Final Rating –

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Attachments
Section 1: Introduction

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1. Evaluation Process and Timeline

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**Attachments**

**Section 1: Evaluation Process and Timeline**

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1. Application Overview

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**Attachments**

**Section 1: Application Overview**

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## EXECUTIVE SUMMARY

1. Executive Summary

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**Overview**

Montgomery Education Foundation, a 501 c 3 nonpartisan champion for public education, is pleased to respond to the request for proposal for charter schools released by Montgomery Public Schools. One of our core values at MEF is to work for the improvement in the quality of public education, and on behalf of our board and in service to the students and families in Montgomery, we are honored to have the opportunity to extend our impact on public education with this proposal.

The strategic intent of this proposal, known as MEF Conversion Schools, uses an existing feeder pattern structure to transform public education in a targeted community and set an example for what is possible. This proposal seeks approval of three separate charters to cover the conversion of the following schools: Davis Elementary, Nixon Elementary, and Bellingrath Middle. While only the elementary and middle schools are to be considered at this time, information regarding conversion of the high school in this pattern is included or noted in some parts of the application to provide a complete picture of the possible alignment.

MEF will recruit and contract with experienced and high capacity operators to manage each school within the feeder pattern. All students will remain eligible to attend the same schools they are zoned for with proof of address being the only requirement for enrollment. The strategy is designed to support existing schools and neighborhoods, leverage existing community strengths, minimize disruption, and provide an innovative alternative to the status quo. By design, the partnership structure ensures normal LEA supports like transportation, food service, facilities, maintenance, clinical services, child find and high needs special education services, etc. will continue without interruption so the charter school can focus on school culture, community outreach, teacher training, and instructional and academic priorities.

The design for MEF Conversion Schools is proposed as a partnership with Montgomery Public Schools as one part of MPS’s larger strategy to improve performance outcomes for students in Montgomery, Alabama, particularly the Lanier High School feeder pattern. It begins with an elementary and possible middle school conversion in 2020 followed by another elementary school in 2021. It is anticipated that all three schools will be converted no later than 2022.
The proposed schools are:

- Davis Elementary
- Nixon Elementary
- Bellingrath Middle

The MEF Conversion Schools strategy is in response to the Montgomery Public Schools Request for Conversion Schools Proposals.

Our intent is to transform a group of schools in a feeder pattern, beginning in elementary school, and ensure families have access to quality schools in all grades. Over time, the improvements in the elementary and middle schools will manifest at the high school in better prepared students able to leverage rigorous content and college and career preparation at levels significantly improved over current levels.

Contingencies

If approved, MEF is committed to ensuring several readiness to open contingencies are met prior to opening.

1. MEF and Montgomery Public Schools will negotiate a charter contract for each school.
2. Upon execution of a charter contract, MEF will execute a contract with a nonprofit entity for management of each school by February 28th of the year in which school starts.

Entity Structure

MEF will hold the charter for each conversion school and will be legally responsible for adherence to state law and school performance. The MEF board will include at least 20% parent board membership (as required by Alabama law) and will approve the management contract for each provider selected to manage the school.

The Entity Structure Chart attached to this section depicts this structure.

School Operators

While MEF is prepared to operate one or more schools, our primary intention is to recruit and attract charter school operators to participate in transforming the outcomes of the Lanier feeder pattern and contribute additional expertise, ideas, and talent across Montgomery. We have actively recruited operators to join with us in executing our strategy. We are pleased to report that we have secured letters of intent from organizations with tremendous capacity and experience.

- Faulkner University has agreed to join with MEF and has indicated their intent to operate, and transform Davis Elementary, a school they have been working with for several years and where relationships with teachers and the community currently exist. Faulkner’s school of education, deep roots in Montgomery, and enormous operating capacity provide a well-known higher education institution as a key partner in this important work.
- Nationally recognized charter network, Democracy Prep (22 schools and over 7,000 students) has also provided a letter of intent to plan, prepare and launch a k-12 continuum of schools within the Lanier feeder pattern: Nixon Elementary, Bellingrath Middle and Lanier High, each in successive years. Democracy Prep is well known for their commitment to serving low income communities from Harlem, to Baton Rouge, to Las Vegas, and most recently San Antonio.

Aligning Schools and Operator(s)

While multiple schools and possible multiple operators is a tremendous strength as it promotes cross collaboration and extensive learning opportunities it also requires some coordination to leverage best practices in certain key areas. A summary of some of those key areas are:

- Each school model/operator must ensure the effective implementation of the five essential elements of MEF Conversion Schools (see below)
• Each school will collaborate on hiring (our recruiting website is already live and applications are being accepted and is scalable to serve all schools).
• Summer teacher training and professional development will be done collaboratively and will include teachers at all schools in the feeder pattern and be open to teachers in schools that have yet to be converted.
• The same nationally normed assessments (NWEA/MAP or similar) will be given by each operator.
• Each school is expected to use the curriculum presented in this proposal or a similarly rigorous curriculum aligned to Alabama standards.
• Each school will be bound by a contract with MEF to operate the school and be subject to an annual performance evaluation by MEF.

This strategy will necessarily require deep collaboration with the community and district leadership and MEF values and is fully committed to the collaboration. The extensive resources and experience of a local institution of higher education coupled with the operating expertise of a nationally known charter school network is a great combination we believe will serve Montgomery well. Through their partnership with MEF we see an opportunity to create a just, equitable environment where zip code, race, or economic status no longer determines one’s destiny.

Attachments
Section 1: Executive Summary

1.1   Entity Structure Chart

Notes

Kristy Hatch, 9/23/19 6:28 PM:

Please expand on #2D and provide more information on MEF’s capacity to successfully open and operate the schools identified.

Ann Sikes, 9/23/19 9:06 PM:

MEF will utilize selected providers to manage each school ensuring significant capacity exists to support the school. Please refer to the letters of intent attachment provided by Faulkner University and Democracy Prep as evidence of the capacity of possible partners. Faulkner University is well known for numerous graduate and undergraduate programs and extensive expertise in operations, risk management, professional development, HR, marketing, and facilities management, etc. Democracy Prep, a large national CMO brings a similar strength of support to operations and is well known for their effective centralized management of over 20 schools across the country. Democracy Prep schools have a combined budget in excess of $100 million dollars and they are highly experienced school operators. In addition, Montgomery Education Foundation has a diverse and experienced board and Interim Advisory Committee with significant capacity and qualifications to ensure effective operations of the schools. The senior leaders of the board and president of the foundation will provide direct support and technical assistance to the leadership team of the school to ensure effective implementation of key functions. Specific expertise is provided by the following individuals. Ann Sikes, President of MEF and a skilled nonprofit leader with a proven track record of delivering MEF programs and services to the community for many years. She has extensive experience, hiring, supporting, and coaching staff to meet aggressive goals and in building highly effective, diverse teams. Paul Hankins, Air Force General (Retired), brings performance management, operational and leadership capacity of the highest level. As board chair of MEF his role and influence is significant and his involvement will be an asset to the leadership team. Trey Sippial, Sippial Enterprises, is a commercial real estate broker and entrepreneur with startup experience in running franchise operations and managing business operations for a commercial real estate management firm. His experience in these are directly related to the operational challenges faced in school startup; namely, facilities preparation, staff hiring, general
operations, and financial planning. Chris Reynolds, advisor to MEF, has supported the startup and operations of multiple charter schools in several states. He is a skilled finance and operations expert and was part of the collaborative team that planned, executed, and operated the first conversion school in Tennessee in partnership with the local LEA. The MEF board and Interim Advisory Committee has extremely skilled finance, facilities and real estate development experience and the finance committee of the board will provide advisory support to the school on operations, facilities, finance, security and other matters. In addition, board member Dave Borden is a CPA and former Montgomery County School Board member and will ensure expert technical advice and collaborative communication for any facilities related needs.

**Kristy Hatch, 9/23/19 6:24 PM:**
This plan proposes the opening of three schools. Please state clearly what school the plan intends to open each year.

**Ann Sikes, 9/23/19 9:06 PM:**
We propose to open Davis in 2020, Bellingrath in 2021 and Nixon in 2022. However, we believe it will be important to partner with the district in determining which elementary to open first. This decision should be finalized no later than February 29, 2020.

## 2. Mission and Vision

### Section Evaluation

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### Final Rating

The summary has been provided

**Mission and Vision**

The mission of MEF Conversion Schools is to provide all our students a rigorous educational experience that prepares them for success in college, career, and life. While our work is focused on the Lanier feeder pattern and all families with proof of address in the zone are guaranteed priority enrollment, we also share our mission with students from across the city and elsewhere as space allows. Our mission is focused first and foremost on students, but also recognizes the importance of shared commitment from community, corporate, higher education, and district partners in creating equitable educational opportunities for all children.

The vision of MEF Conversion Schools is to prove the possible. All students, regardless of background, race, or income level have
extraordinary potential, and MEF Conversion Schools looks forward to the day that the performance improvements in the Lanier feeder pattern and elsewhere in Montgomery are not looked upon as surprises, but as expectations. We believe our vision will be realized through a careful and staged approach to tiered school conversion beginning in elementary school and culminating with a k-12 continuum. Working in partnership with the community and local district, our vision includes school cultures that are strong and supportive, family involvement that is deep and broad, and a firm commitment to rigorous instruction and social and emotional learning that is apparent to any visitor. We look forward to continuing to support businesses, higher education institutions, community organizations, and the faith community as they continue to expand their existing partnerships in service to schools. Knowing that Montgomery’s future and the future of its children are directly tied to strong, sustainable public schools that serve all students we are honored to present this collaborative and innovative proposal.

The overview section above directly references the Alabama School Choice and Opportunity Act of 2015 and establishes how aligned this proposal is with the state’s priorities and legislative intent of the law. This proposal and the mission herein is one of partnership and collaboration designed to create sustainable innovations that address the dramatic inequity that currently exists in Montgomery.

**Attachments**

**Section 2: Mission and Vision**

– No Attachments –

**Notes**

**Ann Sikes, 9/24/19 4:07 AM:**
Clarity: The term "entire feeder pattern" refers to the three conversion schools.

**Kristy Hatch, 9/23/19 6:27 PM:**
Provide more information on this section of the question: Align with the purposes of the Alabama School Choice and Student Opportunity Act (Act 2015) and the authorizer's stated priorities for schools

**Ann Sikes, 9/23/19 9:26 PM:**
The MEF Conversion Schools strategy is in direct response to the stated intent of the state intervention strategy, namely the request for charter school proposals issued on January 16, 2017 and maintained on the ALSDE website to "...improve student growth and achievement, to close the achievement gap, to increase the graduation rate, and to increase the number of college and career ready students." This proposal is further supported by the legislative intent of the Alabama School Choice and Opportunity Act of 2016 in which the legislature intends to, "encourage innovative educational ideas that improve student learning for students at all academic levels...., and create public schools with freedom and flexibility in exchange for exceptional results." Our intent is to transform the entire feeder pattern, beginning in elementary school, and ensure families have access to quality schools in all grades. Over time, the improvements in the elementary and middle schools will manifest at the high school level in better prepared students able to leverage rigorous content and college and career preparation at levels significantly improved over current levels.

**Kristy Hatch, 9/23/19 6:27 PM:**
Please provide more information to illustrate what success will look like in the proposed school.

**Ann Sikes, 9/23/19 9:23 PM:**
Sustainable school transformations are not overnight endeavors and require several years to execute well. Success will occur over time and over the term of the charter will include reductions in chronic absenteeism, increases in growth and achievement scores, and ultimately by the end of the charter term growth from an F on the state report card to a D, and eventually to a C. Additionally we will measure success in comparison to other schools of similar demographics in Montgomery and across the state to
show improvement over a relevant cohort of schools. Further, we will look for evidence of success based on students who have had at least three years of enrollment in MEF Conversion schools. As a conversion school we have a commitment to all students but will not have the opportunity to provide a full K-5 or full middle school experience to all students in the first few years. We anticipate students who sustain their enrollment at MEF Conversion Schools will show growth and achievement above those that attend for less than three years.

### 3. Educational Need and Anticipated Student Population

#### Section Evaluation

<table>
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<td>This proposal is focused on a community where the need is extreme and a feeder pattern strategy is required due to the severity of academic challenges across all grades. Working solely at the high school or elementary level is not sufficient and strong linkages between schools are necessary – linkages that ensure consistent design elements, common instructional practices, and the ability to leverage professional development for teachers in all schools. Our strategy involves supporting all grades in schools in a single feeder pattern to produce significant increases in academic readiness in order to transform the 9-12 experience and dramatically improve the graduation rate, ACT outcomes, and college and career readiness of students in the Lanier zone. This work would start with the three schools, Davis, Nixon and Bellingrath to build alignment of performance.</td>
</tr>
<tr>
<td>Academic performance is poor and we do not believe it to be representative of the true potential of the students attending these schools.</td>
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<td>The three schools within the current proposal have the following State Report Card ratings:</td>
</tr>
<tr>
<td>- Davis Elementary School - Rating - F</td>
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<tr>
<td>- Nixon Elementary School - Rating - F</td>
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<tr>
<td>- Bellingrath Middle School - Rating - D</td>
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<tr>
<td>- In addition, Lanier High School - Rating - D</td>
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<tr>
<td>Together, the three schools enroll nearly 1,500 students and our proposal ensures enrollment continuity for all families with proof of</td>
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address in the zone. The vast majority of students and families in the Lanier feeder pattern are African American and economically disadvantaged. There are very few non-Black students and an extremely small percentage of students with English language needs at present (exact numbers for both of these groups are unavailable as they are so small as to result in asterisks in public data). Special education rates range from 10-15% and are similar to other feeder patterns in the city.

The rationale for this proposal is rooted in MEF’s commitment to all students and the commitment to partner with the district as they work to improve low performance across the district. How to initiate and support dramatic improvement in low performing schools is a challenge faced in many communities. At MEF we believe there are many potential solutions, but they must include a strategy for a full k-12 continuum of support. We do not believe the problems faced by many high schools originated in 9th grade, but are more systemic, began much earlier, and require a feeder pattern strategy to address effectively.

Conversion school enrollment rules are uniquely neighborhood friendly, allowing for continuity of enrollment for current students and guaranteed enrollment for families with proof of address in the zone. In the event additional space is available students across the city are able to apply and if oversubscribed will be selected via lottery. Students who may move into the zone during the school year are allowed immediate enrollment, and community outreach and enrollment information are shared with families on a regular basis through our partnership structure with the district enrollment office as well as independent outreach activities each school will conduct.

MEF has worked with and served students and families from each of these school communities and has first-hand experience with the challenges faced by families — and teachers. MEF: Each year thousands of students participate in multiple educational and community and partner-based programs offered by MEF, notably the Dept. of Defense’s STARBASE STEM Program, Brain Forest Summer Academy, and Reading on Wheels. We are deeply connected to the philanthropic and business communities and regularly bring additional resources to serve public education families, whether it is through advocacy, community engagement, or other measures. With our years of experience in serving our community, our demonstrated ability to connect schools with businesses and other organizations, our fundraising experience and our role as a non-partisan champion for kids we are well prepared to understand and serve the Lanier community.

Additionally, we know how critical transportation is to many families, how important access to pre-k supports are, and how important meals, after school programming, etc. are, too. Our partnership model ensures all of these will continue and that essential existing wrap around programming that supports Lanier students and families are able to remain.

### Attachments

**Section 3: Educational Need and Anticipated Student Population**

— No Attachments —

### 4. Community Engagement

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Community Engagement

MEF has extensive relationships in the community and across Montgomery as a result of its commitment to public education, large and diverse board of directors, actual education programming for thousands of Montgomery students, and the partnership with the district to create and facilitate the We C.A.N. Network. These and other efforts have resulted in trusting relationships built over time where parents, teachers, and community members have expressed their desire for higher quality schools and shared their desire for the availability of equitable opportunities for their children. Our Network Nights and our pre-k advocacy support work have brought us close to many families and parents who are struggling with what to do to ensure a quality education for their children. MEF is known for its role in advocating for students and families and its support of district schools, and this has allowed us direct access to families who have concerns about public education in Montgomery. Additionally, the demand for our summer school programs (Brain Forest, for ex.) grows every year and families tell us they want equally effective programming during the regular school year. This application is a direct response to this need and the request for conversion charter school proposals (RFP) issued by the Montgomery County Board of Education.

As a primary example of the work to build parent and community support, MEF, in partnership with Montgomery Public Schools, has developed the We C.A.N. Network – an opportunity for Montgomery citizens to come together for real conversation followed by real action. Our Network Nights are held in schools throughout the district and invite all stakeholders to the table. School leaders, educators, students, parents, local business owners, clergy, and civic leaders share their goals, challenges, progress, and needs with the local community in real-time and space.

In addition to our own organized community events and public forums, MEF has participated in numerous local education forums and group discussions throughout the district, building momentum through collaboration with local community groups and information sessions regarding the effort. Within the past 12 months alone, these efforts include, but are not limited to engagements with:

- Baptist Ministers Union Information Session
- One Montgomery
- Haardt Estates Neighborhood Association
- Leadership Montgomery Legacy Class
- WVAS and WXXN radio interviews
- WAKA and WSFA news interviews
- Montgomery Advertiser Op-eds and Articles
- BONDS
- MGMNXT
- MCBOE Work Session Presentation
- Downtown Business Association Education Forum
- Montgomery Chamber of Commerce Charter School Forum
- Faith in Action Alabama Montgomery - Information Session

These information sessions and forums have been conducted in conjunction with individual meetings with local government officials, clergy, and community influencers in order to inform the conversation surrounding the details of these efforts and raise community awareness. Conversations with State House Representatives, Mayoral and City Council Candidates, Teach for America Executives, and numerous other community leaders have been and will continue to be conducted.

The annual decline in MPS student population is not only an indicator of community support for innovation and education...
alternatives, but serves as statistical evidence for a financial need to stabilize the student population. Being that district schools are funded on a per student basis, the annual attrition of approximately 600 students away from MPS, leaves our already financially restricted schools at an even greater disadvantage in comparison to our more well funded neighboring districts. Our conversion initiative is believed to present the Montgomery community with evidence of MPS’s desire for innovation and present the district with the opportunity to provide an attractive alternative to families that would otherwise exit the district, hence potentially becoming a contributor to stabilizing the MPS student population and the funding dollars that come with that consistent or increased enrollment.

Additionally, we have letters of support (see Letters of Support Attachment) from parents of students who are supportive of our work as well as community leaders, and others from across the county. There is clear evidence of frustration with the status quo, demand for better schools and more choices, and a shared prioritization that quality school choices be close to home. Our conversion school strategy addresses all of those needs, and MEF is optimistic about leveraging our reputation for positive and nonpartisan community engagement on behalf of students.

### Attachments

**Section 4: Community Engagement**

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### Notes

**Kristy Hatch, 9/23/19 6:29 PM:**

Please provide data to show success in MEF’s Brain Forest program.

**Ann Sikes, 9/24/19 2:39 AM:**

Attached to this section are Annual Reports for 2013 - 2018. Each report includes full data for the year. In addition attached is a 5 year overview report. FYI, the goal of the program has been to prevent summer learning loss which has been accomplished each year. In addition, average gains of 1-3 months have been achieved in reading and math. Students are pre and post tested using STAR assessment. Program is limited to MPS students only. Students must provide proof of enrollment the previous school year - report card. 80%+ of students are low income as determined by HUD forms provided by parents. 70%+ of students were below grade level proficiency in reading / math.
5. Education Plan/School Design

Section Evaluation

Final Rating

The summary has been provided

Education Plan / School Design

At MEF, we believe in the inherent potential of all students, and are undertaking this work not only because it is essential to Montgomery's future, but because our children deserve equitable access to high quality educational options. Yes, economically challenged communities often lack many resources, but it is imperative that we insist on and maintain high expectations for all children, regardless of race, gender, income level, or zip code. We have been providing extensive school year and summer programming for thousands of students through our Brain Forest and the Dept. of Defense's STARBASE STEM programs, and our relationship with Maxwell Air Force Base is an example of our ability to work within communities while simultaneously leveraging deep resources of the greater professional community. It is our hope that we can take our work a step further and begin to impact student lives during the entire school day.

We are pleased to utilize our strong relationship with the Air Force to include a partnership with the Civil Air Patrol (CAP) program and the use of their "Aerospace Connections in Education" STEM K-8 curriculum which also includes teacher support and development opportunities from their Aerospace Education Team. In addition, the STARBASE 1.0 and 2.0 STEM exposure program will be implemented for grades 4-8. Additional partnerships will be available for programs like the Cyber Patriot program/competition.

UPLOADED FILE TO THIS SECTION - Aerospace Connections in Education Overview

MEF Conversion Schools proposes a rigorous college preparatory curriculum, a strong social and emotional component, and a strategically linked pre-k-12 structure designed, over time, to transform the quality of education available to families in the Lanier feeder pattern and develop a lasting educational asset for the community. Our model is built on five essential elements rooted in our core values.

MEF Educational Plan

Five Essential Elements

As explained in our educational plan, research shows that teacher behaviors change when
1. High Expectations

they have high expectations of students. It is important for us to identify any cultural boundaries that may affect the expectations of our students and work together with staff, families and students to raise the expectations and increase performance and achievement. We will be relentless in requiring excellence from our staff and students and will require the same from our operators.

MEF’s educational program relies on research-based curriculum, instructional strategies and assessments to deliver a rigorous academic program that extends student learning to reach individual potentials. We will ensure rigorous instruction is available to all students and are committed to supporting students who struggle.

Curriculum

Engage NY and Achievement First's k-8 math and reading curriculum have been selected for their alignment with Alabama standards and a history of successful implementation in other charter schools serving similar demographics. For science and social studies we have chosen to implement the MPS curriculum, though we will continually revise and update our curriculum choices. Our math and reading curriculum are rich in resources that provide teachers with ample material to differentiate lessons to reinforce skill gaps and provide for enrichment where needed.

Instructional strategies

Our classrooms capitalize on textual analysis, task-based learning, inquiry learning and differentiation. We incorporate leveled, small-group instruction when possible, organized by the most current assessment data of student mastery as well as daily, observational trends. As our students mature through middle school, they take on increased responsibility of their individual learning goals and individual and small group learning. In fostering a safe and supportive environment for all students while gradually releasing responsibility, we will ensure they are prepared for secondary success.

Assessment

As described in Attachment 3, MEF depends on a variety of assessments to monitor student growth, curriculum decisions and teacher effectiveness. Instructional coaches monitor assessment choice and data feedback cycles with individual teachers. Quarterly data days provide time for teachers to reflect with one another and strategically plan their next unit of lessons. Incorporating nationally normed assessments allow us to track student progress on a national level and hold ourselves accountable to preparing our students for local, national and global competition. State tests allow us to demonstrate growth and improvement v. the rest of the state and our peer schools in Montgomery.

The adverse childhood experiences research has informed the educational community of the gaps in social-emotional skills in children that have experienced even just one aspect of trauma. At MEF, by teaching our core values and implementing our culture systems, we take
3. Social-Emotional Learning

a dual approach in supporting social-emotional skill development and provide a safe and supportive learning environment.

*Discipline plan* - After carefully reviewing the current MPS Code of Student Behavior, MEF has designed a proposed discipline policy that better matches our educational philosophy and meets the needs of our students. While we will continue to enforce zero-tolerance policies, we want the freedom to treat each child as an individual, incorporating restorative justice and designing behavior plans that identify the root of the behavior and provide a plan to build the skills needed to eliminate the behavior. Too often, we see the same students in detention for the same reason - and these detentions turn to suspensions and in many cases expulsion. In light of the current data, this is not an option. We believe in surrounding our students with positive messages, carefully constructed and challenging environments - and at all times - believing they are the best and giving them the opportunity to be their very best with each new day. Every student will have an adult advocate and primary parent contact through their advisory and will be empowered to change their own future.

4. Extended Learning Time

Our school calendar and schedule provide the equivalent of 182 days of instruction, exclusive of summer or optional programming. With our supportive culture systems, we reduce the amount of time taken for transitions or addressing behavior outside of the classroom. Additionally, in middle school, we include time for interventions to ensure students enter high school prepared to begin their journey to post-secondary success. Common planning time and Wednesday PD aid in sharpening our teacher skills so that every minute in the classroom is utilized for effective instruction.

5. Professional Development

The New Teacher Project has made clear in their study, *The Irreplaceables* (2012), how important quality teaching and leadership is. Therefore, an essential element in our model is an extensive commitment to teacher training and development. Our budget allocates resources for a Director of Professional Development in each school along with time for teachers and staff to grow in their practice with the support of grade level chairs and content chairs. Through this we aim to create a teacher leader pipeline and give our educators the opportunity to become experts in their field. With 2 weeks of PD before school starts, 6-8 full days of training during the school year, and 2 hours each Wednesday, we have set aside nearly 28 days a year for training and developing the best teachers and leaders.

By beginning with elementary schools and then a middle and possibly a high school in later years, the feeder pattern conversion strategy allows the middle and high school levels to benefit from improvements in academic readiness and early interventions beginning in elementary school. Ultimately, a higher percentage of middle and high school students will begin the 6th and 9th grades better prepared to succeed academically and socially and emotionally. This increased readiness is intended to reduce reliance on remediation and allow more students to access grade level content leading to improved graduation rates, higher ACT scores, and increases in college and career readiness rates.

Our educational plan is built on the best research-based practices and curriculum from successful charter school operators across the nation. We designed the educational plan to provide vertical and horizontal connections through the entire grade continuum and are making a long-term commitment to support the schools in the Lanier feeder pattern as our contribution to district wide
improvement. This educational plan ensures the authorizer that regardless of who operates the school, sound curriculum and discipline policies, designed specifically for the students of Montgomery, will be implemented.

In order to prepare our students for college and life, we strive to foster a love of learning, teach them foundational academic skills, and strengthen their social-emotional skills to handle life’s challenges. We know that in order for our students to be open to learning, it is important to feel safe and open to trying new things, failing and growing. The culture plan explained throughout this model lays the environmental foundation for our students to push themselves and meet the high expectations of our rigorous academic instructional plan.

MEF and its operators will set high expectations for all scholars, providing a variety of quality, research-based curricula and rigorous, differentiated instruction to serve all students. We know that even in vulnerable neighborhoods, a joyful school culture and rigorous academic instruction can ensure that every child succeeds on a high level, regardless of prior school experience or socio-economic status. Our educational plan targets both the lack of academic proficiency and barriers due to socioeconomic status through investing in the social-emotional health of the students, stability of the parents/guardians and home, as well as quality instruction. Our commitment to the five essential elements ensure consistency across campuses and improves our ability to attract and develop high quality teachers that can deliver effective lessons with a variety of instructional methods to ensure our students are prepared to succeed in college, career and life.

We will challenge our students and families to begin thinking about their post-secondary path at the young age of kindergarten and ensure college trips for every grade level occur every year. Our curriculum and advisory structure ensure students consistently encounter different career options through their studies, field trips, seminar, and advisory. Together, we will defy what research says should happen to young African American youth based on their socio-economic status. We will invest in rigorous instruction, community engagement, and restorative practices, not suspensions and expulsions, and together we will increase school attendance, and create history with our academic achievements.

MEF recognizes that the local educators and school personnel have been making great efforts to support the students attending the Lanier feeder schools. However, we believe that MEF Conversion Schools, through the capacity of our partners and our feeder pattern strategy, provides an innovative opportunity to join with the community to transform Lanier into the highest performing feeder pattern in the city. By working together and with the community, we expect to help our students prepare for college and career success, find their interests, connect it to their own history, and rewrite how they and others see themselves. This proposal provides a chance to change the story and prove the possible.

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**Attachments**

**Section 5: Education Plan/School Design**

| 5.1 | Aerospace Connections in Education STEM program overview | Sikes, Ann, 9/17/19 5:36 PM | PDF / 4.747 MB |

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Notes

Kristy Hatch, 9/23/19 6:31 PM:
The prompt asked the applicant to provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Please identify the non-negotiables in the school model provided.

Ann Sikes, 9/23/19 9:28 PM:
The non-negotiable that define the MEF Conversion Schools are as follows: 1) High expectations 2) Academic Rigor 3) Social Emotional Learning 4) Extended Learning Time 5) Professional Development

6. Leadership and Governance

Montgomery Education Foundation is a nonprofit organization governed by a self-perpetuating independent board of directors. The MEF board and Advisory Committee is a diverse group of skilled business leaders, educators, higher education administrators, and community leaders and has an extensive and long history of supporting public education in Montgomery County. The current board is composed of five members, including a parent. Prior to the opening of the first school, it is anticipated that the board will carefully grow to a total of seven to nine members including additional parent representation maintaining at least 20% parent participation in accordance with Alabama law.

The MEF board is highly regarded for its sound governance, clean audits, nonpartisan approach, direct provision of educational programming to thousands of Montgomery students, and its commitment to equity and access. Together, MEF’s senior leaders, board and advisory committee represent an extraordinary range of expertise and relevant experience. With such a strong board, local reputation and history of direct programming to students and families, MEF has the leadership and governance necessary for a proposal of this nature. Additionally, the diverse skills of the board and advisory committee ensure the ability to respond to unexpected circumstances as well as the ability to strategically partner with other providers. The board will leverage their relationships, expertise, and reputation inside and outside Alabama to select a strong leadership team for each school, and to support successful community engagement and fundraising activities.
Notes

**Kristy Hatch, 9/23/19 6:32 PM:**
Please identify the members of the school leadership team.

**Ann Sikes, 9/24/19 2:58 AM:**
Clarification, currently there are 4 members of the board and one slot for a parent. 20% of the board will be comprised of parents in accordance with requirements of the the 2015 Act. While the board, Advisory Committee and Start up Team are in place, the school leadership team will be developed with the provider that is recruited and selected to run the school per the application. This will of course be the first priority. In order to move this important step forward, we have an active online leadership and teacher recruitment process already underway.

7. Enrollment Summary

<table>
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<tr>
<th>Section Evaluation</th>
<th>Final Rating</th>
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<tr>
<td></td>
<td>The summary has been provided</td>
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MEF Conversion Schools plan to enroll students in pre-k through 12th grade through carefully planned timeline starting in elementary school and growing to high school. Enrollment will serve the entire feeder pattern and be open to other students in Montgomery as space may allow. Enrollment details are below.
<table>
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<td><strong>636</strong></td>
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<td><strong>450</strong></td>
<td><strong>450</strong></td>
<td><strong>450</strong></td>
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<tr>
<td>Pre K</td>
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<td>36</td>
<td>36</td>
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<tr>
<td>K</td>
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Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

The rationale behind this application and the proposed enrollment and grade levels served is to ensure high quality educational options exist within Montgomery and the Lanier feeder pattern, in particular. Each proposed conversion school in this application is intended to limit disruption for students and families, ensure adequate enrollment to support financial and operational objectives, and model an innovative strategy for academic improvement that serves all students.

Enrollment levels are based on current enrollment within the feeder pattern and do not include increases over time as a conservative approach. The objective is to enroll the same number of students, and potentially more given the capacity in each building. During startup, all grades (pre k–5) will be served in year one and that structure will follow with each additional school (6-8 for

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</table>

**Nixon Elementary** 0 0 636 636 636

**Grand Totals** 636 1086 1722 1722 1722

Assumptions: Enrollment levels are based on ASDE annual enrollment reports.
middle school). This strategy ensures virtually no disruption in enrollment and allows for additional enrollment from zoned students and elsewhere in the county as space may allow. Additional information on the enrollment plan is contained in **Attachment 8**.

---

**Attachments**

**Section 7: Enrollment Summary**

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**Notes**

**Kristy Hatch, 9/23/19 6:34 PM:**

Please confirm the school that MEF intends to open each year, which will help to clarify the data seen in the chart provided.

**Ann Sikes, 9/24/19 3:08 AM:**

The chart above reflects the opening of Davis in year 1, and Nixon and Bellingrath in year 2.
EDUCATIONAL PROGRAM DESIGN AND CAPACITY

1. Education Program Overview

Section Evaluation

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<th>Final Rating</th>
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Education Program Overview

Montgomery Education Foundation (MEF) recognizes the need for additional high-quality seats in public schools in the State of Alabama overall, particularly in Montgomery County. Every school in Montgomery County received School Performance Scores and letter grades issued by the Alabama Department of Education for the 2017-2018 school year. The district overall received a grade of C. Davis Elementary and Nixon Elementary received a grade of F and Bellingrath received a grade of D by the state of Alabama.

2017-2018 State Report Card*

<table>
<thead>
<tr>
<th>School(s)</th>
<th>Overall Grade</th>
<th>Academic Achievement</th>
<th>Academic Growth</th>
<th>Chronic Absenteeism</th>
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<td>27.88</td>
<td>62.57</td>
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<td>Bellingrath</td>
<td>D</td>
<td>28.44</td>
<td>80.01</td>
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</table>
1. High Expectations
2. Academic Rigor
3. Social-Emotional Learning
4. Extended Learning Time
5. Professional Development
6. Culturally Responsive Program

MEF’s educational program integrates a purposeful social-emotional program with a rigorous academic plan to prepare students for success in college, career, and life. Students in MEF schools will be engaged in a learning community that fosters intellectual growth and supports their individual strengths and needs so they may reach sixth grade and 9th grade equipped to excel in high school and pursue the college or career of their choice. MEF’s instructional model relies on learning opportunities that drive student engagement, promotes interaction with others, and cultivates a positive attitude towards learning as a lifelong process. By implementing this model with a multiple school k-8 (and future high school) feeder pattern strategy we plan to dramatically increase performance of the schools, beginning with elementary grades and continuing through middle school and ultimately high school.

Performance Goals of the program are found in the Performance Management section of this document.

Research Driven Program

MEF proposes a sound research-based educational plan, grounded in five essential elements and designed to address the needs
of the students in Montgomery County, Alabama. Historically low proficiency rates along with high chronic absenteeism prove the need for MEF’s whole-child approach based on our five part model.

1. **High Expectations**

Every student has the potential to succeed in a challenging academic environment where academic rigor is the norm and students are provided with academic, social, and emotional supports needed to meet these expectations. MEF offers the opportunity for students to rise to the same standard as students from high performing schools regardless of racial or demographic categories.

MEF will maintain a school-wide commitment to maintaining high expectations, ensuring rigorous instruction and extensive academic supports. Viewed through the lens of high expectations, successful schools in low-income communities are those that:

- Establish ambitious academic goals for what students will accomplish that some may believe to be unreasonable.
- Invest students in achieving the ambitious academic goal. This investment process involves convincing students that big goals are possible, harnessing the amazing power of the “self-fulfilling prophecy” of high expectations—students work harder and achieve more, simply because they believe they can and are expected to.
- Deliberately and continually improve performance over time through a constant process of self-evaluation and learning. As part of teachers’ ongoing reflection process, they must work hard to combat the constant negative influences of messages of lowered expectations that eat away at their and their students’ visions of academic achievement.

The Pygmalion, or Rosenthal, effect, whereby higher expectations lead to an increase in performance and achievement, has been closely investigated. Studies by Rosenthal and Jacobson (1992) established that “expectations affect teachers’ moment-to-moment interactions with the children they teach in a thousand almost invisible ways. Teachers give the students that they expect to succeed more time to answer questions, more specific feedback, and more approval: they consistently touch, nod and smile at those kids more.”

2. **Rigorous Academics**

MEF’s educational program selects high quality curriculum implemented through the best instructional methods and monitors the effectiveness through consistent assessment and feedback. These components provide the framework for a rigorous academic environment that pushes students beyond memorization and recall. MEF students learn to think deeply and critically, questioning their assumptions and forming conclusions on their own. Supported by a culture of high expectations, MEF’s rigorous academic atmosphere pushes students beyond assumed limitations and rewards them with a sense of personal accomplishment when they achieve mastery. Teachers are expected to explain this clearly and often to their students, build a classroom expectation that rewards effort and excellence, while also providing the academic and social/emotional support students need to extend their learning.

Selected math and reading curriculum are based on open source tools proven to be effective in charter school classrooms in multiple states. Specific examples of success with these curriculum tools comes from Achievement First (Connecticut, Rhode Island, New York) and Success Academies (New York), two premier charter school operators who have made their curricular materials open source and whose students are predominantly low income. Further explanation of the specific curriculum is found in the curriculum and instruction section.

MEF proposes to work with MPS in a collaborative effort to convert an entire feeder pattern. We acknowledge the likelihood that most students (greater than 80% are below proficient currently) will not reach proficiency in a single year or two, as this work takes time and our five part model is built for steady, lasting improvement, not quick test prep gains that ebb and flow. With this in mind, MEF classrooms require honed instructional methods, beginning with lesson planning and including implementation and assessment. The extensive professional development plan supports rapid teacher growth in acquiring the skills needed to create dynamic and engaging lessons that address standard gaps, scaffold learning concepts and monitors student growth and progress along the way. Centered on Doug Lemov’s Teach Like a Champion resources, MEF teachers receive clear and concrete actions along with resources and a supportive network to maximize their effectiveness.

The final component to ensuring MEF offers rigorous academics lies in assessment results, both formative and summative. The MEF educational program includes both types of assessments but refers also to chronic absenteeism, discipline data, and
community feedback from students, parents, families and staff members when reviewing annual progress. MEF participates in a constant data feedback loop designed to support individual, small group and whole school needs. Overall, through intentional curriculum offerings, high quality instruction and continuous monitoring of effectiveness, MEF offers the opportunity for a rigorous education that prepares the students of Montgomery to be competitive on a local, national and global basis.

3. Social Emotional Learning

From day one, MEF prioritizes social-emotional learning to develop character and life skills to support future opportunity. Our school culture plan, including PBIS and a restorative justice approach to discipline, shapes our commitment to investing in the whole child. Students must be in school to succeed in school and our advisory structure ensures every child has a close peer group and an adult advocate in the school. The school plan intentionally dedicates time and resources to fostering a safe environment for social emotional growth such as morning meditations, small group advisories, lessons in social emotional skills, access to counselors and a clinical behavior interventionist.

Research has shown that during the elementary school years, social and emotional skills are related to positive academic, social, and mental health outcomes. Correlational studies show that classes function more effectively and student learning increases when children focus their attention, manage negative emotions, navigate relationships with peers and adults, and persist in the face of challenges. Children who effectively manage their thinking, attention, and behavior are also more likely to have better grades and higher standardized test scores. Children with strong social skills are more likely to make and sustain friendships, initiate positive relationships with teachers, participate in classroom activities, and be positively engaged in learning. Indeed, social and emotional skills in childhood have been tied to important outcomes 20 to 30 years later, including job and financial security, as well as physical and mental health. 

The purpose of schoolwide PBIS is to establish a climate in which appropriate behavior is the norm. In the past, schoolwide discipline has focused mainly on reacting to specific student misbehavior by implementing punishment-based strategies including reprimands, loss of privileges, office referrals, suspensions, and expulsions. Research has shown that the implementation of punishment, especially when used inconsistently and in the absence of other positive strategies, is ineffective. Introducing, modeling, and reinforcing positive social behavior is an important step in a student's educational experience. Teaching behavioral expectations and rewarding students for following them is a much more positive approach than waiting for misbehavior to occur before responding.

Scholars thrive in a physically and emotionally safe environment. MEF will implement SEL and PBIS as a combined schoolwide strategy for improving behavior and school climate. SEL and PBIS complement each other in many ways: they share the same commitment to building the personal competence of students, linking social development with academic success, and to building and sustaining a school-wide social culture.

4. Extended Learning Time

MEF knows the majority of scholars will arrive one or in many cases, several years behind academically and will need additional learning and coaching time to catch up and excel. To provide extended learning time for students, school hours are 8:00 am to 3:30 p.m, include longer math and reading blocks, and the school calendar includes an additional 5 days of school per year. In addition, the focus on maximizing high quality instructional time within classes and using informal opportunities for learning and social and emotional development expand the amount of high quality intellectual time in the day.

Extending the learning time of students is among the approaches used to improve academic achievement, particularly among children from low-income families. Research and practice indicate that increasing learning time has a positive impact on student proficiency throughout a child's educational experience. Such enhancement can be especially consequential for economically disadvantaged students, who tend to enter school behind their more affluent peers academically and continue to lag as they proceed through each grade and have fewer opportunities outside of school for learning. For these millions of students more time in school can be a path to equity.

MEF’s educational framework includes a culture of efficiency, resulting in increased time on task. Through high culture expectations, MEF schools reduce time wasted during transitions and increase instructional time. Additionally, with a foundation of
Research-based curriculum, concentration on effective instructional strategies and methods for differentiation, MEF students have better access to more curriculum during instructional minutes.

Participation in Montgomery Education Foundation’s summer program, Brain Forest,[9] will be offered to rising 4th, 5th and 6th grade students at no charge and pre-and post-program assessments will be performed. In 2013, MEF launched the Brain Forest Summer Learning Academy, a 5-week full-day academic summer enrichment program targeted at improving student math and reading scores while preventing summer learning loss. Students lose an average of 2-3 months of academic skills during the summer months. Brain Forest aims to prevent this learning loss while providing a summer of cultural and arts enrichment, academics and fun.[10] An extensive review of summer programs by the Office of Child Development at the University of Pittsburgh found certain characteristics to be effective with low-income students, such as making learning enjoyable by joining academic content with enrichment. Economically disadvantaged students might particularly benefit from enriching activities because they often do not participate in school year extracurricular activities.[11]

5. Professional Development

Successful execution of a rigorous academic framework relies on effective teaching and a supportive professional development environment. MEF’s educational plan commits to extensive professional development that is supported by a staffing and calendar model that invests in teacher training. Each school will have an instructional coach that partners with grade level chairs, the principal, and assistant principal to ensure high quality PD and coaching is available weekly to each teacher. In addition to staffing support of teacher development, the weekly schedule includes an early release day allowing for up to two additional hours of PD per week and 6-8 full days of PD during the school year. The school year will also begin with two full weeks of PD for teachers before students arrive providing a total training opportunity for teachers of over 40 full days of PD per year. Additional opportunities to learn from higher education partners and to visit high performing exemplar schools are also provided to many staff. MEF believes that investments in teacher training and development are essential to improving outcomes for students and has structured each school so professional development and continuous learning are essential elements of the staffing model and weekly and annual calendars. As a result, teachers feel supported, develop a relationship with their coach and embrace the same growth mindset that we teach our students.

Teachers are introduced to the curriculum frameworks and instructional expectations during our 2 week professional development institute before school starts. Early release at 1:00 pm one day per week (likely a Wednesday or Friday) will provide teachers with extended learning time to engage in structured professional development for 2.0 hours. Possible trainings and development include grade level teams, content teams, vertical alignment discussions, peer observations, book clubs and other unique professional learning communities. Teachers of MEF schools see the possibility of being an expert educator in their profession. The grade level and content chair roles provide opportunities for peer and professional growth and serve as leadership pathways while also becoming an expert in your classroom.

6. Culturally Responsive Program

The Montgomery Education Foundation advocates for improvement in public education - starting with the schools in their community. Their current and previous work within Montgomery evidences their ability to work with the community to assess needs and find innovative and effective solutions. MEF has demonstrated the ability to create culturally responsive programs, specific to Montgomery County, Alabama, through their successful pre-K, Brain Forest and management of the Dept. of Defense STARBASE programs.

Culture represents an integral component to learning. A student’s culture shapes their form of communication, how they receive information and how they interact with others. [12] MEF recognizes the importance of including culture in the planning of the educational program. Upon approval of this application, MEF will begin working directly with current school staff, parents, students and community partners in refining the implementation plan for MEF schools. Based on the historical school data and MEF’s relationships with the community that exist today, this educational plan’s design calls for creating a safe learning environment where all students are provided the resources to achieve academic success - and confidence in oneself.

Based on the student and family demographic of the proposed Montgomery County schools, which are greater than 95% African American, MEF’s educational program addresses the research that confirms a correlation between “African American youths’ high self-esteem and positive racial identity with their academic success, behavioral adjustment, and positive emotional functioning
Within these three schools, a defining core value, Pride, specifically African American Pride, intersects with the student experience throughout the day. As the students rise from Pre-K through 8th Grade, they are provided the opportunity to change the narrative and challenge the negative attitudes regarding African Americans that the youth encounter. Refer to Section 6, Student Culture, for further explanation and examples of how this core value disseminates throughout the school culture.

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[10] ibid


Notes

**Kristy Hatch, 9/23/19 6:36 PM:**
Please identify the assessment plan that this school model will utilize. Will it include anything beyond the state mandated assessments?

**Ann Sikes, 9/23/19 9:30 PM:**
MEF Conversion Schools will use the state mandated assessments. Additional assessments for use as universal screeners and for assessing growth and driving data driven instructional modifications are expected to include NWEA/Map and/or STEP.

**Kristy Hatch, 9/23/19 6:35 PM:**
Please identify the non-negotiables in the school model.

**Ann Sikes, 9/23/19 9:30 PM:**
The non-negotiables that define the MEF Conversion Schools are as follows: 1) High expectations 2) Academic Rigor 3) Social Emotional Learning 4) Extended Learning Time 5) Professional Development

2. Curriculum and Instructional Design

<table>
<thead>
<tr>
<th>Section Evaluation</th>
<th>Final Rating</th>
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<tbody>
<tr>
<td></td>
<td>Meets or Exceeds the Standard</td>
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</table>

Curriculum and Instructional Design

1. Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.

Basic Learning Environment

MEF proposes to serve a feeder pattern of schools, including 2 elementary schools, a middle and a high school in the future. This application specifically addresses grades K-8, but it also connects to a broader continuum through 12th grade. While the five essential elements of the educational program provide the scaffold for the learning environment, the schools and classrooms evolve from pre-Kindergarten through 12th grade as the students mature and grow both socially, emotionally, and intellectually. MEF expects the learning environment to adapt as students matriculate through the program and predicts the first group of students across all grade levels will need specific and possibly additional supports that future students that have matriculated through MEF schools may not need or will need at less intense levels. The following descriptions encompass both common and unique elements that shape MEF classrooms from elementary to middle and then high school.

**MEF Common Learning Environment Components:**
General School Systems: MEF incorporates common best practices in setting classroom policies and procedures. These policies are posted throughout classrooms, hallways and common spaces in all MEF schools. These common practices establish a uniform culture.

- **Uniform:** All students in MEF schools wear a common uniform. The uniforms are designed to look professional, feel comfortable for students, while also providing room for individual expression. Upon approval of the charter, MEF plans to engage the parents, students and community in design of the uniform with specifics to colors and specific clothing options.
- **Hand Signals:** Silent hand signals are used for common requests, such as bathroom, water, pencil, question.
- **SLANT or similar norms:** In order to teach and instill listening skills and learning habits, MEF students sit in the SLANT position at various points during a class for maximum attention: Sit up, Listen, Ask and answer questions, Nod your head, Track the speaker.
- **“Give me five”** - All MEF school staff utilize common sayings, such as, “Give me five!” to gather students’ attention. The whole MEF community is taught to respond by tracking the speaker, sitting quietly and to put down their work and listen.
- **Halls:** In order to decrease time during class transitions, students are expected to walk quietly in the hallways. With a sense of urgency, students pass quickly and quietly to their next class. This specific model is consistent for any emergency drill but does develop in volume level as students move into 8th grade and high school. The goal of MEF schools is to develop the independence and self-control of the students so that by the time they are in High School they can transition in an orderly, safe and quick fashion.
- **Volume Levels:** MEF defines volume levels from 0 through 4 to create a common language across classrooms when setting expectations for student voice levels.

Instructional Learning Environment: In order to facilitate maximum academic achievement, all MEF classrooms will meet the following expectations for the instructional learning environment.

- **Clear Learning Objectives:** MEF requires teachers to engage in backwards planning by calendaring learning objectives and identifying how to scaffold student learning throughout lessons, units and the year. Essential questions and daily learning objectives are posted in classrooms to bring awareness to student learning and hold students accountable to monitoring their own progress in meeting the daily learning goal.
- **Differentiation:** Within MEF classrooms, there is always something to do and always something to refer to for help. Regardless of whether a student needs more assistance and reinforcement or is ready for an advanced and enriching experience, the classroom is full of resources and opportunities for growth and learning.
- **Monitoring Student Achievement:** Visuals throughout the room track class and student achievement and mastery of standards. Student work is displayed and celebrated for growth, effort and mastery.
- **Student Centered Learning:** MEF believes in letting the students do the heavy lifting and learning. With supportive visuals and resources throughout the classroom, students engage in dynamic, inquiry-based, hands-on learning activities.

Core Values: MEF has adopted the following core values from Success Academy⁴ to guide and lead the effort in building character and grit. In addition to the original 6, MEF includes “Self-Pride” as a response to the prolific negative images and messages the African American students of MEF encounter that shape their self-image and confidence. These are posted throughout the classroom and school and are modeled by all school staff.

**MEF Schools Core Values**

<table>
<thead>
<tr>
<th>Agency</th>
<th>Every member of our community takes ownership.</th>
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<tbody>
<tr>
<td>Curiosity</td>
<td>Our schools are fueled by wonder.</td>
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<tr>
<td></td>
<td>Our entire community understands that tackling tough challenges takes</td>
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<tr>
<td><strong>Try &amp; Try</strong></td>
<td>elbow grease, grit, and perseverance.</td>
</tr>
<tr>
<td><strong>Integrity</strong></td>
<td>We are honest, open, and transparent.</td>
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<tr>
<td><strong>Others</strong></td>
<td>We never forget to look out for one another. From helping someone on a project to smiling in the hallways, we build a community of mutual respect and support.</td>
</tr>
<tr>
<td><strong>No Shortcuts</strong></td>
<td>Excellent learning takes time and effort.</td>
</tr>
<tr>
<td><strong>Self-Pride</strong></td>
<td>We are proud of who we are, where we come from and where we are going.</td>
</tr>
</tbody>
</table>

**Elementary School:**

**Class Size** - Class sizes in elementary school will be 20-24 students. K-2 are planned at 20 per classroom and grades 3-5 at 24.

**Staff Structure** - Recognizing that kindergarten through 2nd grade are particularly formative years, classes will be self-contained with each teacher of record sharing an aide or associate teacher who supports them with instruction and intervention. In grades 3 and 4, classes may be taught by two-teacher teams, each team consisting of a teacher who teaches math and science, and a teacher who teaches ELA and social studies. Due to the parallel nature in the math and science frameworks, and the ELA and social studies frameworks, teachers will specialize in instructional techniques applicable to both content areas, leveraging their skills. 3rd and 4th grade teams will also have two associate teachers, one for math and science, and one for ELA and social studies. The associate teacher position provides the opportunity to train and groom new teachers, with the hope that successful candidates will transition into a teacher of record after demonstrated proficiency as an associate teacher. The staffing model includes three such associate teachers and additional roles will be funded as philanthropy allows. We are pleased to have the support of Auburn University Montgomery and Faulkner University as teacher training and professional development partners and anticipate hiring from each of those programs.

**Facilities** - MEF elementary classrooms’ layout supports the execution of the curriculum with individual, small group and community seating components, classroom libraries, reading and math centers, and areas for creative play. Flexible seating options provide opportunity for teachers to modify their spaces to meet individual needs of students and instructional methods.

**Morning Meeting** - Every day, MEF elementary school classes begin with a community gathering on the rug that sets the tone for the day. Students participate in activities that support the development of social-emotional skills through lessons based on embracing the core values.

**Recess & Guided Play** - The elementary school day incorporates opportunity for students to engage in both guided and independent play. By valuing time for students to freely engage with one another, they develop independence, inter-personal relationship skills, cognitive thinking, motor skills and collaborative problem solving.

**Middle School:**

**Class Size** - Class sizes in middle school will be 24-28 students.
Staff Structure - MEF considers developmental stages and academic needs when designing class structure. In order to provide students with the opportunity for individual and small group assistance, class sizes will remain small and associate teachers and/or aides will work alongside teachers. Given the academic deficits that exist in the Lanier feeder pattern it is important that class sizes remain manageable for teachers. In middle and high school, our teachers become content experts, providing deeper exposure to each subject. In Middle School, students will rotate through 4 main content teachers.

Facilities - MEF designs their middle schools to support the development of independence in their students. Grade level courses are situated near one another to limit time during transitions. Common areas offer safe, comfortable spaces for students to gather and work together. Classrooms support collaborative and hands-on learning with tables and flexible seating options to aid in motivating and engaging students.

Advisory - Similar to the morning meeting in elementary school, middle school students engage in an advisory each morning with the same teacher and group of students creating a small, trusted community. During these advisory meetings, students learn social-emotional skills to establish lifelong habits of time management, goal-setting and independent learning.

Recess & Enrichment - Recess continues to be an important part of adolescent development and therefore MEF includes a recess period before or after lunch for all middle school students. Electives in the form of art, music, dance, technology and PE support exposure to new interests and the development of individual student strengths.

Provide an overview of the planned curriculum, including, as an attachment (Attachment 2), a sample course scope and sequence for one subject for each division (elementary, middle, high school) the school would serve. In an attachment (Attachment 3) explain the school’s curriculum; its correlation to the Alabama standards; the specific instructional materials to be used to implement the curriculum; and the process your school will follow to evaluate, review, and revise its curriculum on an annual basis.

1. Curriculum and Instructional Design

Curriculum Overview

MEF’s mission is to provide all students a rigorous educational experience that prepares them for success in college, career, and life. When selecting curriculum for the Lanier feeder schools, MEF reviewed student data and due to the low proficiency numbers decided that the ELA and Math curriculum needs to provide a plan for addressing gaps in student standards while exposing and guiding students to mastery of grade level material. In addition, inclusion of the Aerospace Connections in Education Program and Starbase 1.0 and 2.0 STEM enrichment program will provide students access to hands on STEM learning and rich partnerships with Maxwell AFB.

Attachment 3 provides complete examples of curriculum resources for elementary and middle school. Examples included in the attachment are as follows:

1. Elementary: 3rd Grade ELA Achievement First (opens source material)
2. Middle: 7th Grade EngageNY/Eureka Math (opens source material)

The selected curriculum had to be research based with proven results while also aligning to the Alabama academic standards. As explained in the Educational Program Overview, MEF chose Achievement First ELA and EngageNY/Eureka Math curriculum for the formative and foundational K-8 years. MEF will use the Achievement First open-source curricular resources for K-8 ELA because of its strong alignment to the Alabama academic standards, selection of high-quality and appropriately rigorous texts, cross-curricular connections, and integration of reading and writing in all subjects. MEF will use EngageNY/Eureka Mathematics curriculum for grades K-8 which aims not just to teach math skills but also build mathematical thinkers. Science and social studies
curricula will be based on the Montgomery Public Schools curriculum. Attachment 3 provides an overview of MEF curriculum, its correlation to Alabama standards, the instructional materials to be used and how MEF will evaluate, review and revise the curriculum on an annual basis.

Upon approval of this charter, MEF expects that all educational materials, from classroom libraries to laboratory materials, remain in the schools for further use by MEF schools.

**Curriculum Development**

MEF’s decision to adopt the following ELA and math materials was largely driven from research, and the nature of the Alabama academic standards. Research in English Language Arts instruction demonstrates a strong link between text complexity and student achievement; the more complex text students can access, the better their academic outcomes. The same is true for mathematics: task level is a key predictor in student achievement. The Alabama academic standards also place great emphasis on text complexity and task level. In the best interest of our students we selected curricula that had a proven record of alignment (EdReports, 2017) to the Core Curriculum and the Alabama Core Curriculum. Overall, MEF’s approach is complementary to the State of Alabama academic standards in all subject areas as the MEF model celebrates instruction that is student-centered and emphasizes critical thinking, problem solving, deep conceptual understanding, and flexible application of proceedings, all of which are cornerstones of Alabama’s academic standards and crucial to student success.

By adopting a curriculum from K-8 in ELA and K-8 in math, we guarantee vertical alignment and scaffolding of skills and standards throughout our schools. Social studies and science curriculum are horizontally aligned and incorporate similar math and ELA standards as applicable into their units. MEF sets aside time through common planning, grade level team meetings and organization wide PD for our educational staff to periodically review the curriculum and ensure for vertical and horizontal alignment.

**English Language Arts**

Research has shown that two-thirds of students who cannot read proficiently by the end of 4th grade have significantly higher rates of incarceration and extended periods on welfare. Indeed, more than 70% of America’s inmates cannot read above a 4th grade level. MEF is committed to ensuring our students have access to successful futures by focusing on ELA proficiency and preparing our students to be ready to engage in more difficult content as they move through middle and high school.

To cover the Alabama Core Curriculum in ELA, MEF has chosen to adopt the Achievement First curriculum for K-8, strongly aligned with Alabama academic standards, with enhancement as needed through the MPS curriculum and other resources.

The balanced literacy program addresses literacy, writing and foundational skills in modified programs from Kindergarten through high school. Under the guidance of their teacher, students grapple with new text and learn to share their ideas through oral and written communication. Students are accustomed to cite text evidence when explaining their answers and thinking. Teachers utilize questioning strategies and require students to also ask questions to develop critical thinking skills. Observing class and small group discussions reveals students as young as Kindergarteners using accountable discussion skills while identifying and communicating the central idea of a selected text.

**Elementary**

- Students participate in daily rotations through the following activities and whole class instruction as defined in the Achievement First curriculum. Small group guided reading groups organized by STEP level develop the skills needed for independent reading and comprehension. Teachers refer to individual STEP data to inform their design of GR units through text selection and reading skills to emphasize area of improvement. Throughout the guided reading process, teachers will track scholar skill development and performance on a variety of reading behaviors, using data to continuously inform instruction. Independent Reading stations give voice to students through selection of text, foster a love of reading and build stamina in the students.

- Close Reading lessons teach students to read for meaning as well as articulate main and central ideas using oral or written language.

- Writing lessons use modeling think alouds, guided practice and individual writing conferences to introduce our students to genre-based writing, builds their stamina and develops confidence in the students writing and communication ability.
In Kindergarten through 2nd Grade, an additional block of time focuses on Phonics and Fluency. Depending on student data, MEF teachers will be trained to implement either Reading Mastery or Wilson Foundations. By building a strong foundation of phonics in the formative years, MEF students are better prepared with the necessary decoding and comprehension skills to extract and analyze information when reading the more difficult content specific text they encounter moving into 3rd and 4th grade.

**Middle School**

- During Middle School, students continue with a balanced literacy program composed of literature studies, small guided reading groups or book clubs, independent reading, vocabulary word study and writing. Teachers depend on data in designing lessons, selection of high-quality and appropriately rigorous texts, and organizing groups. Essential to the success of the Independent Reading component is access to engaging and culturally relevant texts within classroom libraries.
- Students that are more than 1.5 years below grade level will participate in Fountas and Pinnell guided reading groups with additional support for phonics, fluency, and comprehension.
- During middle school, students begin to experience integration of reading and writing in all subjects and have opportunities to apply the skills built in elementary school to access the complex content delivered in Science and Social Studies.

**Assessment**

The Achievement First curriculum includes a comprehensive list of specific assessments to implement throughout daily lessons, weekly, quarterly and annually to gather the most relevant data for informing instructional lessons. A combination of STEP and Fountas & Pinnell assessments provide Independent Reading Levels for students as well as identifying specific reading skills in need of growth for individual students. Students are introduced to Achievement First’s Process Based Assessments writing rubric in elementary school as a foundation for the college seminar style courses they will encounter in high school. In combination with the Galkins rubric, the students develop critical reading, thinking and writing skills. Daily conference notes, exit tickets, etc. provide feedback on and allow teachers to understand and address student misconceptions. Additionally, exit tickets, formal weekly quizzes, interim assessments, unit assessments and long-term projects provide evidence of student learning, growth and achievement.

**Mathematics**

Based on research and data, MEF selected EngageNY Mathematics curriculum for grades K-8 which aims not just to teach math skills but also build mathematical thinkers. Similar to our ELA model, math courses are designed to provide ample time for individual and small group instruction based on informal and formal assessments.

**Elementary/Middle:**

- EngageNY Mathematics curriculum supplies ample resources for teachers to conduct rigorous lessons exposing students to mathematical reasoning while also providing tools for extended practice and reflection. Modules inform teachers of the foundational standards to assist in differentiation and filling gaps in knowledge that may be hindering student access to the current content. Additionally, the materials provide exemplar scripts and coaching tips for preparing the lessons. For elementary teachers tasked with teaching more than one content, as well as new teachers, these resources support a rapid increase in teaching skills and guarantee better lessons, engagement and student success. Finally, EngageNY embraces the core value of high expectations for mastery that represents one of MEF’s 5 pillars of success.

**Assessments:**

EngageNY curriculum includes Do Now’s, Exit Tickets, student materials, mid-module and end of module assessments for all grade levels. The MPS District provides common benchmarks to monitor student growth and achievement in their mathematics courses.

**Social Studies**
MEF found the Alabama Social Studies Standards to be unique to the state and therefore, chose the Montgomery Public Schools Social Studies curriculum to guide K-8 Social Studies courses. MPS school Social Studies Instructional Curriculum Guides provide comprehensive resources, including alignment to grade level reading standards to facilitate literacy across content areas.

In 3rd and 4th grade, teachers will be content specialized for ELA/SS, increasing the connection between standards and skills taught during ELA being reinforced during the SS block. Social Studies curricula provided by MPS will be supplemented by additional resources as needed and draw a strong connection to the local history surrounding our schools in Montgomery. Students will journey through the history of their city, state, country, and world while building key literacy and writing skills.

**Science**

MEF will adopt the curricula in science as provided by MPS and aligned to the Alabama 2015 new Course of Study for Science. Montgomery Public Schools’ Science Curriculum Guides align standards to skills, student learning objectives and resources for instruction. STEMscopes, AMSTI and the Alabama Learning Exchange provide inquiry-based lessons to develop science habits of mind with opportunities to collaborate with others and excel in scientific discoveries. MEF science courses prepare students to think deeply and problem solve with cohesive lessons that integrate the core components of STEM. For this reason, upper elementary grade teachers in third and fourth grade are content specialized for math and science, increasing the opportunity for connections to be drawn across the curriculum. Middle school science courses incorporate scientific writing and significant project and time management building opportunities. Throughout the curriculum, teachers and students explore career and job opportunities that engage in current content, exposing the students to future opportunities for success.

**Enrichment (Arts/PE/Technology)**

MEF’s academic and staffing model dedicates resources to student enrichment and exposure to the arts and technology as well as fulfilling necessary PE requirements. Students will rotate through course offerings such as music, art, dance, theatre, visual arts, and technology, based on student interest. Providing additional education through the arts assists in developing language, decision making, visual-spatial, and motor skills.

Describe the primary instructional strategies that the school will expect educators to use and why they are well suited for the anticipated student population. Describe the methods and systems that educators will utilize to provide differentiated instruction to meet the needs of all students.

**Instructional Strategies**

Instruction will be primarily classroom based and will incorporate a range of instructional practices from direct instruction, guided practice, independent reading, and close reading. Manipulatives, books, and blended resources will also be a key part of the instructional practice found in each school. Instructional coaching relies on Teach Like a Champion 2.0 for best practices in planning, executing and monitoring effectiveness of instruction. Below are the primary instructional strategies implemented to prepare MEF students for college and life.

- Textual Analysis
- Task Based Learning
- Inquiry Based Learning
- Differentiation

**Textual Analysis in English Language Arts and Social Studies**

MEF’s framework for instruction promotes textual analysis through multiple cycles of Read-Write-Discuss-Revise. The ordering of writing before discussion is worth note because it shifts the thinking to students. Students respond to a text-based question, then discuss their answers. This ensures all voices and thoughts are heard and gives the teacher valuable data on student
performance. Teachers use student work to address misconceptions or highlight aspects of high-quality responses. During the revise portion of the reading cycle, students engage in focused revision of their response. Focused revision is a key strategy that improves student performance based on the current performance level of each student and activates them as owners of their own learning.\[9\]

Additionally, “teachers and researchers have given increased attention to the connections between reading and writing. Reading and writing are similar processes of composing meaning; practice with one contributes to the success of the other. Effective curriculum planning ensures that reading and writing, composing and comprehension, decoding and spelling lessons are well-linked so as to take advantage of the natural reciprocity between the various reading and language processes. Writing is often an effective way for learners to demonstrate comprehension and can hook kids into thinking about reading by giving them meaningful options on how the share their understanding of text. \[10\]

This model provides all students the opportunity to read a text multiple times, each time with a different purpose and respond to carefully sequenced text-dependent questions to guide and probe them thinking. Multiple reads are especially beneficial to ELL students and those with reading difficulties as they hear a fluent read first and then are able to re-read the text multiple times, each time with a different lens. This method provides students access while allowing more proficient readers the space to dissect language and draw their own background knowledge to derive a more sophisticated analysis of the text.\[11\] Each student is engaging with the same text, but the level of sophistication might be different based on their level of proficiency. The teacher then can flexibly move students along this learning continuum, continuing to stretch more proficient readers into new levels of analysis, while moving struggling readers forward at the same time. The key to the model is that text provides the context for these activities and, that students, even before they are fluent readers, are examining texts and responding to text-dependent questions before they are discussing responses. This teaches students productive struggle and shifts them from passive to active learners, a key to making them successful students.\[12\]

Students who are learning to read can still participate in Textual Analysis, by examining picture books, listening to read-alouds, and responding to text-dependent questions verbally, in pictures, or through other interactive activities. In addition to textual-analysis work, students participate in components from the balanced literacy model including centers and small groups. This small group reading instruction is based on their instructional level of reading development.

Research shows beginning readers need a combination of phonemic awareness, phonics, fluency and comprehension instruction. Small group instruction will include specific research-based strategies supporting early literacy development including blending and segmentation to build phonemic awareness, letter-sound correspondence to support phonics skills development, repeated oral readings for fluency, and strategy-based comprehension work with explicit instruction and practice in each of the strategies. Students then rotate through a series of centers where they have the opportunity to practice and apply the skills and strategies taught within the guided group through fluency and comprehension work, independent reading, and word work activities.\[13\]

**Task-based Learning in Mathematics**

Task-based learning has been proven to be an effective approach to teaching mathematics. Specifically, task level is a key predictor in student achievement.\[14\] The framework for task-based instruction begins with a launch\[15\] where the teacher facilitates a whole-group discussion helping students identify:

- Key contextual features are discussed
- Key mathematical ideas are discussed while cognitive demand is maintained, and connections are made to prior knowledge or real-world situations
- A common language is developed to describe key features (vocabulary)
- Learning target(s) or purpose of the day’s task
- Clear expectations for task and final product

The purpose of the launch is to engage students in the task, without diminishing the rigor of the task. Next, students have time to work the task independently, considering how they might solve the problem. After that, students engage in the task with a group of their peers. Group members have group roles to facilitate productive discussion of the problem and possible solutions. Differentiation could occur by grouping specific students together or by providing students with parallel tasks in order to elicit different modes of thinking. While students work, teachers circulate, questioning and probing students, and looking for anticipated
misconceptions and/or different solution paths. The teacher skillfully improvises based on the work they see from students (Smith, Margaret, et.al. 2009).

During the next phase of the lesson, the teacher deliberately sequences student work to highlight misconceptions or different solution paths. During this time, students see different ways to solve the problem. The teacher has planned to highlight work ranging from least to most efficient. For example, a struggling student might use repeated addition to solve a multiplication problem, while a more advanced student uses the traditional algorithm. Both strategies would be shown to help students make connections.

Different representations are also encouraged. Concrete models or semi-abstract pictures used to solve a problem are paired with symbolic notation. Then students have time to revise their work or solve the problem in a new way, which, as stated above, is a proven strategy to improve student learning. During the summary, the teacher highlights the main ideas of the lesson and connects students back to the learning target. Finally, students have time to apply or extend their learning through practice.

Inquiry Based Instruction in Science

MEF’s framework for science instruction also employs a student-centered approach that engages students in critical thinking, problem solving, making connections. The framework outlines the Biological Sciences Curriculum Study (BSCS) 5E Instructional Model and we draw on as many aspects as the math framework:

1. Engage or Launch
2. Explore
3. Explain or Summarize
4. Evaluate and Extend

During the Engage portion, the teacher clarifies the learning expectations and helps students understand the problem setting, scientific context, and challenge. Teachers introduce new ideas, clarify definitions, review old concepts, and connect the current problem to the student’s past experiences. Similar to math, this time period should provide students with entry points into the scientific problem or situation without diminishing the rigor of the task or, as authors of the 5-E’s name it, the teachable moment.

Next, students engage in tasks that provide them time and opportunities to resolve the mental disequilibrium or dissonance of the engagement experience. During this time, students actively engage in the Science and Engineering Practices and the Academic Science Standards through hands-on activities. Students have group roles and use those roles to work productively and cooperatively. Students explain, question, critique, and debate their scientific thinking and reasoning, and the reasoning of others. The teacher circulates, making notes on and identifying anticipated misconceptions, concepts, scientific ideas, and strategies to address in the summary.

During the summary, ideas and student work from their investigations drives this discussion. The teacher intentionally selects students to show and explain their work. Students explain, question, critique, and debate their scientific thinking and reasoning and the reasoning of others. The teacher posts and keeps record of the scientific ideas related to the learning target. Finally, just as with math, students solidify their understanding of what they have learned.

For similar reasons to those discussed above, this model allows all students space to develop scientific habits of mind, no matter their level of academic achievement, due to the open-ended nature of the tasks and opportunists to collaborate with others. Additionally, the teacher circulates monitoring student ideas and looking for possible misconceptions, developing a plan to address during the Explain or Summary portion of the lesson.

Differentiation

The MEF academic program is designed to prepare all students for success in college, career and life. This model is grounded in research on how students learn best. MEF believes that all students learn best through critical thinking, problem solving, making connections, and using a student-centered approach. These attributes are especially important when differentiating for students. Students with special needs can be experiencing the same content as a gifted student because the tasks provide for more flexibility to openness to different approaches.
Given the known data regarding performance of Nixon and Davis Elementary Schools, and Bellingrath Middle School, MEF assumes that most students will need significant remediation and academic support. In the 2015-2016 school year, proficiency rates ranged from 6% - 20% in elementary and middle school and a low 1% - 9% in high school. Our focus on building reading skills and increasing proficiency in the elementary and middle grades are essential to longer term success at the high school level.

Analysis to design appropriate Response to Intervention (RTI) strategies for every student as needed. Response to Intervention (RTI) is a multi-tier approach to the early identification and support of students with learning and behavior needs. The RTI process begins with high-quality instruction and universal screening of all children in the general education classroom. Struggling learners are provided with interventions at increasing levels of intensity to accelerate their rate of learning. Progress is closely monitored to assess both the learning rate and level of performance of individual students. Educational decisions about the intensity and duration of interventions are based on individual student response to instruction. RTI is designed for use when making decisions in both general education and special education, creating a well-integrated system of instruction and intervention guided by child outcome data.

For RTI implementation to work well, the following essential components must be implemented with fidelity and in a rigorous manner:

- **High-quality, scientifically based classroom instruction.** Throughout the RTI process, student progress is monitored frequently to examine student achievement and gauge the effectiveness of the curriculum. Decisions made regarding students’ instructional needs are based on multiple data points taken in context over time.

- **Tiered instruction.** A multi-tier approach is used to efficiently differentiate instruction for all students. The model incorporates increasing intensities of instruction offering specific, research-based interventions matched to student needs.

- **Parent involvement.** Schools implementing RTI provide parents information about their child's progress, the instruction and interventions used, the staff who are delivering the instruction, and the academic or behavioral goals for their child.

Though there is no single, thoroughly researched and widely practiced “best model” of the RTI process, it is generally defined as a three-tier (or three-step) model of school supports that uses research-based academic and/or behavioral interventions. The Three-Tier Model is described below.

**Tier 1: High-Quality Classroom Instruction, Screening, and Group Interventions**

Within Tier 1, all students receive high-quality, scientifically based instruction provided by qualified personnel to ensure that their difficulties are not due to inadequate instruction. All students are screened on a periodic basis to establish an academic and behavioral baseline and to identify struggling learners who need additional support. Students identified as being “at risk” through universal screenings and/or results on state- or districtwide tests receive supplemental instruction during the school day in the regular classroom. The length of time for this step can vary, but it generally should not exceed 8 weeks. During that time, student progress is closely monitored using a validated screening system such as curriculum-based measurement. At the end of this period, students showing significant progress are generally returned to the regular classroom program. Students not showing adequate progress are moved to Tier 2.

**Tier 2: Targeted Interventions**

Students not making adequate progress in the regular classroom in Tier 1 are provided with increasingly intensive instruction matched to their needs on the basis of levels of performance and rates of progress. Intensity varies across group size, frequency and duration of intervention, and level of training of the professionals providing instruction or intervention. These services and interventions are provided in small-group settings in addition to instruction in the general curriculum. In the early grades (kindergarten through 3rd grade), interventions are usually in the areas of reading and math. A longer period of time may be required for this tier, but it should generally not exceed a grading period. Students who continue to show too little progress at this level of intervention are then considered for more intensive interventions as part of Tier 3.

**Tier 3: Intensive Interventions and Comprehensive Evaluation**

At this level, students receive individualized, intensive interventions that target the students’ skill deficits. Students who do not
achieve the desired level of progress in response to these targeted interventions are then referred for a comprehensive evaluation and considered for eligibility for special education services under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA 2004). The data collected during Tiers 1, 2, and 3 are included and used to make the eligibility decision.

It should be noted that at any point in an RTI process, IDEA 2004 allows parents to request a formal evaluation to determine eligibility for special education. An RTI process cannot be used to deny or delay a formal evaluation for special education.

In addition to variations in the tiers used to deliver RTI services, schools use different approaches in implementation, such as problem-solving, functional assessment, standard protocol, and hybrid approaches. Although there are many formats for how a school might implement RTI to best serve the needs of its students, in every case RTI can be a school-wide framework for efficiently allocating resources to improve student outcomes.

MEF’s assumptions about individual student baseline performance will be verified by systematically measuring student growth. Students’ past performance scores will be examined and beginning-of-year diagnostic assessments will be given. This data will provide MEF with a baseline measure of student performance as well as individualized reports that target specific student areas of need and strengths. The data will be extensively analyzed to verify student performance assumptions and plan for summer and future remediation or acceleration needs. Because these weaknesses can be precisely pinpointed for each student, target and customized remediation can occur and be taught through.

Student progress will be monitored throughout the year with the use of internal and external formative assessments. MEF will use information and data from internal and external academic assessments in order to fully understand the strengths and weaknesses of students and tie them to academic programming and instruction. MEF will administer the following external assessments to elementary students: NWEA/MAP in K-8 at least two times per year. MAP (and also STAR) will be used as a universal screener and also as a formative tool to help teachers adjust midyear. LEAP may also be used from third through eighth grades. The results of these external assessments will allow MEF to assess overall growth, progress, and goal attainment on a yearly basis and also formatively during the year. MAP, in particular, has a national dataset that allows for comparison to students across the country not just in Alabama.

Results of these assessments will also allow MEF to track student growth and make any necessary remediation throughout the year. At the end of each academic year, value added growth will be measured by viewing both MAP data and summative assessment data gained from Scantron or other tests as may be required in Alabama. The data will be extensively analyzed to verify student performance assumptions and plan for the next school year’s academic plan.

In addition to external assessments, MEF will also administer internal formative assessments developed by each grade level at key moments throughout the year to ensure that each student, each grade level, and the school as a whole is on track to meet the rigorous yet attainable goals that have been set. MEF anticipates that interventions will be adjusted for all students based on these assessments and particularly for students identified as at-risk.

The special needs of gifted and talented students will be addressed through differentiated classroom instruction, enrichment programs after school and through partnerships with community colleges. This includes providing a rich academic program that addresses both acceleration and differentiation and continually reviewing student data to increase the number of gifted and talented students. MEF criteria extends beyond the intellectually gifted to students who are gifted, talented, or both in areas such as specific academic ability, leadership, visual and performing arts, and creativity.


Calkins, 1994; Eckhoff, 1983; Harste, Shorte, & Burke, 1988; Lancia, 1997; Tierney & Pearson, 1983


3. Student Performance Standards

Student Performance Standards

Describe the student performance standards for the school as a whole.

Mission specific educational goals and targets in this proposal are aligned with the objectives of the Montgomery Public Schools Intervention Report.

These goals are to improve the following:

1. Student academic achievement (State Report Card, Proficiency Rates, Growth)
2. Chronic absenteeism
3. ACT scores
4. College and career ready rates
5. Graduation rate
6. And therefore, reduce the gap between graduation and college ready rates

This proposal begins with elementary grades and will focus on growth, proficiency, and leading indicators such as attendance. Over time and after all schools in this proposal have been in operation we anticipate significant gains in high school measures (Items 2 – 5 above). Goals are phased over a 5 year timeline based on the beginning of the conversion process for a particular school.

As this proposal is for a set of conversion schools it is understood that the starting point for performance is going to be extremely low. However, in keeping with our focus on high expectations and the aggressive goals outlined in the State Intervention Plan
those goals are included here.

Middle and Elementary Schools

<table>
<thead>
<tr>
<th>Measure</th>
<th>Year 1</th>
<th>Year 3</th>
<th>Year 5</th>
</tr>
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<tbody>
<tr>
<td>State Report Card</td>
<td>3pt. increase per year on the State Report Card scoring rubric.</td>
<td>State Report Card rating improves to a D, or 3pt. increase per year on the State Report Card scoring rubric.</td>
<td>State Report Card rating improves to a C or 3pt. increase per year on the State Report Card scoring rubric.</td>
</tr>
<tr>
<td>Proficiency Rates</td>
<td>5 percentage point annual increase from prior year</td>
<td>10 -15 percentage point increase over three years</td>
<td>20-25 percentage point increase over five years</td>
</tr>
<tr>
<td>Student Growth</td>
<td>Schoolwide growth scores of 70 on the ALSDE growth scale</td>
<td>Schoolwide growth scores of 75 on the ALSDE growth scale</td>
<td>Schoolwide growth scores of 80 on the ALSDE growth scale</td>
</tr>
<tr>
<td>Chronic Absenteeism</td>
<td>3% point reduction in chronic absenteeism per year.</td>
<td>5-10% point reduction in chronic absenteeism over 3 years, or overall rate that is at or better than district average.</td>
<td>10-15% point reduction in chronic absenteeism over 5 years, or overall rate that is at or better than state average.</td>
</tr>
</tbody>
</table>

**Provide, in an attachment (Attachment 4), a complete set of the school’s proposed learning standards for each grade the school will serve. Address the skills and knowledge each student will be expected to attain by the end of each grade. Approved schools will be required to submit a full set of learning standards for all grades in the school before opening.**

See Attachment 4 for learning standards.

If you plan to adopt or develop additional academic standards beyond the applicable state and authorizer standards, explain the types of standards (e.g., content areas, grade levels, and/or others). Describe the adoption or development process that has taken place or will take place. Select one grade level and subject area as an example and explain how these additional standards exceed applicable state and authorizer standards.

MEF does not plan to adopt additional standards.

**Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents and students.**

MEF students will be promoted to the next grade by passing their core ELA, math, science, and social studies courses and meeting appropriate assessment goals set by teachers, RTI team, and school leadership. Student data is used frequently to monitor student progress and is regularly communicated to parents. No student should make it past the quarter without a parent knowing exactly
where their child is academically and socially.

If a student is struggling to meet the grade level expectations, the parent is immediately brought in to begin discussing interventions and additional support that can be implemented for the student. MEF will not practice social promotion and from time to time may retain students. Students who require credit recovery must gain the credits in summer school, another acceptable manner, or repeat the class. Retention is only used in cases where the student is severely underperforming academically and/or socially/emotionally and after the parent and school leadership have met to discuss various supports in the best interests of the student.

NOTE: Implementation of the new 3rd grade reading proficiency/retention law will be followed as it is developed and rolled out for school year 2021-2022.

4. High School Graduation Requirements

<table>
<thead>
<tr>
<th>Section Evaluation</th>
<th>Final Rating</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Meets or Exceeds the Standard</td>
</tr>
</tbody>
</table>

Not Applicable

Attachments
Section 4: High School Graduation Requirements

– No Attachments –
Notes

Kristy Hatch, 9/23/19 6:37 PM:
Please provide a statement to indicate why this section does not apply to this application.

Ann Sikes, 9/23/19 9:31 PM:
At the request of the authorizer, the application does not include high school.

5. School Calendar and Schedule

Section Evaluation

|Meets or Exceeds the Standard|

School Calendar and Schedule

Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program. In an attachment (Attachment 6), provide the school’s proposed calendar for the first year of operation, including total number of days/hours of instruction.

Annual Academic Schedule:

MEF Schools adheres to and goes beyond minimum instructional days and minutes as required by Alabama State Standards. As evidenced in Attachment 6, our schools will offer a schedule that results in additional days of instruction over the existing state and district minimums. We anticipate at least 18 full days of professional development for teachers and an additional ten days worth of training through our early release schedule one day per week. The school day runs from 8:00 am - 3:30pm four times a week with an early release day on (likely Wednesday or Friday) for staff professional development. Daily schedules are shaped to meet the needs of the chosen curriculum, provide age appropriate breaks, time for intervention, and common planning time for teachers. The school year will run 182 days with 1,205 hours of instruction.

As discussed throughout the application, we frontload our school year with 10 days of professional development during which teachers familiarize themselves with the curriculum and receive significant cultural awareness training. Longer school days allows us to release students early on Wednesday without losing instructional minutes and provide common planning time for teachers to facilitate grade level meetings, content meetings, vertical alignment meetings, data dives and lesson planning. MEF plans to look for community partners to provide childcare programs and activities on Wednesdays after school. Each school level schedule leaves room for modification through an additional intervention block for future school leaders to utilize based on student data.

See Attachment 6 for the proposed annual calendar.
Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for subjects such as English language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. This response should include, in an attachment (Attachment 6), a sample daily and weekly schedule.

**Daily and Weekly Schedule:**

**Elementary**

The elementary school day schedule supports the implementation of Achievement First ELA curriculum and EngageNY math curriculum. All students arrive and have time to receive breakfast before heading to homeroom for morning meeting. An entire half hour is dedicated to community building as students meet with their teachers to set the tone of the day. This time is also utilized by counselors and mentors to meet with students in need of assistance and help them focus for the day. All elementary students have 75 minutes of ELA and an additional 45 minutes of either phonics (K-2) or writing (3-5). An additional 75 minutes is devoted to math, during which small groups are provided for intervention. Science and Social Studies each have one hour, plenty of time to complete the lesson as required by the MPS Curriculum guides. The additional time allows for individual teachers and school leadership to accommodate for specific student needs whether it be reinforcement, enrichment or character building. The lengthy morning academic instructional periods are broken up by snack with a brain break. Lunch also has one hour, inclusive with recess, to provide important time for guided and unstructured play. School leadership will design the schedule to cater to children’s developmental needs, for example, Kindergarteners will finish academic instructional minutes first with electives at the end of the day.

**Middle School**

In the same way, the middle school schedule is designed intentionally to provide enough instructional time to meet curricular needs. The middle school schedule includes a separate period for intervention so that students can be grouped according to specific needs across the grade. Students have 2 elective periods, one for PE and an additional one for arts education. Each class is 55 minutes, including lunch/recess. Middle school students need the time for socialization and physical movement in the middle of the day. In the event of transportation needs staggered start/end times for the schools may be necessary.

**Attachments**

**Section 5: School Calendar and Schedule**

– No Attachments –

**Notes**

**Kristy Hatch, 9/23/19 6:38 PM:**

When using MPS resources, the school calendar adopted by MEF will create some challenges. For instance, has an alternative plan been created to address needed resources during Spring Break and other holiday events when MEF is open and MPS is closed?

**Ann Sikes, 9/24/19 3:20 AM:**

The exact dates of the 2020-2021 calendar is a rough draft. We fully intend to have the same major
holidays as MPS, i.e. spring break, Thanksgiving, Christmas, MLK Day etc. Where there are any gaps we will partner with the district to determine what gaps exist and develop an alternative plan.

6. School Culture

Section Evaluation

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<td>Meets or Exceeds the Standard</td>
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School Culture

MEF understands that in combination to the rigorous curriculum and instruction, school culture supports a student’s ability to reach his full potential and achieve excellence. MEF Schools promote a positive and culturally inclusive academic environment by emphasizing social-emotional learning, utilizing PBIS, relying on restorative justice practices, and building character through MEF Core Values. As students matriculate from Pre-K through 8th grade, our policies and procedures adapt to provide age appropriate support with the goal of our students graduating with the life skills needed to succeed in their career aspirations.

The School Culture section outlines the philosophies and best practices that shape the culture plan while the Handbook describes in more detail the specific behavior supports, strategies and interventions employed in the school. The plan is comprehensive and will require significant training and practice for the school staff to master all of the factors. The Arc of the Year process requires the school leader to focus on specific aspects of school culture at the beginning, middle and end of the year, building a culture that is rooted and strong, supporting teacher retention and growing exponentially from year to year.

Highlights of the School Culture Plan:

- Social Emotional Learning: To decrease the epidemic of African American school suspensions and diagnosis of emotional and behavioral disorders we will teach self-regulation techniques, social emotional skills and mindfulness.
- PBIS: We will increase time in class and decrease the use of punitive disciplinary measures by focusing on the positive. Our students will experience the feeling of accomplishment and growth as they learn new skills and behavior responses. See specific examples on pages 139-140 of the Handbook in Attachments.
- Proactive Strategies for In-Class interventions: Provides specific strategies for teachers to use when common misbehaviors occur. Page 142 of the Handbook.
- Restorative Justice Discipline: Page 144 of the Handbook provides an example of a script a teacher will use in facilitating a restorative conversation after an incident. It is essential that our staff believe in the value of restorative conversations and their ability to change patterns of behavior while growing our students moral compass. Training will occur over time as our staff become more familiar with this technique.
- Safe Space in Classrooms: In combination with self-regulation, students have a space to reset in the classroom. The space has a procedure for entering and exiting as well as resources and activities for the student to complete. Page 142 of Handbook.
• **Morning Meetings/Advisories:** All schools have a morning meeting or advisory at the start of each day for incorporating social emotional lessons, mindfulness practice and community building. This teacher becomes an advocate and mentor for the student throughout their tenure.

• **Buddy Classrooms:** Partnerships between grade level or content teachers in which students can take a break in another room while still receiving instruction. Sometimes separation is key! Page 144 of the Handbook.

• **Student Support Team:** A team comprised of family and school staff that is dedicated to supporting a child, meeting to identify needs and seeking outside services to care for the whole child. Explanation found on page 143 of the Handbook.

• **Clinical Behavior Specialist:** We will staff 0.5 in Elementary School and 1.0 in MS/HS to work alongside teachers in effectively creating behavior plans for Tier 3 students.

• **Plan for establishing and maintaining culture:** The application narrative includes specific strategies we will employ for students, staff and the community in transitioning into a new culture. Some components include orientation days, racial socialization efforts, extra-curricular activities, professional development and community building.

**Core Values:** Embody our commitment to teaching our students social and emotional skills as well as character values. Agency, Curiosity, Try & Try, Integrity, Helping Others, No Shortcuts, Self-Pride.

**Social Emotional Learning:** MEF values social emotional learning, specifically in support of the students of Montgomery, as a direct preventative effort to decrease the "epidemic of African American males being over-represented in referrals for — and diagnoses of — emotional and behavioral disorders, as well as frequent suspensions and expulsions for conduct problems." By providing culturally relevant social-emotional interventions, we expect to instill self-regulation and self-confidence in the next African American generation, essentially decreasing the probability of our students falling into the school to prison pipeline.

We found plenty of structured curriculum, such as Second Step, and even plethora books on mindfulness, like Mindful Kids, to choose between. Our search concluded with two partnership opportunities that provide robust services for a school, even the whole network, in establishing a safe and healthy school culture by supporting social emotional growth in both staff and students. Both programs stand out in that they train the leaders, empowering them to bring the practice to their school as they shape the school culture. Additionally, we were intentional about choosing partners that would care for and foster growth in the social emotional health of the teachers. Working with a high needs population can lead to teacher burnout, resulting in high turnover rates in schools that thrive on consistency. By investing in the health of our teachers, we will decrease turnover, increase teacher effectiveness and strengthen school culture.

**Valor Compass Model**

Valor Collegiate in Nashville, TN has been making national headlines celebrating the academic success of their scholars. Todd and Daren Dickson accredit the scholars’ academic achievement to the Valor Compass model of social emotional learning that supports their students before, during, and after instruction. This past year, they have partnered with Transcend, to develop and codify their model so that it can be shared and implemented across the country. Valor’s dissemination of these programs has support from The Bill and Melinda Gates Foundation and the Chan Zuckerberg Initiative and we are grateful to have access to this innovative model. With this partnership, MEF schools have the unique opportunity to train in delivering the model throughout the network.

The Valor Compass model has discovered the key to fostering optimal academic growth by feeding the soul of children. As described on their website,

"Valor scholars and faculty commit to “working the Compass” as part of their growth while at Valor. Mentor time, Expeditions, and academic courses all incorporate explicit and experiential experiences to help scholars develop sharp minds, big hearts, noble purpose, and aligned actions. Valor scholars develop character strengths such as kindness, determination, curiosity, gratitude, and integrity within a supportive community."
Attachment uploaded to this section:

Valor Circle Handbook

These attachments provide an introduction to Valor Collegiate and shares their celebrated results in both growth and achievement. Refer to Slide 30 to hear founder Daren Dickson speak to the concept of the Valor Compass model. For a deeper view into the Compass Model and Circle Work, refer to th Calor Circle Guide and The Circle Handbook with descriptions and instructions for all the protocols and procedures practiced at Valor.

In speaking with the Valor Compass staff, we agreed that there is great potential in this partnership in turning around the educational opportunity in Montgomery, Alabama. Valor is willing to work with MEF schools as whole school conversions by extending the partnership from 1 to 2 years. This extension of time will allow for school leaders to build a foundation of school culture in year 1 and master the Valor Compass model with full implementation occurring during year 2.

Achievement First is one of the first networks to partner with Valor by incorporating the Compass Model at their Greenfield Model School during their Goal Team time. In these sessions, students explore their identity and develop core values. As a result, AF’s Greenfield School has observed students building skills to become leaders, discovering their strengths and communicating about their weaknesses. Remarkably, they draw a connection between the Compass work and students making sense of the ‘why’ in education and resulting in a sense of empowerment. In the words of a teacher, “This model sets the stage so that educators can truly know their students, and inherently provides us stronger clarity about how to best support scholars so they can succeed in all parts of their learning experience. This valuable information would not have shown up on a traditional data sheet. Without it, we wouldn’t have known where to start.”

After significant research and meeting with partners, it is clear that the Valor Compass Model is a valuable resource that will provide the structure, strategies and process for serving our students’ social emotional health as described in the application. The Mindful Life Schools Program provides an optional base layer that can be used to set the stage for full implementation of the Compass Model.

Attachment uploaded to this section:

Mindful Life Program

The two programs are not connected, can work exclusive of one another or in tandem. The Mindful Life Schools Program shifts the culture of the school community that is unfamiliar with social emotional learning and mindful practices and lays a foundation of knowledge, builds value in the practice and develops introductory skills. The Valor Compass model launches a school community into the next level of character building, social emotional learning and restorative justice practices. Upon hiring a school leader and teaching staff, the leadership team will evaluate the readiness of the staff to implement the culture plan and initiate partnerships as needed.

Mindful Life Schools Program

The Mindful Life Schools Program provides the perfect introduction to mindfulness and self-awareness for staff, students and the family community. Based on brain science, Mindful Life has built a weekly program that introduces staff to the concept of mindfulness and provides practices to incorporate in both their personal and professional capacity.
“Our online program for educators and youth professionals is delivered to you weekly in bite-sized bits to build resiliency to stress, and create happy and productive classrooms. This program is incredibly easy to implement, and research shows its use decreases teacher stress, and increases student attention, impulse control and emotional regulation, all resulting in healthier and happier teachers and students.”[6]

The brain-based mindfulness curriculum is delivered in weekly trainings over the course of the school year. Stress levels for both students and teachers are reduced, promoting problem-solving, information retention and positive behavior. The program shows teachers how to transform classrooms from chaos to calm and be ready to learn in just a few minutes a day. Solutions are designed to create simple changes in the lives of teachers to help them manage feelings of overwhelm, create a positive classroom environment and increase their own personal stress-resiliency.

The Mindful Listening and How the Brain Works activities (Attachments 13 & 14) are sample lessons that a teacher will receive via email and can in turn implement during morning meeting. The material, activities and resources are designed for teachers that have just started their journey in mindfulness - easily understood, non-threatening and practical. The skills are mastered quickly by the adult and in turn delivered to students in a meaningful manner. In addition to the classroom lessons, teachers have a portal in which they can watch 5 minute videos and learn new self-regulation skills to incorporate into their own practice as an educator. The program relies on both teachers and students advancing in their social emotional skills.

Aside from the curriculum, MEF schools have the option to participate in professional development and coaching as needed (Attachment 15). Optional support includes a Kick-Off Training to ensure implementation with fidelity, additional PD sessions throughout the year, 1:1 consulting or coaching for struggling teachers, community meeting facilitation, and support in implementing restorative justice practices.

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[1] https://valorcollegiate.org/why-were-unique/balanced-education/


Positive behavior incentive systems: MEF believes in focusing on the positive instead of negative behaviors. Students are rewarded through bi-weekly celebrations, field trips, school store dollars, and other earned initiatives. Our systems include creating unique plans for at-risk students that result in growth and accomplishment - with the goal of students staying in class and learning
and less punitive disciplinary methods.

**Restorative justice discipline methods:** All staff members will be skilled in conducting and facilitating restorative conversations with students, colleagues and groups of students. While MEF follows zero tolerance policies in accordance with the Montgomery Public School’s handbook, we rely on restorative justice to support the social emotional growth of our students with the expectation that disciplinary events occur less over time as a student continues in our schools. “Black students are suspended and expelled at a rate three times greater than White students.” By implementing restorative discipline, we discover the root of the problem by giving students a voice and provide interventions to reduce the occurrence of the behavior again. Dallas, Texas saw a 70% reduction in elementary and middle school in-school suspensions, a 77% decrease in out-of-school suspensions and half the number of students were sent to alternative school after instituting restorative justice practices. MEF Conversions Schools expects to dramatically decrease disciplinary incidents in Lanier feeder schools.

**Core Values:** MEF Schools culture focuses on the following core values to reinforce student intellectual and social development.

1. Agency: Every member of our community takes ownership.
2. Curiosity: Our schools are fueled by wonder.
3. Try & Try: Our entire community understands that tackling tough challenges takes elbow grease, grit, and perseverance.
4. Integrity: We are honest, open, and transparent.
5. Helping Others: We never forget to look out for one another. From helping someone on a project to smiling in the hallways, we build a community of mutual respect and support.
6. No Shortcuts: Excellent learning takes time and effort.
7. Self-Pride: We are proud of who we are, where we come from and where we are going.

Explain plans for creating and implementing this culture for students, educators, instructional leaders, and parents starting with the first day of school. Describe the plan for transitioning students who enter school mid-year into the school’s culture.

**Establishing and Maintaining Culture**

MEF’s focus on high expectations and a commitment to social and emotional learning are drivers of school culture. In order to build and sustain the desired positive culture, all stakeholders, including staff, students and parents, need to agree to embody the core values and align themselves with the MEF’s mission to provide all our students a rigorous educational experience that prepares them for success in college, career, and life.

**Students** – We seek to build a positive culture that engages students by co-creating a shared vision that gives voice to students and agency through the Advisory and Seminar components. The following policies and procedures work cohesively to keep students safe and teach them to be respectful and responsible citizens.

**Orientation Days** - During the summer, specific days are allotted to provide students transitioning into our schools or from one school to another to come and meet the teachers and learn what they can expect from us and we expect from them. During Kindergarten orientation, students meet their teacher and explore what a day in school is like. Middle School orientation gives the 6th grade students an opportunity to explore the school and their schedule and practice opening their lockers.

**MEF Student Academy** - For the first one to two weeks of the year, staff set aside time during each class to review and practice behavior and instructional expectations - such as sitting in SLANT, accountable academic talk, and hallway, cafeteria, and assembly behavior. As students matriculate, we continue to build on previous skills and expect more of our students.

**Advisory** - Our strong advisory program, connects each student with an adult advocate in the school. Students develop small communities through morning meetings in K-5, and advisory in 6-8. In the elementary and middle school grades, culture is
developed in age appropriate ways and also includes weekly grade level community gatherings. During advisory, our students regularly set goals and monitor their progress. From the beginning, students are challenged to backwards plan and set goals to help reach their long-term career goals.

**College/Career Focus** - The culture is also one focused on college and career outcomes and in all grades college attendance and completion are overriding goals and college and career imagery, behavioral expectations, and visits to college campuses reinforce this element of the culture. During high school, students enroll in Seminar, a scaffolded curriculum that walks students through discovery of interests, identifying possible careers and readying themselves for working the steps to enroll in college or begin a post-secondary career. Seminar also includes ACT prep classes.

**Racial Socialization** - In addition to the 6 core values adopted from Success Academy, MEF includes “Self-Pride” as a direct response to the research that African American youth’s self-image and confidence are affected by discriminating and negative messages. Racial socialization, through messages of positive cultural pride and self-worth, “plays an important role in promoting positive identity development for African American youth.”[9] Visuals throughout the school of positive African American role models and cultural events, both local and abroad, provide the students with a daily, almost minute-to-minute reminder that they are valuable and have the potential to have a positive impact in their community and beyond. Local mentors leveraged through MEF relationships will interact with students in small groups and build relationships with them as they matriculate through MEF Schools. The library will include books that celebrate African American culture, relate to our students’ lives and provide inspiration to them. The curriculum, community partners and field trips capitalize on the rich Montgomery history offered through the Civil Rights Memorial, Freedom Rides Museum, National Center for the Study of Civil Rights and African-American Culture, the Memorial for Peace and Justice, the Legacy Museum and the Rosa Parks Library & Museum. We rely heavily on local partners, clergy and family to support us in the effort to provide positive racial identities and self-esteem.

**Sports and extracurricular activities**: The school model includes budget for elective teachers and athletic coaching stipends to ensure a broad spectrum of co-curricular programs continue to be offered. MEF will work with community partners and staff to offer exposure to activities beyond athletics based on student interests and available funding.

**New Students**: Transitioning students who enter school mid-year are provided with a one-on-one orientation with their parent/guardian through the community engagement coordinator and a current student. This student acts as a peer mentor, with whom the new student shadows for the remainder of the day and is a member of his/her advisory.

**Staff** – Staff at MEF Conversion Schools includes teachers, front office staff, operations staff, and volunteers. As part of our community, everyone embraces MEF’s core values, and has high expectations for themselves as they act as role models for our students. Building staff culture begins with the interview process, requires extensive professional development and maintaining a professional teaching culture.

**Interviewing Procedures** - During the interview process, potential candidates review the MEF culture plan to ensure there is alignment on how we empower and prepare our students for life. Staff, from teachers to office support, communicate with students in a calm, intentional and purposeful manner that is culturally respectful. They work together to limit the amount of infractions that require discipline, allowing students to be successful.

**Professional Development** - Two weeks before the school year begins, staff engages in differentiated trainings based on their years of experience with MEF and job position. Everyone participates in cultural awareness and trauma informed care training to prepare them to support scholars in developing healthy inter-relational habits and social-emotional skills. Staff recognition and praise is a common practice and demonstrates how the culture we have built for our students is expected and practiced across the entire community.

**Teaching Culture** - MEF is dedicated to creating policies, procedures, and a schedule that supports teachers’ success in the classroom and removes barriers to scholar achievement. Leadership teams are conscious not to overload teachers with too many additional tasks on top of instruction. Continuous educator training through instructional coaching, professional learning communities and leadership opportunities provides for high teacher engagement and low turnover. MEF believes that teachers are professionals and support their career growth while building leadership capacity within the schools and network.

**Parents/Guardians** – Upon approval of this charter, MEF will begin outreach to the families and parents of students qualified by
statute to attend the MEF school. Throughout the year leading up to our opening, we will work to build a relationship with each family, learning about individual child’s needs and how we can best support them as a family. Parents and families will view MEF Schools as a resource and support and will embrace the values of growing social-emotional skills and having high expectations. When entering the school, families encounter a recognition wall in which we showcase education and career growth accomplishments of families, solidifying the belief that it is never too late to make a change and pursue opportunity. MEF Schools provides a half time FTE dedicated to community engagement which support a strong culture by bringing in companies, organizations, and other partners to support the culture of the school. Through Advisory, teaching staff lead small communities of 15 students each year and are responsible for consistently communicating with those families regarding academics, behavior and school functions, becoming an advocate and main line of communication for that family. School orientations, family events and community partnerships develop a rich and resourceful school community.

Successful execution of this culture plan, inclusive of teaching social-emotional skills and participating in restorative justice conversations, relies on extensive staff training that results in staff understanding the theory behind the practice and equips them with the skills and confidence to execute the culture plan with competence. Research conducted by the RTI Action Network identifies specific perceptions and nuances that cause cultural dissonance between school staff and the community. In fact, it is a common practice of teachers in urban environments to lower student expectations when they are faced with the high needs and academic deficiencies of their students. By providing our staff with extended professional development before the school year starts in trauma informed teaching and cultural awareness, we push them to move beyond any perceptions and ensure that they believe every student can achieve.

Explain how the school culture will take account of and serve students with disabilities, students who are English learners (EL), and any students who are academically below grade level.

**Culture to Support Special Populations**

MEF Conversion Schools culture embraces student diversity and recognizes unique student needs. In accordance with IDEA, Section 504 of the Rehabilitation Act and the ADA, MEF commits to meeting the individual needs of students with IEPs, Section 504 plans, ELL and other at-risk students. At MEF schools, we foster an inclusive environment in which all students practice setting achievable goals and celebrate growth together as a school community. Our community embraces our differences and looks for the positive instead of viewing struggles as a deficiency or hindrance. MEF consistently monitors student data and relies on both instructional strategies and behavioral supports to meet the needs of the school population.

**Data Monitoring & Student Identification**

- Montgomery Education Foundation will utilize a special populations dashboard in order to track special education student demographics, disability categories, and service hours. Additionally, the dashboard houses and monitors information around students in the evaluation processes. This dashboard allows the school administrators and special education coordinator the opportunity to track and monitor services and identification of students with special needs so that students are not inadvertently under-served or over-identified.
- MEF follows Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act (ADA), in which both documents outline the prohibition against discrimination based on a disability. Students with impairments that substantially limit one or more major life activities are eligible for accommodations by the school. Major life activities may include, but are not limited to, walking, hearing, seeing, breathing, and learning (Section 504 Guide, 2013). If a student is suspected of needing accommodations in order to participate in or benefit from the same activities as their non-disabled peers, as determined by a parent, teacher, diagnostician, or school administrator, the student is referred to the school counselor who serves as the 504 Coordinator. The 504 Coordinator is responsible for developing, revising, and ensuring compliance in the implementation of Section 504 Plans through information dissemination, training, and support of school personnel.
- Identification of students who may be English Language Learners (ELL) begins with the administration of the Home Language Survey to any new student entering school for the first time. Based on family input, the Home Language survey
may prompt the identification process forward, requiring that students are assessed using the WIDA-ACCESS Placement Test (W-APT). The W-APT is an English Language proficiency screener designed to assist educators in the identification and placement of English Language Learners. Upon completion, students may test proficient and be deemed transitional, or they may lack proficiency and determination is needed to be made around the appropriate service delivery model for that student.

**Instructional Strategies**

- **Academic struggles are often the antecedent to misbehaviors.** MEF teachers engage in comprehensive planning while referring to leading and lagging student data to prepare lessons that meet students where they are and provide scaffolded lessons that guide the student to standards mastery. Often, during small group stations, struggling students will begin with a warm-up in which they engage in foundational skills that they have mastered already. This prompts their thinking and sets them up for their small group guided lesson on the next skill. Additionally, students with additional needs benefit from TLAC strategies that hold all students accountable and engaged.

- **Students whose needs are more severe than those that can be met in the general education classroom will access the general education curriculum in a modified format while in a special education setting.** Using the Core Content Connectors in mathematics and English Language Arts, and the Alternate Assessment Targets and Underlying Concepts in science and social studies, special education teachers will ensure students participate in the grade-level content through a narrowed scope of work. In addition, students will be taught strategies to fill skill gaps through the use of the Florida Center for Reading Research, Student Center Activities, which includes phonological awareness, phonics, fluency, vocabulary, and comprehension (Student Center Activities, 2017). Mathematics strategies and reasoning will be supported through the use of the Concrete, Semi-concrete, Abstract (CSA) Model, in which overlapping and sometimes simultaneous representations of mathematical concepts help build fluency and conceptual understanding (Sousa 2007).

**Behavioral Supports**

- **Our school models include a clinical behavior specialist for students with significant behavior challenges and to support teachers with positive interventions.** With the help of a specialist, we are able to recognize the antecedents to the behavior, change how we interact with the child and provide them with the interventions to change their reaction to these antecedents. Working with the clinical behavior specialist, students are given the opportunity to build social-emotional skills and create individual behavior plans in an effort to reduce the amount of disciplinary action taken towards students with disabilities.

- **During morning meetings and advisories, our students are introduced to mindfulness and self-awareness through morning meditations that allow them time to separate from toxic emotions or situations they have experienced outside of school and reset their minds with positive energy.** Every classroom includes a safe space designed with tools that encourage self-regulation to keep students in the classroom and give them the opportunity to reset before being disciplined. PBIS Tracking student behavior develops along the K-12 continuum, beginning with daily color charts in elementary school, a points system in middle school and ending with more responsibility and ownership on the students in high school. Teachers are trained to utilize a 4:1 ratio of positive to negative interactions and recognitions, specifically for students that struggle with behavior. The MEF school community believes that all students can overcome challenges and build the skills to be productive members of the community.

**A Day in the Life of an Elementary Student:**

Kanaya, a second grade student, wakes up and catches the bus for school. On her way out the door, she makes sure she has her agenda and daily achievement card signed by mom. On the bus, she pulls out her book, *Abby Takes a Stand*, by Patricia C. McKissack, and begins to read. She’s already reading on a third grade level and found this book about the civil rights movement in the classroom library. As she pulls up to school, she puts her book in her backpack and gets ready for the school day. Mr. Pappert smiles and shakes her hand as she exits the bus, he’s there everyday to ask how she is doing and notices when she misses a day of school. The cafeteria is buzzing with noise as she grabs her breakfast and joins her friends at the table. Mr. Hill is on breakfast duty today and stops by to ask her how she’s doing and if she was able to get the math homework done last night. Kanaya told her she used her interactive notebook to refer to the notes from class and thinks she got them all right! Yesterday, she and Mr. Hill
spent a few minutes during breakfast reviewing the lesson from the day before. Mr. Pappert gets on the microphone and quiets the cafeteria, dismissing them by grade level to their Morning Meetings.

Kanaya gets to her advisory classroom, unpacks, takes out her agenda and signed achievement card, leaves them on the desk and takes a seat on the rug. She does her secret handshake with a couple of the girls in the group and settles in to hear Ms. Noel go through the morning message. Today, they are talking about the Core Value, Agency, and what it means to take responsibility. They challenge one another to come back tomorrow with an example of “Agency” in their day today. Ms. Noel checks agendas and assigns them positive points for all being in uniform, on time and having signed agendas.

After the morning meeting, Ms. Mulgrew transitions the class into the ELA lessons. She reviews the focus of learning for the day, the centers the students will do and the homework. During the ELA lesson, Kanaya notices that Jermaine is having a rough day, he’s frustrated with the work and has torn his paper in two. Kanaya quietly walks over to Jermaine and suggests he go to the safe space and take a minute to reset. Ms. Mulgrew meets him over there and sets the timer for 5 minutes. After Jermaine comes back to his seat, Kanaya asks him if he’s okay and asks Ms. Mulgrew if she can help him start his independent study.

The timer dings and Kanaya grabs her friend to help pass out snack, she and her friend are the snack buddies this week. They pass out the snack and then head to Ms. Mulgrew's computer to pick out the brain break dance for the day. The whole class jumps and wiggles around with a boost of energy as they ready themselves for the next block of phonics.

During the morning, Kanaya and her class leave for 45 minutes of Art. They move quickly and quietly through the halls knowing the expectation and that they will continue to earn positive points by meeting expectations. During Art class today, they explored photos of indigenous African Art and then used paint on wood to create their own!

After the morning session with Ms. Mulgrew, Kanaya and the class line up for lunch. Her group has lunch first and then recess, she hopes she gets the jump rope today! She’s a little nervous for math today because there is a test but she plays through recess anyway.

She and her friends make it to math class in less than 2 minutes so Ms. Mulgrew gives the whole class a positive point. Kanaya loves entering Ms. Noel’s room because she has the funniest handshake. Ms. Hill joins the class for math and works with Kanaya in a small group reviewing the homework and the next lesson. Kanaya is relieved she got the homework right and feels confident she can do well on the test.

Finally, it’s time for the best part of the day! Science Class! Kanaya loves Science because she gets to experiment, brainstorm and problem solve without being afraid of being wrong. Today, they are checking on their plants and taking down the data to find out how much light a plant needs to grow. Kanaya’s group thought that light all the time was the best method. So far, their plant is growing but kind of dry.

After school, Kanaya lines up for the tutoring group. She’s been selected to participate in a math focus tutoring group for the next few weeks. After an hour of tutoring (with a snack), she takes the late bus home to start homework with mom.

A Day in the Life of a Middle School Teacher:

It’s 7:00AM on a Thursday when Mr. Henderson, 7th grade math teacher, drives into the parking lot. Thursdays are his early day, he heads straight to the copy room and starts the pot of coffee. Ms. Williams, 7th grade ELA teacher, pops in moments later and pours them a cup of coffee. Mr. Henderson and Ms. Williams work diligently prepping materials for the next school week while also checking in about their 7th grade students. By 7:20, Mr. Song and Ms. Hendricks have also arrived – bagels in hand. Thursday morning serves as an unofficial 7th grade team building and meeting time. These four teachers have worked together for over 3 years and value the quiet time to catch up, share stories and get advice from one another about working with their students.

Ms. Hendricks asks the group if they could talk about Tymell for a minute. He had a really rough day yesterday and hadn’t gotten much work done. She asks Ms. Williams how he does in her class and they both agree that perhaps he has a harder time with them because they are female. Mr. Henderson has a really good relationship with Tymell and promises to talk to him during
Advisory this morning. He suggests that Ms. Williams and Ms. Hendricks have lunch with Tymell to build a stronger relationship – they agree and he commits to letting Tymell know that he will have lunch with them on Friday at lunch.

It's 7:30AM and time for morning duty, Mr. Henderson heads to the 7th grade hallway entry. As students transition from breakfast to Advisory, they pass by Mr. Henderson, who is diligently checking uniforms, shaking hands and greeting every student. At 8:00AM, he heads to Advisory, greets his guys and gets down to business. While they listen to the morning message from the Principal, he checks agendas and behavior plans for signatures. Since today is Thursday, he will conference with each student and review their PBIS data and grades for the week. When he meets with Tymell, he reviews the dip in positive points during Ms. Hendricks and Ms. Williams classes and asks him to reflect on why that may be. They talked about Self-Pride and who Tymell wants to be in the eyes of others. Mr. Henderson thinks the conversation went well but knows that he will have to continue checking in on him and decides to call home and give his mom a heads up about the situation. While Mr. Henderson meets with individuals, the other students are completing their goal sheet for the week, reviewing their grades and PBIS data, writing a new goal and assessing their progress from last week.

Mr. Henderson leads the transition for the hallway into first period. Since it is 2nd semester in 7th Grade, they are giving the students a little more autonomy during transitions. All the teachers open their doors and quickly dismiss students one class at a time, allowing students to find their way to the next class and line up quietly outside the door. Teachers efficiently welcome students, greet each child at the door and hustle them into class as to not lose any instructional time. Mr. Henderson’s room has tables with 4 students at each. His students know to enter quietly, take out the homework and write down what they have tonight within the first 5 minutes. The Do Now prompts the students to review a foundational skill they will use during the lesson today. Mr. Henderson walks around the room, taking note of who is struggling to complete the Do Now. After reviewing the Do Now, Mr. Henderson moves into the core lesson – once the majority of students are ready to move forward with individual practice, Mr. Henderson calls the students that struggled with the Do Now to the back table. Here, he reviews the foundational skill and the lesson at a slower pace. As students demonstrate mastery, he sends them back for individual practice. His lesson continues to cycle with individual and small groups until the exit ticket. He uses QR codes to scan the room and capture who mastered today’s lesson and who needs reinforcement.

Mr. Henderson teaches one more period before heading to lunch duty. This quarter, he facilitates the quiet lunch study offered to students who would like tutoring or a quiet space for lunch. He invites a couple of his students from class to come and play math games to build up their simple multiplication and division skills. He can grab them for about 15 minutes but when it’s time for recess, they are out!

During the last block, one of Mr. Henderson’s students, Henry, is refusing to do work. Mr. Henderson gives him another chance to start working. Finally, he suggests to Henry to go to the safe space and complete the reflection sheet. After the timer for five minutes goes off, Mr. Henderson walks by the safe space and grabs the reflection sheet while Henry returns to his seat. During a break in the lesson, Mr. Henderson reads the reflection sheet and kneels down by Henry’s desk. Henry has put his name on the paper but is drawing circles on the side of the worksheet. Mr. Henderson remembers that Henry has been removed from his home the night before and is anxious for the end of the day as he doesn’t know where he will go. Mr. Henderson calls the counselor to meet with Henry and asks Henry if he’d like to stay after school today with him. Henry meets with the counselor and then waits for Mr. Henderson after dismissal. Mr. Henderson grabs Henry’s Advisor, Mr. Song, and the two of them encourage Henry to continue to write his own script by controlling what he can, his education. Mr. Henderson runs through the lesson with him individually after school and touches base with the counselor to make sure Henry and his family has someplace safe to stay the night.

At the end of the day, Mr. Henderson returns to his classroom and packs up. He is prepped for Friday and has his intramural basketball game tonight. The job is emotionally demanding but he relies on a balanced lifestyle to continue to give it everything he has each day.


Attachments
Section 6: School Culture

6.1 Mindful Life Program
Sikes, Ann, 9/16/19 3:23 PM
PDF / 1.581 MB

6.2 Valor Circle Handbook
Sikes, Ann, 9/16/19 3:23 PM
PDF / 3.197 MB

Notes

Ann Sikes, 9/24/19 3:26 AM:
We understand that MPS uses the state SETS dashboard. If MEF uses a different dashboard, the data will be provided to MPS.

Kristy Hatch, 9/23/19 6:41 PM:
Under the section titled Data Monitoring & Student Identification, the application reads: Montgomery Education Foundation will utilize a special populations dashboard in order to track special education student demographics, disability categories, and service hours. Please identify the name of the dashboard referenced.

Ann Sikes, 9/23/19 9:34 PM:
As an ongoing evaluative mechanism to assess support to all students we will require dashboards that not only summarize progress for enrollment as a whole, but also for special populations. This dashboard is expected to be called the Special Populations Dashboard.

7. Supplemental Programming

Section Evaluation

Final Rating
Supplemental Programs

MEF will partner with the Starbase STEM Program, which they have managed for the Dept. of Defense for the past six years, to provide STEM enrichment and programming during the school year as well as summer STEM camps. MEF will design and offer other supplemental academic programs based on the resources available from the school and community, including funding and individuals to staff the program. MEF Conversion Schools will actively seek community resources, including funding, and community partners so it may design and offer MEF school-campus-based summer school learning and enrichment opportunities for students and teachers as funds are available.

Summer School

Ideally, MEF charter school will hold summer academic camps that provides students an opportunity to catch-up academically, accelerate their learning, or explore interests beyond school subjects. After determining proficiency levels, remediation and gifted programming would be available to the students depending on their individual needs. Summer academic camps would also include parent programming to establish relationships with MEF parents and share with them the benefits of parent involvement. However, summer school programs will require additional funding and are not planned initially.

Describe the extra- and/or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded and delivered.

Nevertheless, MEF will offer its successful summer academic enrichment program. The Brain Forest Summer Learning Program is a full-day, five week academic enrichment program (25 days total) offered by the Montgomery Education Foundation (MEF) in partnership with Montgomery Public Schools (MPS), and with partnerships that have included the City of Montgomery and Montgomery Parks and Recreation Department (MPRD), the Montgomery County Commission, Central Alabama Community Foundation, Kiwanis Club of Montgomery Foundation, The Junior League of Montgomery, MT Selby Fund, BBVA Compass Bank, Till Family Charitable Fund, Loeb Family Fund, The Working Women’s Home Association, Alpha Kappa Alpha Sorority, Inc., Beta Nu Chapter, and the Montgomery Area Food Bank.

In addition MEF will provide summer STEM camps with their Starbase STEM Program, a program they manage for the Dept of Defense.

Describe the programs or strategies that will be used to address students’ mental, emotional, and social development and health.

The primary goal of Brain Forest is to prevent the academic skill loss that most students experience when their minds are not actively engaged during the summer. The program served about 280 rising 4th, 5th, and 6th graders in 2018. Montgomery Education Foundation Charter School students will be eligible to attend the summer session, which is provided at no charge to families.

The four key components of the program - academic instruction, cultural and arts enrichment, physical activity, and nutritious meals - are based on best practices. Students begin each morning with breakfast, followed by three hours of reading and math.
instruction using a project-based approach in the classroom. After lunch, students participate in cultural and arts enrichment and physical activities provided by Montgomery Public Recreation Department, a variety of community partners, and Brain Forest Classroom Assistants. Fridays are reserved for field trips and other fun enrichment activities.

Brain Forest has built a reputation for excellence since it began in 2013. In 2018, a total of 280 students were served at Carver High School in one of 14 classrooms. Of the participating students, 85% qualified as low-income, and nearly 20% were returning “brain foresters.” Students of all abilities are divided into classroom groups. Each classroom was led by a certified teacher and a classroom assistant. The classroom ratio was approximately 18:2, with 9 students for every teacher and classroom assistant. As part of a strategic teaching approach, MEF consulted with the MPS Curriculum Department to identify targeted standards per grade level with a keen focus on standards with typical low performance.

Based on the 2018 Education Report Card for Montgomery County as a whole, all elementary students in MEF managed charter school would be eligible to attend Brain Forest.

Last summer’s Brain Forest Summer Learning program included dedicated focus on two key areas: parental engagement and continued expansion of professional development for our teachers. A parent orientation night was held over two days to meet the convenience of parental schedules. Parents had the opportunity to meet their child’s teacher, ask clarifying questions, and become more familiar with offered programming. Brain Forest annually experiences greater than 85% attendance for optional summer programming.

Teachers received a full week of training that encompassed two days of learning centered on project-based learning in the classroom. They also received ongoing, weekly professional development (2 hr. sessions) during the program, culminating in earned CEU.

Additional highlights of the 2018 Brain Forest Summer program include:

- Weekly financial literacy seminars for 5th grade students - provided by BBVA Compass
- The Drum Circle – a community building and leadership activity for 5th grade students
- Afternoon enrichment groups led by Montgomery Parks and Recreation Dept. (MPRD) and Classroom Assistants. MPRD offered kayaking, water play, swimming, archery and horseback riding.
- Use of STAR for pre and post assessment
- Increased student enrollment
- Partnered with STARBASE to provide STEM programming for 6th grade students
- Daily breakfast cereal, milk and orange juice.
- Partnered with Montgomery Area Food Bank to provide daily snacks and water.

**Extra or co-curricular Activities**

MEF is committed to continuing the academic and athletic after-school activities currently in place when the schools become MEF Conversion Schools. For instance, MEF will apply for 21st Century Community Learning Center funds to continue the current CCLC programming.

MEF recognizes that extracurricular activities are extremely important to students' academic, social and emotional development and help them develop skills in team-building, communication, fostering relationships with their peers, teachers, school activity sponsors, and other adults besides their family members. Much of the research into extracurricular activities suggests they have positive effects on students. Those effects can be particularly important for students who belong to ethnic minorities, students with disabilities, and students at risk of dropping out of school. Research indicates “participation in school activities, especially athletics, leads to higher self-esteem and an enhanced status among peers. Some have argued that a positive self-esteem is a deterrent to antisocial behavior.”

After-school programs are designed to develop a student’s talent or a skill outside of their academic instruction. The most important advantage of a good after school program is that it keeps students active and widens their areas of interests. Students are
introduced to new things, sometimes interesting, sometimes challenging, sometimes both. In addition, mastering a new skill increases the child's self-esteem. It also allows children to see new career options as they observe club advisors, coaches, and other adults who work outside of schools. Socialization is another great advantage of after school programs. Children get to meet others who share their interests and develop new friendships.\[9\]

**Student Mental, Emotional, and Social Development and Health**

Montgomery Education Foundation’s academic model is designed to leverage the powerful and mutually beneficial relationship between academics and social-emotional learning.

Social and Emotional Learning (SEL) is the process through which children and adults acquire and effectively apply the knowledge, attitudes, and skills necessary to understand and manage emotions, establish and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships and make responsible decisions. SEL is critical to developing competencies besides academic content knowledge that are necessary to succeed in college and in careers. Effective SEL programming begins in preschool and continues through high school.

SEL programming is based on the understanding that the best learning emerges in the context of supportive relationships that make learning challenging, engaging, and meaningful. Social and emotional skills are critical to being a good student, citizen, and employee. Students’ ability to learn well depends not only on instruction, but also on factors such as the school climate, a sense of belonging with peers, positive relationships with educators, and the feedback they receive. Neuroscience research demonstrates that emotion and cognition are inextricably linked; emotions are critical for all people to understand, organize and make connections between even “pure” academic concepts. Many risky behaviors (e.g., drug use, violence, bullying, and dropping out) can be prevented or reduced when multiyear, integrated efforts are used to develop students’ social and emotional skills.

MEF will expand the skill set of the staff so they may lead the effort to implement social and emotional learning. Staff members have to open themselves up to a deeper commitment of knowing the kids, as the focus on building strong student-teacher relationships and setting high expectations gives kids the tools they need to thrive socially, emotionally, and academically.\[6\] MEF will provide the support for developing this skill set in the two weeks of professional development before school starts, and with ongoing support during regularly scheduled PD sessions in the school year.

To create a rich environment of supports for both students and teachers, we will implement the Valor Compass and Circle programs fully discussed in the School Culture section of the application.

MEF relies on its experience of implementing seven years of Brain Forest Summer Camp that focuses on students in under-performing schools and has researched methods of teaching with an academic/social emotional focus, and this research says that it begins with teachers. The foundation is relationships—between students and the adults in the building, but also within the student and adult peer groups. “We’ve worked to assemble a team of teachers that really understands teaching and learning and how to build those student relationships that generate outcomes.”\[7\] It is the relationship work that is grounded in SEL, as are the systems MEF will establish to improve student outcomes regardless of students’ socio-economic status and previous educational experiences backgrounds.

If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.

**Supplemental Programming Parent Outreach**

MEF is committed to bringing in outside resources and supplemental programming to the students. We work together with the organizations and staff offering additional opportunities to inform parents of each activity. Our internal communication network
capitalizes on modern technology and social media in keeping parents and families aware of school information. Additionally, teams of educators, staff members, alumni and students go to the community and host information sessions and complete door to door outreach.

[1] https://www.montgomeryed.org/summer-learning/ accessed on 03/05/2018

[2] https://www.montgomeryed.org/summer-learning/ accessed on 03/05/2018

[3] https://www2.ed.gov/programs/21stcclc/index.html accessed on 03/05/2018


[5] https://childdevelopmentinfo.com/learning/after-school-programs-benefits/# accessed on 03/05/2018


Attachments
Section 7: Supplemental Programming

– No Attachments –

8. Special Populations and At-Risk Students

Section Evaluation

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<th></th>
<th>Final Rating</th>
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<td>Partially Meets the Standard</td>
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Special Populations Plan

Based upon an analysis of schools in Montgomery County, MEF expects to serve students with special needs, including, but not limited to, students with Individualized Education Programs (IEPs) or Section 504 plans, English Language Learners (ELL),
students identified as intellectually gifted, and students at risk of academic failure or dropping out. The below table represents the estimated population sizes of each sub-group we expect to serve.

**Expected Special Populations**

<table>
<thead>
<tr>
<th>Student Population</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Special Education (IEP, 504)</td>
<td>10-15%</td>
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<tr>
<td>ELL</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>At-Risk (Chronic Absenteeism)</td>
<td>15-25%</td>
</tr>
<tr>
<td>HICAP</td>
<td>Unknown</td>
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</tbody>
</table>

Based on current MPS data, MEF expects enrollment to include 10-15% special education students and less than 1% ELL students. For the purposes of estimating the percentage of at-risk students, we will refer to chronic absenteeism trends provided by the state. Chronic absenteeism has been linked to decreased academic achievement from Kindergarten through high school. While the cause of chronic absenteeism can differ from student to student, we know that when a child doesn’t come to school, their chances of graduating with proficiency are deeply limited. By tracking absenteeism rates as a key leading indicator, we strive to identify students that are at-risk for failing and dropping out early in the year and implement interventions as early as the first quarter of the school year.

With this in mind, we have staffed our school model and designed our school schedule with the option to create inclusion or self-contained (life skills) classes depending on the severity of disabilities. Our comprehensive curriculum includes resources to assist teachers in planning for scaffolding lessons with reinforcement and extension options. The schedule, padded with extended learning time, specifically for math and ELA, provides ample opportunity for small group and/or individual interventions. An extensive RTI plan serves to identify students with disabilities and at-risk students and provide mechanisms to monitor growth and progression through Tiers of services. The model is meant to be fluid as students enter and exit based on the current content they are studying. At-risk students find sufficient support through RTI and in class instructional supports. Surrounding all of these academic interventions, MEF relies on our social emotional learning program and behavior supports to grow the whole-child.

Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports the school will provide for these students.

**RTI - Meeting the needs of At-Risk students**

MEF employs practices and procedures that ensure that students who are underperforming are identified and receive appropriate interventions. We believe intervention is about prevention and intervention in order to close the achievement gap.

MEF will use universal screeners to identify students who are at-risk and triangulates the data points to ensure proper placement into RTI2 tiers. School readiness will have been assessed using Teaching Strategies GOLD®, an ongoing, teacher-rated, authentic
observation-based, research-validated assessment system. Grounded in current research related to child development and learning, the Teaching Strategies GOLD® assessment includes 38 objectives across six domains of development (social-emotional, physical, language, cognitive, literacy, and math) that are associated with school success based on school readiness standards. Recent research supports the reliability and validity of using Teaching Strategies GOLD® at kindergarten entry to provide criterion-based information about school readiness. NWEA/MAP is administered to Kindergarten through 8th graders up to three times a year to determine their overall performance and is also used as a universal screener each August and later in the year for students who enroll midyear.

Based on results from screenings, Reading Running Records are administered to diagnose and fine tune intervention instructional needs. Students whose MAP RIT score and running record level are below grade-level expectation for that point in the school year will be placed in the appropriate intervention tiers. Running records are periodically administered throughout the year to gauge performance and adjust instructional plans. Similar to reading, Do the Math Diagnostic assessments are administered to students lower than their grade level RIT expectation. These diagnostics help determine which intervention tier is most appropriate for students. MAP and Running Records are given a minimum of three times a year. Other Diagnostics are administered when a student moves to a new tier, which can be as quickly as the student progresses.

**Tier 1 Core Instruction**

The core instruction is designed to provide access to and differentiation of the grade-level content, so all learners can be successful. The MEF academic program is grounded in research on how students learn best.

It's important to teach critical thinking when students are young, including how to analyze and evaluate evidence, arguments, claims and beliefs. Students then learn how to make judgments and decisions based on others' points of view, interpret information and draw conclusions while using a student-centered approach.

These attributes are especially important when differentiating for students and for supporting struggling students. Teachers use universal screening data and daily formative assessment data to design lessons that provide access to all students. Textual analysis, task-based learning, and inquiry-based instruction provide a vehicle for differentiation, so all students are able to access the grade level content.

**Tier 2 Intervention**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Reading Intervention</th>
<th>Math Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kindergarten</td>
<td>Leveled Literacy Intervention (LLI)</td>
<td>ST Math</td>
</tr>
<tr>
<td>1st – 2nd Grade</td>
<td>Read 180 (if available through the district) and LLI</td>
<td>Do the Math</td>
</tr>
<tr>
<td>3rd – 5th Grade</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Students needing Tier 2 intervention receive 30 minutes of small group or one-on-one instruction a day in addition to their core instruction. The following chart shows programs used for Tier 2 instruction by content and grade level.
Leveled Literacy Intervention (LLI) is a small-group intervention program that provides daily small-group instruction meant to supplement the core English Language Arts block. The systems support struggling readers in grades K-12 by addressing phonics, decoding and comprehension work through engaging with appropriately leveled books through targeted and systematic lessons designed to address deficit areas.\[7\]

Read 180 is a blended learning program designed to accelerate students two or more years below grade level toward independence with rigorous, grade-level text.\[8\]

Do the Math is a mathematics intervention program created by Marilyn Burns. *Do The Math* uses explicit instruction to move students through Concrete, Semi-concrete, Abstract (CSA) representations of math concepts and skills.\[9\]

The program is designed to help students develop the skills they need to compute with accuracy and efficiency, the number sense they need to reason, and the ability to apply their skills and reasoning to solve problems.\[10\]

**Tier 3 Intervention**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Reading Intervention</th>
<th>Math Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kindergarten</td>
<td>Leveled Literacy Intervention (LLI)</td>
<td>ST Math</td>
</tr>
<tr>
<td>1st – 2nd Grade</td>
<td></td>
<td>Do the Math</td>
</tr>
<tr>
<td>3rd – 5th Grade</td>
<td>System 44</td>
<td></td>
</tr>
</tbody>
</table>

Students needing Tier 3 intervention receive 60 minutes of small group or one-on-one instruction a day in addition to their core instruction. The following chart shows programs used for Tier 2 instruction by content and grade level.

MEF will also use System 44 Next Generation to ensure students have a proven foundational reading program designed for the most challenged readers in Grades 3–12. System 44 Next Generation is proven to help students master the foundational reading skills required for success with the Common Core through explicit instruction in phonics, comprehension, and writing.\[11\]

**Progress Monitoring and Movement Between Tiers**

Progress monitoring is conducted at a minimum of twice a month. Options that MEF is considering for progress monitoring include ST Math, Do the Math, LLI, Read 180, and System 44 all have built in progress monitoring, most of which are software generated and built into regular instructional routines. EasyCBM\[12\] is also used for Tier III monitoring. All programs selected are designed for intervention and have built in systems to evaluate student progress and move students to the next level of instruction or out of the
intervention entirely. The RTI team will regularly review and evaluate students’ progress and make necessary changes to tier placement. In cases where a student might not be progressing and responding to the interventions, and after attempts to adjust instructional delivery, the school’s team will begin evaluating the student for a potential disability.

**Implementation of Special Education Services**

MEF will organize its special education programs and service delivery options through a continuum of services focused on meeting the needs of each individual child.

**Identifying Students with Disabilities**

MEF will use a special populations dashboard to track special education student demographics, disability categories, service hours, and location of services. The dashboard houses and monitors information around students in the evaluation processes. This dashboard allows the school support team, composed of school administrators, and special education coordinators the opportunity to track and monitor services and identification of students with special needs so that students are not inadvertently under-served or over-identified.

In accordance with State of Alabama requirements, MEF will arrange evaluations for three-to-five-year olds and school-aged children with suspected learning disabilities (Child Find). Special Education addresses the educational needs of children within the school who have identifiable disabilities, from age three through twenty-one years, or until they receive their high school diplomas. MEF will work with the Special Education Department to identify teaching strategies, best practices, and interventions to meet the needs of all students. MEF’s Special Education department will strive to offer services in the least restrictive environment to the maximum extent appropriate, providing an education in the same manner as it is provided to every other child, alongside their peers in a general education environment.

The identification, location and evaluation of students will include paying attention to particular students who don’t have public school records that include former special education services, including includes students attending private schools, students who are highly mobile, students who have been suspended or expelled from school, home-schooled students, students who have not graduated from high school with a regular high school diploma and those who may be in need of special education and related services even though they are advancing from grade to grade, and regardless of the severity of the disability.

MEF will follow Section 504 of the Rehabilitation Act of 1973[13] and Title II of the Americans with Disabilities Act (ADA), in which both documents outline the prohibition against discrimination based on a disability. Students with impairments that substantially limit one or more major life activities are eligible for accommodations by the school. Major life activities may include, but are not limited to, walking, hearing, seeing, breathing, and learning.

If a student is suspected of needing accommodations in order to participate in or benefit from the same activities as their non-disabled peers, as determined by a parent, teacher, diagnostician, or school administrator, the student is referred to the school counselor who serves as the 504 Coordinator. Additionally, students who complete the evaluation process and do not qualify for special education may also be referred to the 504 Coordinator. The 504 Coordinator then meets with the parent/guardian, the student (when appropriate), a general education teacher, a school administrator, the referring individual, and any other qualified persons who is knowledgeable about the student and their needs.

During this meeting, all participants discuss relevant data (educational, behavioral, and/or medical), interventions already in place, placement options, and the possible need for further evaluation. Based on the review of records, the 504 Team is responsible for determining if the student does or does not qualify for a Section 504 Plan or whether further evaluation is required to determine the best approach to meeting the needs of the student. The 504 Coordinator is responsible for developing, revising, and ensuring compliance in the implementation of Section 504 Plans through information dissemination, training, and support of school personnel.
**Staffing Plan**

MEF intends to hire a school leader, a special education coordinator, a clinical behavior interventionist, and teachers with experience with student populations similar in educational needs to the Montgomery Public Schools to ensure students will receive the academic, social, and emotional support they need to be successful in elementary school and beyond.

MEF prioritizes recruiting, training, and retaining, high-quality, qualified teachers. Quality candidates will be hired to manage a caseload of 18 - 22 students with responsibilities including advocating for and ensuring academic, emotional, and behavioral needs are met in order to support progress, making tools and resources available to staff implementing any and all parts of the IEP, and managing individual case compliance for each child with support from the special education coordinator.

In serving students with federally recognized disabilities, MEF will employ high-quality special education teachers to deliver services and manage caseloads, include co-teaching in the general education setting, providing consultation to school staff, training and managing paraprofessional staff, empowering and supporting general education teachers around accommodating lessons and assessments and then adjusting supports as students’ progress, lesson planning, teaching and collecting data in a self-contained special education setting, and providing guidance and support around behavior management strategies.

As advocates for specific students and caseload managers, special education teachers monitor student achievement data on both benchmark assessments and progress toward IEP goals, attend to student behavioral performance and need, track student attendance and discipline records, regularly communicate with teachers, administrators, service providers, and family members to advocate for and effectively support the ever-evolving needs of diverse learners.

Professional development (PD) and on-going supports and trainings are priorities of Montgomery Education Foundation’s special education program. Special education teachers and staff participate in specialized PD around topics including writing instructionally appropriate IEPs, goal and progress monitoring, accommodations and modifications, Functional Behavior Assessments (FBA) and Behavior Intervention Plans (BIP), and growth mindset and student advocacy. Special education teachers also participate in content-specific professional development in the areas of mathematics and English Language Arts. Throughout the school year, all special education staff will participate in professional learning communities (PLCs), where current research is discussed, policy changes are shared, and staff can seek support in areas of struggle.

As MEF plans to open conversion schools, in cooperation with MPS, nurses and related service providers will be provided through the partnership with the local LEA. Educational Assistants will be hired as needed by MEF Schools. To the extent the LEA is unable to provide related services including clinicians to provide speech and language services, occupational and physical therapy services, counseling services, nurses, and vision and hearing services will be contracted through a provider who supports and maintains specialists who are certified/licensed in their field of expertise. In order to provide educational evaluations for the determination of initial and continued eligibility for special education services, MEF will contract with clinical evaluators to work with the special education teachers and IEP teams to determine the most appropriate location for and time allotted to the delivery of services as based on student need.

Given the anticipated needs of our students, special education and otherwise, we have carefully designed the staffing model to ensure robust support is provided and delivered by an effective team focused on serving students and working together with parents and external providers. The team includes the following:

1. Principal, Assistant Principal, Dir. of Professional Development
2. Special Education Coordinator
3. Clinical Behavior Interventionist
4. Reading and Math Specialists
5. Counselor

-
Least Restrictive Environment

Least Restrictive Environment (LRE) is the requirement in federal law that students with disabilities receive their education, to the maximum extent appropriate, with nondisabled peers and that special education students are not removed from regular classes unless, even with supplemental aids and services, education in regular classes cannot be achieved satisfactorily. [20 United States Code (U.S.C.) Sec. 1412(a)(5)(A); 34 Code of Federal Regulations (C.F.R.) Sec.300.114.] The school leader and special education will ensure that each student’s educational plan not only fits their learning needs but is also provided in the least restrictive environment (i.e. in regular classrooms as available, for instance) and other ways that meet the definition of “least restrictive environment” that will benefit the student.

For the majority of students, this means an integrated program inside the general education classroom, where all students benefit from varying co-teaching models in which the general and special educator share the responsibilities of ensuring all students, regardless of ability level, access, learn, and master the grade-level curriculum. During inclusive instruction, all students without discrimination may experience whole group, small group, and one-on-one instruction as deemed appropriate by the cooperating teachers.

For students whose needs exceed the reach of the co-teaching model, instruction can occur in a special education setting with a focus on foundational skills. Within this setting, intervention specialists deliver targeted, research-based instruction to build compensatory strategies and fill in learning gaps. Foundational courses are meant to be temporary placements for students who cannot access the general education curriculum in math and/or ELA until their deficits are remediated. Modified curriculum in a special education setting is available for students whose IEP team determines that the student’s cognitive, behavioral, emotional, and/or physical needs cannot be met without intensive, specialized instruction outside of the general education setting for up to 79% of time in school.

Students whose needs are more severe than those that can be met in the general education classroom will access the general education curriculum in a modified format while in a special education setting. Using core content connecting features in Engage NY mathematics and Achievement First English Language Arts, special education teachers will ensure students participate in the grade-level content through a narrowed scope of work. In addition, students will be taught strategies to fill skill gaps through the use of the Florida Center for Reading Research, Student Center Activities, which includes phonological awareness, phonics, fluency, vocabulary, and comprehension.

Monitoring Disproportionality

MEF will use five of the best sources of information on progress: 1) The results of a student’s most recent special education evaluation. 2) Measurable annual goals. 3) Progress reports. Parents must be informed at least as often as parents are informed of their nondisabled child’s progress. In addition, periodic general education report cards and parent conferences may provide progress reports. 4) A new IEP is written annually for children in special education. The IEP must include a statement of the child’s present level of performance for each goal. Parents can compare this statement to the statement made the previous year, and 5) meeting with the school’s Special Education teacher and/or Coordinator.

Special education instructors and coordinator(s) will ensure that they, along with the school counselor, will include high school graduation and post-school indicators in each student’s IEP. Additionally, all students, including those with disabilities, partake in our unique curriculum that guides students through making post-secondary goals and creating a plan for achievement.

MEF is aware of and will provide Coordinated Early Intervening Services (CEIS) services provided to students in kindergarten through grade 12 (with a particular emphasis on students in kindergarten through grade three) who are not currently identified as needing special education or related services, but who need additional academic and behavioral supports to succeed in a general
education environment. MEF will work with the State of Alabama and Montgomery Public Schools to adopt recommended, appropriate, and transparent methods to evaluate procedural and substantive compliance with special education rules and regulations.

Explain how the school will identify and meet the needs of intellectually gifted learners

- 
  
a. Approach to defining gifted, methods for ensuring equity and comparability in identification of students in need of gifted services, and methods for monitoring and ensuring racial equity in the gifted program.

- 
  
b. Certification requirements for gifted specialists and professional development targets for general education teachers who teach gifted learners.

- 
  
c. Methods for ensuring the needs of gifted learners are met and continuum of service delivery options that will be offered (e.g., pull-out classes, advanced classes, interest clusters, cluster grouping with differentiated curriculum for gifted learner, acceleration procedures, field studies, mentors, all of the above).

- 
  
d. Methods for determining cognitive and affective growth among gifted learners.

- 
  
e. Procedures related to the monitoring of achievement data for gifted learners, including plans for disaggregation and distribution of results to parents.

- 
  
f. Self-monitoring methods for the gifted program, including what, when, and by whom.

HICAP

While proficiency numbers are low, we recognize that students can be gifted intellectually even though they have not mastered Alabama grade level standards yet. MEF believes that there are highly capable students in their schools and is prepared to offer extended educational opportunities to them.

Identification of Gifted Students

Students who are gifted may be identified through referral by a parent or teacher or via the RTI process. The RTI process utilizes a universal screener which assists in identifying high performing, accelerated learners. MEF will identify students as intellectually gifted children and youth are those who perform or who have demonstrated the potential to perform at high levels in academic or creative fields when compared with others of their age, experience, or environment.

With the identification of gifted, students will be educated based on an Individualized Education Plan (IEP) created by the student’s IEP team. In order to meet the needs of gifted students, we will employ at least one special education teacher who either holds an endorsement in gifted education or has received certification through the employment standards. Gifted students may receive their services in a variety of formats, based on the individual student’s needs. These options include, but are not limited to, academic acceleration through curriculum compacting, enrichment projects within the general education setting, supplemental learning materials, and/or grade skipping (supported through the use of the Iowa Acceleration Scale).

Student achievement will be monitored via IEP goals to ensure educational services are appropriately impacting a student’s educational experience and success. MEF will work with the Alabama Gifted Education Program which provides technical assistance to all public school systems serving Alabama’s gifted children.

Staffing Plan

Gifted and talented teachers are trained to identify and select advanced students for gifted and talented programs through conducting parent and student interviews and administering assessments. When working with gifted students, teachers need the
skills necessary to plan and implement a challenging curriculum and must also be able to test, assess, and grade students at their performance level.

**Instructional Plan**

Teachers of the gifted and talented frequently work with other classroom teachers to develop assignments for advanced students in regular classrooms. Teachers of the gifted and talented must strive to create a learning environment that is academically challenging for advanced students while remaining appropriate to students’ behavioral development.

Certain teachers will be identified as Gifted and Talented instructor(s) and will work with the school counselor to ensure the needs of individual gifted and talented students. This work includes partnering with the LEA to leverage existing district services currently in place in the Lanier feeder pattern or available to Lanier students. Within the construct of the MEF program, options offered include pull-out classes, advanced classes, interest clusters, cluster grouping with differentiated curriculum for gifted learner, acceleration procedures, field studies, mentors and others as appropriate. Teachers may meet more often with parents to keep them involved in and supportive of their student’s progress. A variety of achievement data of gifted students will be collected and analyzed each nine-week term.

MEF will utilize the planned scope and sequence for gifted and talented students. During the daily intervention blocks for reading and math, accelerated learners will participate in enrichment activities which promote higher-level thinking and growth of critical thinking skills. Students who require a higher level of differentiation during the general education courses as well may be evaluated by a certified specialist in the area of giftedness, specifically assessing student achievement, creativity, and cognition.

MEF will offer honors courses and advanced placement (AP) courses and provide challenging, and hands-on learning environments suited for gifted students. Students will work on projects integrated with the core academic areas while providing opportunities to learn in a real world setting. Differentiating Instruction offers teachers many strategies and resources for providing different levels of content and activities that will challenge all students, including gifted learners. Assessments of individual projects and overall grades will be used to determine cognitive and affective growth among gifted learners.

Achievement data will include: course final grade, state assessment results, formative and summative data. The school will have a culminating event each nine-week period to share place-based and project-based learning with parents and the community. Projects will be scored based on a rubric. Rubric scores will become part of each gifted student’s portfolio of data. To ensure continuous improvement of the gifted education program, the administration will review the accomplishments and data of the gifted students and talk with a group of gifted students and interested teachers to discuss how MEF may better serve the needs of the gifted students.

**Identification of ELL**

MEF schools will serve English Learners (ELs) in compliance with the Alabama Department of Education’s EL Policies and Procedures Manual. Identification of students who may be English Language Learners (ELL) begins with the administration of the Home Language Survey to any new student entering school or the district for the first time. Based on family input, the Home Language survey may prompt the identification process forward, requiring that students are assessed using the WIDA-ACCESS Placement Test (W-APT). The W-APT is an English Language proficiency screener designed to assist educators in the identification and placement of English Language Learners.[18] Upon completion, students may test proficient and be deemed transitional, or they may lack proficiency and determination is needed to be made around the appropriate service delivery model for that student. For students whose Home Language survey appears inconsistent with interactions with the family or student, MEF may request a parent interview in order to clarify any misunderstandings and ensure that students are appropriately identified and given access to all necessary academic supports. MEF will use parents’ preferred language and will...
find a fully bilingual interpreter from school staff, community members, a parent liaison or will hire one. MEF will translate written communication into the parents’ native language, if helpful to do so, and will connect parents with bilingual staff.

The State of Alabama does not have statutes in place regulating specific language instruction educational programs and services for EL students. However, federal guidelines regarding EL students provide guidance needed to identify, assess, and place students into an appropriate language instruction educational program. The completed survey becomes part of the student’s permanent record. The identification and placement of EL students in an appropriate language program that assures them of an equitable, quality education is a four-step process that includes: 1) Home Language Survey, 2) Initial Assessment of Language Proficiency Step 3) Parental Notification, and Step 4) Program Placement.

EL students will be monitored on an ongoing basis to assess their progress toward English proficiency/fluency. Students will remain in the EL program until they demonstrate their English proficiency/fluency. EL students will be monitored no less than once each nine weeks during the first year and at least one each semester during the second year.

Staffing Plan

MEF will hire qualified EL staff to serve students based on the number of students and their EL needs. We will continue to monitor enrollment to look for trends of increasing EL students in order to prepare for future school years. Based on current demographics data the number of EL students is extremely small and we will monitor enrollment for material changes in this subset of students.

Instructional Program

MEF will offer the same academic content as all other students in the general education classroom. The curriculum will be supported with the following EL instructional strategies:

- Use of sentence strips
- Set up dialogue journals between the student and teacher
- Plan activities using role play and drama
- Use student reading logs
- Use Cloze exercises
- Write summaries
- Give students the outline of lessons and questions that will be asked beforehand, so they have an opportunity to process information and participate more readily
- Use pictures in conjunction with speaking and writing


Attachments

Section 8: Special Populations and At-Risk Students

– No Attachments –

Notes

Kristy Hatch, 9/23/19 6:43 PM:
What instructional model will be utilized to serve 3 and 4 year olds? Have partnerships been established with Early Intervention Coordinators?

Ann Sikes, 9/24/19 3:36 AM:
First Class Pre-K classrooms will be implemented to serve pre-k. As a long term advocate and supporter of pre-k, MEF has a long relationship with the Dept of Early Childhood and the First Class program. MEF was actively involved in the initial support and opening of MPS based classrooms and the McKee Pre-K center. MEF continues to be active in assisting with identifying and growing community based classrooms. Due to this history, MEF has many relationships within the early childhood professional community that will be used to identify an Early Intervention Coordinator(s).

Kristy Hatch, 9/23/19 6:43 PM:
The ALSDE recommends a caseload of no more than 20 students. MEF suggests assigning 18-22. Please
correct this if it is in error or describe the rationale for the excess.

Ann Sikes, 9/23/19 9:37 PM:
The budget evidences caseloads of 20 students for both elementary and middle grades. The narrative references 18-22 as a way of anticipating that student needs will vary. In cases where students needs/minutes/supports are high it could be a caseload of 18 or even less, in other cases it could be higher. The budget shows a caseload of twenty, but we know students are best served when some degree of variation in the caseload is allowed.

9. Student Recruitment and Enrollment

**Section Evaluation**

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<th>A</th>
<th>B</th>
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<tbody>
<tr>
<td><strong>Final Rating</strong></td>
<td>Partially Meets the Standard</td>
</tr>
</tbody>
</table>

**Student Recruitment and Enrollment**

MEF Conversion Schools are open enrollment charter schools that guarantee zoned students enrollment priority and are operated in partnership with the district to ensure full access. One of the benefits of the conversion model is the elimination of any enrollment bias or unofficial selectivity. In the simplest terms, nothing changes with respect to enrollment – all families zoned for conversion schools may still send their children there and are guaranteed enrollment through the normal enrollment process, until school capacity is reached. This ensures that families that have an economic or academic disadvantage that requires special services have the same access as any other family. Essentially, all students with proof of address in the school catchment area are guaranteed admission, as are any currently enrolled students as long as the school population capacity has not been reached. Students who live outside the catchment area are also eligible but are not guaranteed admission and must be selected via lottery if there are available enrollment spots. In accordance with Act 2015-3 Section 5(a)(3), MEF will not limit admission based on ethnicity, national origin, religion, gender, income, disability, English language proficiency, or academic or athletic ability.

The annual enrollment cycle includes open houses and neighborhood canvassing to ensure families have access to the information regarding the enrollment process. Being out and accessible to the community is important not only for information sharing but also for trust and relationship building. To support this process we have included in the staffing model a half time community engagement coordinator whose key responsibility is enrollment and community outreach. Important information regarding enrollment will be communicated via social media and through direct mail to homes in the catchment area in addition to open meetings at all the neighborhood schools.

As a conversion school the enrollment philosophy is based on mirroring prior enrollment zones and ensuring minimal disruption to
students and families, while also welcoming other students who may choose to enroll – as space may allow. All students are welcome and we expect demographics to be largely similar to current levels. Transportation will be provided as in all other district schools using zoned or feeder pattern enrollment, thus ensuring no change in access to the school.

Explain the plan for admitting students based on a random selection process if more students apply for admission than can be accommodated.

Each year the school will conduct an enrollment process by which families indicate intent to enroll. Families with proof of address in the zone are guaranteed enrollment as long as population capacity has not been reached, merely by completing a registration form by the required date. Families with addresses outside the zone must complete an application and if demand exceeds capacity, will be selected via lottery in accordance with the Alabama School Choice and Opportunity Act at a public meeting. Priority ranking for applicants in the event a lottery is needed and as described in the law is as follows:

1. Proof of address in the elementary zone – guaranteed admission
2. Proof of address outside the school zone but within Montgomery County – next priority
3. Proof of address elsewhere in the state of Alabama – last priority

Registrations and Applications will be accepted online and accommodations will be made for paper submissions. Translation services, if necessary, will be provided.

After the enrollment process is completed a wait list will be created and will be utilized in the event the school chooses to add additional students during the year. There is one exception to the waitlist – students who may move into the zone after the application and lottery deadlines or during an existing school year and have proof of address in the zone will have the opportunity to enroll immediately if the school is below facility capacity.

Explain the school’s policy regarding enrollment preferences with respect to students who reside within the former attendance area; students within the local school system; students outside of the local school system; previously enrolled students; siblings of students; and children of founders, governing board members, and full-time employees.

As stated above, MEF Conversion Schools will be open first to students with proof of address in the zone, then students outside the zone but within Montgomery County, then any student with proof of address elsewhere in Alabama. In accordance with state law, enrollment preferences within those groups will be given to students enrolled in the public charter school the previous year and to siblings of students already enrolled in the public charter school. MEF will also give enrollment preference to children of board members and full-time employees, limiting this preference to no more than 10% of the student population. Subsequent enrollment will be allowed for any Alabama resident until the school reaches its maximum facility capacity.

1. Provide, as an attachment (Attachment 8), the school’s enrollment plan, which should include the school’s plan for maintaining records on all enrolled students utilizing the state-adopted Alabama Student Information System (ASIM).

See Attachment 8
Attachments
Section 9: Student Recruitment and Enrollment

– No Attachments –

Notes

Kristy Hatch, 9/23/19 6:44 PM:
The application reads that there will be a deadline for students to submit an application, which is contradictory to MPS practice.

Ann Sikes, 9/24/19 3:44 AM:
There will be no application, students will simply enroll and MEF will follow the 2015 Act regarding the enrollment priority of school zoned students first, MPS zoned students second and out of district students third. MEF and MPS share the same goal to enroll as many students as possible.

10. Student Discipline

Section Evaluation

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<thead>
<tr>
<th></th>
<th>Final Rating</th>
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<tbody>
<tr>
<td></td>
<td>Meets or Exceeds the Standard</td>
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Approach to Student Discipline

MEF strives to provide all our students a rigorous educational experience that prepares them for success in college, career, and life. We believe that this educational experience must consist of both academic preparation as well as opportunities to develop social-emotional skills, increasing their opportunity to lead a healthy and balanced life and equipping them with the academic foundation and strong sense of self necessary to compete in a local, national and global context. Additionally, we believe an effective school culture is much more than a discipline policy and is why we have core values and an embedded approach to social and emotional learning. Further, we want students to be in school and we want our discipline policy to effectively navigate the need for safety and security of the people and premises at all times while also allowing for the school take steps to maintain enrollment, honor our belief in the potential of all students, and limit suspensions and expulsions.
In designing our proposed discipline policy, MEF reviewed the 2017-2018 MPS Code of Student Behavior to ensure alignment between our discipline policy and the local, state and federal guidelines. The below description, along with Attachment 9, outline specific policies MEF will adopt from MPS along with those that have been modified to suit the culture of our school plan. By modeling our discipline policy from the MPS Code of Student Behavior, we have ensured that our policy complies with state and federal laws.

Upon approval, MEF will adopt and include the following policies and expectations from the MPS Code of Student Behavior into our Discipline Policy.

- School Attendance & Truancy: including the Compulsory School Attendance Law, Montgomery City Truancy Ordinance, and Alabama Law Enforcement Agency (ALEA) compliance.
- Zero-tolerance Offenses: MEF adopts Class C & D Offenses, as defined in the MPS Code of Student Behavior as zero-tolerance, expulsion offenses.
- Anti-bullying and Harassment Policy
- Grievance Procedures
- Alabama State DOE Policy on digital devices during administration of a secure test
- Family Educational Rights and Privacy Act Notice
- Pro-Children Act of 1994
- Alabama Accountability Act Parent Notification
- Transportation Policy

In addition to these policies, MEF has drafted a proposed discipline policy (attachment 9) that includes the following:

- Commitment Statements
- Core Values
- School Rules
- School-Wide Culture Systems
- Discipline Infraction Categories and Responses
- Suspension and Expulsion Policy
- Family Involvement and Communication

Practices the school will use to promote good choices, including both penalties for infractions and incentives for positive behavior.

MEF focuses on teaching social-emotional skills and our core values to reinforce student intellectual growth with social development. The beginning pages of our proposed discipline policy, Attachment 9, outline the components of our positive behavior approach to student discipline. Our model relies on the investment and commitment of all stakeholders in embodying our core values and working through any growing pains as we teach our children new skills with the belief that they can achieve greatness. The attachment offers a sampling of interventions utilized across our school models. However, as described previously in the School Culture section, these interventions and incentives are adapted and modified to accommodate for maturity and age-appropriateness as students progress.

A list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively.

While MEF plans to implement its own discipline policy, with respect to zero tolerance offences and related expulsions, we will adopt the same policy as MPS. On Page 11 of the draft discipline policy, we begin to outline the categories of infractions, from minor to severe, and our expectations for interventions. As evidenced throughout this application, MEF believes strongly in caring
for the whole-child by implementing restorative justice, teaching social-emotional skills and harnessing the positive. With additional interventions, such as Advisory Mentors and our Student Support Teams, we strive to reduce suspensions and expulsions of our student demographics. However, we know that to establish and maintain a safe environment for all students, suspension and expulsion may occur. Offenses that may result in a suspension can be found on page 13 under “Major to Severe Disruptions.”

An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.

A student identified as an individual with disabilities or for whom the school has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Act (IDEA) or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 (Section 504) is subject to the same grounds for suspension and expulsion and is awarded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. The school will follow Section 504, the IDEA, and all federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom the school has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process.

Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation or disciplinary rules or regulations, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students with disabilities who are expelled or out of school for more than ten days.

MEF has taken great care to create a fair and just suspension and expulsion policy that provides due process for the student and accounts for providing services to students with disabilities in the case that they are needed.

The procedure for student suspension and expulsion, along with the appeal process, is outlined in Attachment 9, beginning on page 1.

Section N, Special Procedures for the Consideration of Suspension and Expulsion of Students with Disabilities, on page 18, addresses how we plan to provide services for students with disabilities who are expelled or out of school for more than ten days.

Provide, as an attachment (Attachment 9), how students and parents will be informed of the school’s discipline policy.

MEF partners with families in our work to create a safe learning environment. In accordance with Alabama Section 16-28-12,[2] MEF will adopt a school discipline policy and deliver a copy to every parent or guardian before the school year starts. Attachment 10 serves as our documentation that parents/guardians have read the policy and agree to the terms.

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## 11. Parent and Community Involvement

### Section Evaluation

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**Final Rating:** Meets or Exceeds the Standard

The local LEA has expressed a desire to engage a charter school or schools to collaborate on a transformation of a feeder pattern as a key part of an overall intervention strategy.

The primary role parents and community members have had to date is in expressing their desire for high quality schools and the difficulty in securing equitable opportunities for their children. Our Network Nights (explained below) and our pre-k advocacy support work have brought us close to many families and parents who are struggling with what to do to ensure a quality education for their children. MEF is known for its role in advocating for students and families and its support of district schools and this has allowed us direct access to families who have concerns about public education in Montgomery. Additionally, the demand for our summer school programs (Brain Forest, for ex.) grows every year. The cumulative expression of hundreds of MPS families, through these multiple touchpoints, tells us they want equally effective programming during the regular school year and greatly informs our initiative.

MEF has also created a Community Collaborative Group comprised of current and former residents and clergy in the school zone, parents with charter school experience elsewhere, local business persons, and K-12 education experts. This group is specifically designated to help shape the vision of the school, add perspective to the challenges faced by students and families, and assist in the selection of a high quality and culturally relevant Charter Management Organization.

Additionally, we have letters of support (see Letters of Support Attachment) including parents of students who are supportive of our work as well as community leaders, and others from across the county. There is clear evidence of demand for recognized quality schools, more choices, and a prioritization of those choices to be close to home. Our conversion school strategy addresses all of those needs, and MEF is optimistic about leveraging our reputation for positive and nonpartisan community engagement on behalf of students.

Describe what you have done to assess and build parent and community support for your school and how you will engage parents.
and community members from the time that the school is approved through opening.

MEF has a long history of parent and community involvement and it is a strength we are excited to bring to the conversion school process. Our respected role in the community has created productive forums for honest, open, and collaborative discussion leading to better planning and implementation that has been communicated effectively. We are also hopeful our broad base of support from our teachers, our mentors, our board members, and the thousands of families we have served with direct educational programming will provide for a uniquely collaborative effort to bring about lasting transformative change to schools.

Operating a public school is a continually earned responsibility that applies to district schools and charter schools alike and MEF begins the conversion process from a strong position. Our success and reputation at MEF over the last several years has been built by our approach to supporting communities, families, and students, and is guided by our three tenets of community engagement – tenets that must be ongoing, and not solely during planning and startup of a program or service or school. These tenants are:

- Listen to the community
- Identify co-owned dreams and goals
- Commit to collaborative work and co-owned goals and work with ongoing communication and transparency.

As a primary example of the work to build parent and community support, MEF, in partnership with Montgomery Public Schools, has developed the We C.A.N. Network – an opportunity for Montgomery citizens to come together for real conversation followed by real action. Our Network Nights are held in schools throughout the district and invite all stakeholders to the table. School leaders, educators, students, parents, local business owners, clergy, and civic leaders share their goals, challenges, progress and needs with the local community in real time and space.

Over the course of the past 12 months, MEF has participated in several public initiatives to inform the families and community members in the district of the details of our charter conversion plan. These efforts have included, but are not limited to media interviews, public forums, and collaborative public conversations with the following local organizations and their membership:

- One Montgomery
- Leadership Montgomery Legacy Class
- Leadership Montgomery Torch Bearers Class
- MPS BOE Work Session Presentation
- Baptist Minister’s Union
- MEF Charter Conversion Public Forum
- Downtown Business Association Education Forum
- Montgomery Chamber of Commerce Charter School Forum
- MGNX Informational
- BONDS
- Radio Interviews with - WVAS and WKXN radio
- Television Interviews with - WAKA and WSFA
- Montgomery Advertiser Conversion Charter Articles and Interviews

Given the delicate nature of conversion schools additional ongoing Network Night events will be established at each school where the conversion approach will be shared. This will allow for parent and community interaction prior to the start of school in 2020. Three phases of the engagement will include:

- Informing the discussion. Asking the community in via private and public forums to share their opinions, beliefs and facts surrounding conversion charter schools. Listening to the community to understand the beliefs and opinions, sharing facts and making sure there is a shared understanding of what a conversion is and is not. Conducting surveys and door to door outreach to gather information to inform and support the conversion process.
- Utilizing the Network Nights as the venue for the community to share their “hopes and dreams.” These events are designed as listening events to hear from families what they want for their children and their schools.
- Regularly scheduled Network Nights are utilized as community planning sessions to share and update the community and parent about school planning efforts leading up to the opening of the school. There will be opportunities to meet leadership,
board members, ask questions, learn about the school model and approach, and provide feedback. These sessions will also be designed to help create a planning committee to ensure close collaboration between the community and the board.

Describe how you will engage parents in the life of the school (including any proposed governance roles described in Act 2015-3). Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school will seek from, offer to, or require of parents.

The school will continue to actively involve parents in volunteerism, advisory council roles and upon approval, in board governance roles in accordance with state law. The involvement of parents and community members is essential and the school embraces this through its commitment to professional learning and transparency.

Volunteerism and Support

Parents will be engaged in the school in ways that provide for effective communication, direct feedback, and opportunities to support students and school activities. These can be on field study excursions, before or after school, or in other programs the school may develop. Open houses, enrollment fairs, and school events all provide opportunities for parent and community involvement. Additionally, parent surveys will be conducted each year and regular events at the school will provide for additional parent feedback opportunities. We do not plan to require parent volunteer hours but will ask parents to make nonbinding commitments of time and support. Above all, we strive to make our schools welcoming spaces where parents are comfortable visiting, participating, and supporting.

Community and Parent Collaborative Group

As the conversion initiative unfolds, each school will include a community and parent collaborative group which meets on a regular schedule (similar to a PTA) and has access to the principal and leadership team. This council is an advisory body and not a governance body but is anticipated to play a highly effective role in ensuring staff and parent and community interaction is positive and collaborative. The council will be involved in Network Nights and in advocating for any needed support the district may provide as well as providing a constructive voice to the school in gathering and assessing community needs and feedback.

Governance

If approved, and in accordance with Act 2015-3 Section 4 (10), the board of directors of the school will include 20% parent representation by parents of students. Per the statute, the 20% will come from parents of students who attend or have attended the public charter schools for at least one academic year. Prior to the first day of enrollment, this requirement may be satisfied by parents who intend to have their students attend the public charter school.

Ongoing School Activities and Communication

School leaders and staff members will invite parents to the school on numerous occasions throughout the year. Each school hosts parent information sessions in the summer and open houses in the fall and spring. Report card nights/days occur at regular intervals and allow for parents to come to the school to meet with teachers and discuss their child’s progress. Families are invited to attend biweekly school celebrations, field trips, performances, showcases, athletic events, and extracurricular activities. Information is provided to parents through a variety of ways, dependent on the information being disseminated. Announcements and basic school information will be sent home in written form every week via weekly notes. The school also anticipates the use
of automatic calling and texting systems as well for more urgent and/or pertinent informational dissemination. Parents are also informed of news, concerns, and achievements for their individual child or children via personal letter, phone call, text, or email from teachers, leaders, and support staff as well.

Discuss the community resources that will be available to students and parents. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments.

MEF is developing an extensive network of community resources, higher education partners, and corporate partners that will be available to support the school, students, and parents in many ways. Please see our letters of support attachment for these partners, their support letters, and the capacity they bring to supporting the students and families served by this proposal.

The school will have access to a range of community resources, including direct programming from MEF and the creation of additional partnerships with institutions of higher education, museums, and corporate partners. College trips are essential to the school’s mission and partnerships with local and out of state colleges to host students for daily field trips to experience college campus life is essential. The school will continue to provide services that are provided for via existing grants and will work to increase those services.

Examples

1. Existing MEF programming. MEF serves thousands of students each year and is committed to expanding its programming to ensure full access to all students of the school. (Brain Forest and STARBASE, among other programs).
2. Teacher professional development. MEF Conversion Schools will be partnering with AUM and Faulkner University to provide teacher practicum experiences and additional PD for teachers.
3. Funder relationships. MEF has a history of successful fundraising and will continue to support the school in this manner and provide additional resources to benefit students and families.
4. Cultural and historical opportunities. MEF has relationships with the local libraries, key museums, hospitals, and other social service providers. Each of these will encouraged to deliver services to families at the school and welcome students to their locations for additional support and experiences.
5. The school plans to continue existing community partnerships and services that are provided at the school under existing relationships (before and after school programming, community gardens, healthcare screenings, food distribution, voting locations, etc.).

Attachments

Section 11: Parent and Community Involvement

– No Attachments –

Notes

Kristy Hatch, 9/23/19 6:46 PM:
Please state clearly how the school boards will be designed. Will there be one board for each school or one for the feeder pattern. Also, please provide a timeline for when the 20% make-up of parents will be accomplished.

Ann Sikes, 9/24/19 3:48 AM:
One school board will serve the feeder pattern made up of the three schools. Per the 2015 ACT, the 20% composition of the board will be in place prior to the opening of the school.

12. Educational Program Capacity

Section Evaluation

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Educational Program Capacity

Key members of the initial leadership team that will be directly involved in the school include:

- MEF President and Executive Director, Ann Sikes. Mrs. Sikes is a skilled executive and champion for public education, and during her time at MEF has led its expansion of educational programming (Brain Forest, STARBASE), positioned MEF as a key voice in advocating for pre k services and summer opportunities for youth, and has developed the We C.A.N. Network in partnership with the local district and holds network nights in schools across the district throughout the school year.
- MEF board chair, Paul Hankins. Mr. Hankins is a retired Air Force General, longtime Montgomery resident and tireless advocate for public education, and alum of the Broad Urban Superintendent’s Academy. For the last twelve years he has led the Alabama Association of Independent Colleges and Universities (AAICU) where he has ensured strong connections between post-secondary and k-12 institutions and expanded the scholarship fundraising efforts for students attending 14 different colleges and universities.
- Chris Reynolds, former CEO of LEAD Public Schools. Mr. Reynolds has helped develop, startup, and manage ten charter schools over the last fifteen years including three conversion schools. He worked closely with Metro Nashville Public Schools and Lipscomb University to develop a groundbreaking partnership between a local district and a charter network that resulted in the first conversion school in Tennessee, Cameron College Prep, being transformed into a top 5% school.
- Dave Borden, CPA. Mr. Borden is a partner of a large regional CPA firm and a local leader well known for his community service, particularly as it relates to education. As a former Montgomery County school board member he understands the needs and complexity of this work and will play a key role in advising both the school and the local LEA as the partnership grows.

The leaders noted above provide a strong base of expertise and directly relevant management needed for a project proposal of this nature. They bring direct experience in school leadership, administration and governance as well as curriculum, instruction, and assessment. In addition, their roles with charter schools, past and current collaborations with local districts, including Montgomery Public Schools, provide the ability to ensure high quality performance management while also building on a strong base of existing parent and community engagement support through the extensive relationships and programs of the Montgomery Education Foundation.

MEF has carefully arranged this leadership team to ensure local leadership for the conversion partnership is identified in advance and also to ensure, if approved, plenty of expertise for recruiting, hiring, and supporting a principal and other school leaders.
MEF has fully implemented its talent recruitment and staffing activities. MEF has a web portal that is accepting applications for Principal and Teacher roles and can be visited here https://montgomeryeducationfoundation.applytojob.com/.

In addition, a full suite of recruiting and interviewing materials, evaluation rubrics, demonstration lessons, job descriptions, and candidate persona and evaluation materials have also been prepared.

These resources are extensive, are already in use, and can be found here:

Attachment 11
Attachment 12
Attachment 13

The Alabama Choice and Opportunity Act does not require a principal be identified in advance as a condition of approval.

MEF and its staff and leadership are not only knowledgeable of the schools that make up the Lanier feeder pattern they serve students in the schools on a regular basis and provide annual analyses on the academic results across Montgomery, including the schools covered in this proposal. MEF provides both school year and summer programming to many of the students including all of the 5th graders (STARBASE), hundreds of students through the BrainForest summer educational programs, and as hosts Network Nights through the We C.A.N. Network in partnership with the local school district. Conversion schools are capable of extraordinary impact and lessons learned from places like Memphis, Houston, Nashville, Philadelphia, etc. all indicate that local knowledge and relationships are keys to successful collaboration and long-term success. MEF is uniquely qualified to design and execute this conversion model in close collaboration with the local community, higher education partners, and brings the knowledge that years of local work on the ground with students and families provides.

Please see our letters of support attachment as evidence of a range of community, business, and local support for this proposal.

A variety of partners engage in work with current MEF programs. Both existing and new partnerships will be an important part of each of the conversion schools. It is anticipated that each of the partners listed below will continue providing the same supports / resources for the charter conversion schools. Partners and their current roles include:

**Alabama Best Practices Institute** - Professional Development for the Brain Forest and staff and teachers for the conversion schools.

**Faulkner University** - Staffing summer learning program. The University was a critical partner in encouraging this application and has expressed a desire to utilize the charter school for practicum and student teaching opportunities. In addition, the school will provide curriculum and professional development supports. MEF's commitment to extensive support and training to teachers will be a great opportunity for continued collaboration.

**Auburn University Montgomery** - Staffing summer learning program. The University has expressed a desire to utilize the charter school for practicum and student teaching opportunities. In addition, the school will provide curriculum and professional development supports. MEF's commitment to extensive support and training to teachers will be a great opportunity for continued collaboration.

**EAT South - Urban Garden Program** - Provides hands on learning utilizing school based gardens. The facilities at the Lanier schools are prime for school based gardens and this partnership has tremendous potential to serve not only the school but the community as well.
Museum of Fine Arts - Arts enrichment and curricular support to the electives program.

National Society of Black Engineers - Assist in designing STEM based enrichment projects.

BBVA Bank - Provides a hands-on financial literacy class for students.

Open eBooks – Open eBooks is a partnership between the Digital Public Library of America, The New York Public Library, and First Book, with content support from digital books distributor Baker & Taylor. Every child will have electronic access to a rich, high quality library of e-books that can be accessed from a smart phone, tablet or computer.

Maxwell Air Force Base – Volunteers and mentors for the Starbase STEM program.

BONDS – Building our Neighborhoods Developing Success has supported ongoing community engagement and outreach in partnership with MEF. BONDS has been helpful in working with neighborhood associations throughout the city and gathering neighborhood leaders for critical conversations.

School Leader

Given the transformational potential of this proposal, and the need to ensure local outreach as part of the leadership search we are awaiting approval to officially begin the search and evaluation of a principal to lead the first elementary school. Upon approval, the ability to recruit and hire a skilled leader improves greatly to ensure a broad search results in a strong leader and skilled school level leadership team. Our objective is to utilize an approved charter for a truly transformational strategy to recruit and hire a great leader and senior leadership team. See Attachment 11 for the principal/head of school.

See Attachment 12 for the job description and qualifications, timeline, criteria, and recruiting and selection process for the school leader.

See Attachment 13 for the job description and qualifications, timeline, and recruiting and selection process for the school’s leadership/management team beyond the principal.

Attachments
Section 12: Educational Program Capacity

– No Attachments –
OPERATIONS PLAN AND CAPACITY

1. Legal Status and Governing Documents

Section Evaluation

Final Rating
Meets or Exceeds the Standard

Legal Status and Governing Documents

Montgomery Education Foundation is a 501 c 3 nonprofit corporation and the IRS determination letter and proof of incorporation in the state of Alabama is included in Attachment 14. Also included, in Attachment 15, are the following board policies:

1. Child Youth Protection Policy
2. Conflict of Interest Policy
3. Whistleblower Policy

MEF bylaws are found in Attachment 17

Entity Organization Chart

MEF will hold the charter for each conversion school and that entity will be legally responsible for adherence to state law and school performance. The MEF board will include at least 20% parent board membership (as required by Alabama law) and this entity will approve the management contract for each provider selected to manage the school.

Attachment uploaded to this section - Entity Organization Chart

Attachments

Section 1: Legal Status and Governing Documents
Notes

Kristy Hatch. 9/23/19 6:46 PM:
All of the board policies seem to be incomplete. Please provide a timeline for expected completion.

Ann Sikes. 9/24/19 3:51 AM:
Upon approval, MEF will move forward to update and implement all required polices. All board policies and manuals will be completed and in compliance with any requirements by July 2020.

2. Organization Chart

Section Evaluation

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School Organizational Chart

The school level organization chart is included in Attachment 16. While this structure is planned for Davis Elementary, we expect the structure to be similar for all schools, with appropriate adjustments made for middle, and autonomy reserved for the operator to modify to meet their performance objectives and ensure fidelity to their specific school model. For example, The elementary school may have aides or second teachers in some classrooms. There may also be grade level and content level chairs at the middle school v. just grade level chairs at the elementary school level. The principal is the leader of the school and has three key direct reports: one or more assistant principals, a director of operations, and an instructional coach and director of professional development. The school’s commitment to professional development and teacher training is evidenced by a leadership role for the director of professional development and coaching.

Each contracted operator will have autonomy to modify the organization chart to meet the needs of the students and community and also to ensure fidelity of implementation to any unique elements of their respective school model.
Each school will have a parent and community advisory council that provides critical feedback to the school and functions to oversee grassroots fundraising and other supportive activities of the school and the Board of Directors. It also serves as a conduit to bring community voice to school leadership and, similarly, to advocate for school priorities in the community.

Within the school are two key structures that ensure strong management and a clear focus on students and academic outcomes. One, all school operations are led by a Dir. of Operations that frees the principal up to focus on leadership, instruction and coaching. Two, to support rigorous instruction and effective teacher coaching, each grade has a teacher that serves in a leadership development role (grade level chair) and is accountable to the principal and assistant principal for performance of the staff in that grade and adherence to the vision and mission and instructional practices of the school. This role also ensures distribution of formative data to the grade level team, works with the counselor and director of PD to ensure effective teacher training, planning for data days, and consistent implementation of the culture, SEL, and discipline systems. Content chairs exist in the middle school model and are similar to the grade level chairs but are solely focused on ensuring rigorous, aligned content is taught in all grades. They are also key members of the instructional coaching team and revise and re-align curriculum and other teaching resources each year. By allowing the student facing staff to focus on instruction and the operations team to focus on non-instructional support of the school we are able to ensure a higher level of training to staff, effective support for rigorous instruction in the classroom, and learning opportunities for future leaders.

School Organization Chart - see Attachment 16

Attachments
Section 2: Organization Chart

– No Attachments –

3. Governing Board

Section Evaluation

Final Rating
Meets or Exceeds the Standard

Governing Board

Montgomery Education Foundation will hold the charter for each school, approve management contracts with any school operator, be accountable for compliance with the terms of the charter contract, including school performance, financial reporting, and operation in accordance with Alabama law. The board will include 20% parent participation in accordance with Alabama law.

Bylaws - Attachment 17

MEF bylaws state the number of board members shall be at least 3 and not more than 30. Board member terms are three years and are initially staggered from one to three years and no member shall serve for successive terms extending beyond nine years.
The current board has 4 members, is supported by an interim Advisory Committee of 16 and benefits from a broad range of expertise including curriculum, fundraising, HR, finance and accounting, community involvement and local business leaders. The diversity and experience of the board and the advisory committee is a significant strength and provides the capacity to adjust and react to challenges as they may occur. The interim advisory committee is in place to provide broad assistance and support during the application and start up process.

The board will oversee the contracted school operator and be accountable under Alabama law for performance and compliance of the school. All legal, financial, and obligatory actions of the school that require approval will be made by the board. In addition, approving contracts over a certain threshold, hiring the school director or a non-profit entity to manage the school will be made by the board. Discipline appeals, grievances, etc., after due process, will ultimately come to the board for final decision.

The board will evaluate interim results and leading indicators (enrollment, attendance, discipline rates, and mid-year assessment data, etc.) throughout the year. Annually, the board will review an evaluation of each school's overall performance, prepare an annual report, and provide strategic guidance, community support, fundraising, etc.

The parent and community advisory committee is designed to provide support to the principal and school level leadership team throughout the year and is evidenced in the school level organization chart. Membership of this group is voluntary and may change from time to time.

School Level Structure and Hiring

The board hires the management company to run the school. The management company, in turn, hires the principal. The principal hires all school level staff in accordance with protocols established by the management company. This simple, effective structure is a best practice in charter school design and allows for as many decisions as possible to be pushed to the school or operator level while ensuring an appropriate blend of autonomy and accountability.

In addition, a parent and community advisory council for each school will be developed that provides feedback, recommendations, and community support to the principal and school leadership.

List all current and identified board members and their intended roles. Summarize members’ interests in and qualifications for serving on the school’s governing board. Provide full resumes.

MEF Board of Directors

MEF has a strong board that represents a broad range of functional expertise. Each member is carefully evaluated and selected via a nominating process that ensures key skills are represented and each member has a deep commitment to public education in Montgomery and believes in the mission and values of MEF. The chart below lists current board members as well as members of the non-voting Interim Advisory Committee. Board member and Advisory Committee resumes are included in Attachment 1 and 1a.
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<td>Dave Borden</td>
<td>Aldridge Borden &amp; Company</td>
<td>VICE CHAIRMAN</td>
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<tr>
<td>3</td>
<td>Jay Love</td>
<td>Business Education Alliance, Business Council of Alabama</td>
<td>SECRETARY / TREASURER</td>
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<tr>
<td>4</td>
<td>Caroline Novak</td>
<td>A+ Education Partnership</td>
<td>MEMBER</td>
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**INTERIM ADVISORY COMMITTEE**

**NON-VOTING**

<p>| 1 | Gary Cobbs | YMCA of Greater Montgomery | Advisory | Non-profit manager |
| 2 | Lee Farrow | Auburn University Montgomery -- Center for Excellence in Learning and Teaching | Advisory | Post Secondary Education, development |
| 3 | Cathy Gassenheimer | A+ Education Partnership Center for Best Practices | Advisory | Elementary and Secondary Development |</p>
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<td>Emerge Business Solutions and Auburn University Montgomery</td>
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<td>Post Secondary Instruction Management, Charter School Committe</td>
</tr>
<tr>
<td>5</td>
<td>Dr. Angel Leonard</td>
<td>Department of Human Resources</td>
<td>Advisory</td>
<td>Child, Adult and Family</td>
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<tr>
<td>6</td>
<td>Ann McCurdy</td>
<td>Curriculum Associates, Inc.</td>
<td>Advisory</td>
<td>Curriculum, special ed</td>
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<td>7</td>
<td>Lora McClendon</td>
<td>Montgomery Area Chamber of Commerce</td>
<td>Advisory</td>
<td>Governmental Affairs</td>
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<td>8</td>
<td>Mac McLeod</td>
<td>City of Montgomery Department of Development</td>
<td>Advisory</td>
<td>Governmental Affairs, Early Childhood Education</td>
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<tr>
<td>9</td>
<td>Paulette Moncrief</td>
<td>Retired from Head Start and Montgomery Public Schools</td>
<td>Advisory</td>
<td>Former elementary principal of Early Childhood Program</td>
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<tr>
<td>10</td>
<td>Dawn Owens</td>
<td>Tandem Early Education Consulting, LLC</td>
<td>Advisory</td>
<td>Early Childhood Education</td>
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<td>11</td>
<td>Trey Sippial</td>
<td>Sippial Enterprises, Inc.</td>
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<td>12</td>
<td>Lisa Stevens</td>
<td>Community Member</td>
<td>Advisory</td>
<td>PTA</td>
</tr>
<tr>
<td>13</td>
<td>Galen Thackston</td>
<td>Goodwyn Mills and Cawood</td>
<td>Advisory</td>
<td>Engineer</td>
</tr>
</tbody>
</table>
This application is being submitted by Montgomery Education Foundation. The board already has existing policies in place regarding conflict of interest, whistleblower, and child protection. Upon approval, the current bylaws and policies will be reviewed to identify any updates that need to be made to the bylaws and/or policies no later than three months prior to the opening of the first school. Upon approval, MEF plans to implement board training and will ensure an effective board member orientation process that clarifies the responsibilities and expectations of each board member as they relate not only to MEF but also to the responsibilities carried by entities operating charter schools under the Alabama School Choice and Opportunity Act.

The timeline for this training will occur between such time as this proposal is approved and the beginning of school in 2020. As new board members are added they will receive specific orientation regarding the charter application itself and the Alabama charter law. We will work with the state department, national organizations like Board on Track, and the local LEA to ensure this training is appropriate and effective.

Explain the procedure by which governing board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.

Montgomery Education Foundation is a self-perpetuating board and a nominating committee recommends new and replacement board members. MEF will be focused on nominating members with broad representation of key stakeholder groups. It is anticipated that the board will be made up of a total of 7-9 members. 20% of these members will be parents or guardians of students and up to three members will be appointed Montgomery ED The board typically meets quarterly and additionally as necessary. It is anticipated that upon approval, board meetings would be held monthly.

The board may create committees as needed or required.

Describe how the governing board will provide evidence of its compliance and adherence to the Alabama State Ethics Law, Open Meetings Act, Public Records law, and all other specific state laws referenced in Act 2015-3, if applicable.

Board members will receive training related to the Open Meetings Law, Alabama State Ethics Law, Public Records Law, and other specific state laws referenced in Act 2015-3, if applicable. Training/update process will be implemented on an annual basis.
Identify any existing relationships that could pose actual or perceived conflicts of interest if the application is approved. Discuss specific steps that the governing board will take to avoid any actual conflicts and to mitigate perceived conflicts.

At this time there are no identified conflicts of interest. It is possible a conflict of interest could occur and if so the organization’s conflict of interest policy (see Attachment 15) provides guidance on how to proceed. At a minimum, board members are expected to notify the board of potential conflicts and the board will then investigate based on the conflict of interest policy and take appropriate action, if any. In some cases, it is possible one or more board members may abstain from a given vote even if a conflict of interest is deemed not to exist.

Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added? How will vacancies be filled? What are the priorities for recruitment of additional board members? What types of orientation or training will new board members receive, and what type of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. If there will be a network-level board, identify any board development requirements relative to the organization’s proposed growth and governance needs.

In addition to the required 20% membership filled by parents within the schools served, it is anticipated that the board will grow to a total of 7-9 members. Recruitment of new board members will include skilled community leaders, business and education experts, and members of the higher education community. Our enrollment outreach and existing community involvement will provide us great access to parents and community members who may be interested in serving on the board. Potential board members will be vetted by a nominating committee as with any other board member and will be screened for their commitment to public education and their belief in the mission and values of MEF Conversion Schools.

Attachments
Section 3: Governing Board

– No Attachments –

Notes

Kristy Hatch, 9/23/19 6:48 PM: Same request as above: Please state clearly how the school boards will be designed. Will there be one board for each school or one for the feeder pattern. Also, please provide a timeline for when the 20% make-up of parents will be accomplished.
Advisory Bodies

Each school is expected to have a Parent and Community Advisory Council that supports the school and provides critical feedback to the principal and management team. The composition of this council is expected to have parents, community members, and other individuals (business and faith leaders, for ex.) who are committed to supporting the mission of the school and have local knowledge and relationships in and near the school community. MEF plans to leverage its enrollment activities and broad relationships in the community to identify key stakeholders to serve on this advisory committee. At least one third of the members are expected to be parents and another third are community leaders with an address in the feeder pattern. This is an advisory body and not a governing body and positions are voluntary and unpaid. Meetings are expected to occur approximately 4 - 6 times per year.

Attachments
Section 4: Advisory Bodies

- No Attachments -

5. Staff Structure

Section Evaluation

Final Rating

Meets or Exceeds the Standard

See Attachment 18 for a detailed staffing model.
Explain how the relationship between the school’s leadership/administrative team and the rest of the staff will be managed.

The principal of the school has three senior leadership team members and this group of four comprise the senior leadership team of the school. The principal supervises the assistant principal, the dir. of professional development, and the dir. of operations. The assistant principal supervises the special education coordinator, the counselor, and at least two grade level chairs. The principal and dir. of professional development also supervise at least two grade level chairs which ensures the intensive coaching model is properly distributed and teacher evaluations are able to be conducted by staff who have experience working with a cohort of teachers. The dir. of operations manages the community engagement coordinator, the office staff, and the data and assessment coordinator as well as serving as the primary liaison with LEA staff to ensure effective transportation, maintenance, food service, nursing, etc.

Uploaded Attachment to this section - School Organization Chart

Attachments

Section 5: Staff Structure

5.1 School Org Chart Sikes, Ann, 9/16/19 5:35 PM PDF / 197.863 KB

Notes

Kristy Hatch, 9/23/19 6:49 PM:
Please provide clarification for attachment 18 to make the FTE numbers more clear.

Ann Sikes, 9/23/19 8:48 PM:
Attachment 18 includes all positions for each school. The first column is the planning year and the 0.5 FTE for Dir. of Operations evidences that position will be hired 6 months prior to the beginning of school. The Community Engagement and the Principal roles are budgeted to be hired a full year in advance, thus a 1.0 FTE for those positions.


<table>
<thead>
<tr>
<th>Section Evaluation</th>
<th>Final Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Partially Meets the Standard</td>
</tr>
</tbody>
</table>
Staffing Plans, Hiring Management, Evaluation

Explain the relationship that will exist between the proposed school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. Provide, as an attachment (Attachment 19), any personnel policies or an employee manual if developed.

All employees will be at will and no employment contracts are anticipated. Staff will receive offer letters indicating their planned roles for the year but are subject to change. Attachment 19 describes the personnel policies and serves as the employee handbook. These policies may be superseded by policies in place or approved by the selected operator of the school.

Outline the proposed school’s salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school’s strategy for retaining high-performing educators.

The proposed salary schedule is included below. MEF Conversion Schools will pay at or above the state minimums required in Alabama and may from time to time include bonuses, stipends, and other forms of compensation as funding resources allow. Staff and teachers will be paid levels that are related to experience, demonstrated positive academic outcomes with students, and other relevant educational or career experience, and are expected to equal or exceed local compensation rates for similarly qualified personnel. A standard benefit package either through the LEA or secured by the school itself will be provided to all full-time employees and other part time employees on a pro rata basis or as allowed or required by law. Benefit plans will include healthcare, pension/retirement, sick leave, and paid time off.

Attracting and retaining high quality staff is essential to long term performance. Each staff member will receive annual evaluations and participate in goal setting and professional development planning meetings. MEF anticipates it may be necessary to utilize signing bonuses, performance bonuses, retention bonuses, or other mechanisms to retain the very best staff members and has included $40,000 - $50,000 in bonuses and stipends in each year of the budget. Average salaries for key positions are listed below.

<table>
<thead>
<tr>
<th>Administrative Staff</th>
<th>Avg. Salary</th>
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<tbody>
<tr>
<td>Principal/School Leader</td>
<td>90,000</td>
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<tr>
<td>Dir. of Operations &amp; Budget</td>
<td>60,000</td>
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<tr>
<td>Assistant Principal</td>
<td>60,000</td>
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<tr>
<td>Dir. of Professional Dev.</td>
<td>55,000</td>
</tr>
<tr>
<td>Position</td>
<td>Avg. Salary</td>
</tr>
<tr>
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<td>-------------</td>
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<tr>
<td>Special Education Coord.</td>
<td>45,000</td>
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<tr>
<td>Clinical Behavior Interventionist</td>
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</tr>
<tr>
<td>Counselor</td>
<td>45,000</td>
</tr>
<tr>
<td>Community Engagement Coord.</td>
<td>45,000</td>
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<tr>
<td>Office/Reception</td>
<td>20,000</td>
</tr>
<tr>
<td>Data &amp; Assessment /Fed. Programs</td>
<td>45,000</td>
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<tr>
<td><strong>Instructional Staff</strong></td>
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</tr>
<tr>
<td>Teachers Pre k</td>
<td>35,000</td>
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<tr>
<td>Assist. Pre k</td>
<td>20,000</td>
</tr>
<tr>
<td>Teachers k-2</td>
<td>45,000</td>
</tr>
<tr>
<td>Teachers 3-5</td>
<td>45,000</td>
</tr>
<tr>
<td>Teachers 6-8</td>
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<tr>
<td>Teachers 9-12</td>
<td>45,000</td>
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<tr>
<td>Sp. Ed. Teachers</td>
<td>45,000</td>
</tr>
<tr>
<td>Reading/Math Specialists</td>
<td>45,000</td>
</tr>
</tbody>
</table>
Describe the proposed school’s strategy, plans, and timeline for recruiting and hiring the teaching staff. Explain other key selection criteria and any special considerations relevant to your school design.

MEF believes that transformational outcomes are only possible with a mission aligned high performing staff. As such, we will focus on hiring the most well-trained and qualified teaching staff available, seeking the best educators in Montgomery, elsewhere in Alabama as well as out of state. Particular attention will be given to diversity, commitment to the mission, vision and desire to serve all students. Ultimate hiring is the responsibility of the organization managing the school, but we have developed a default process MEF is prepared to use.

The interview process will have multiple steps. First, interested applicants will complete an application and provide a resume and any college and graduate-level transcripts. Applicants will be encouraged to submit the application online and upload a resume. Second, following a review of applicants, qualified candidates will receive a phone interview to determine their fit within the MEF mission, vision, and purpose. Third, an in-person interview will be scheduled where the candidate will prepare a lesson plan based on a “typical day” at MFE and its curriculum. Fourth, top candidates will then be screened for background checks and reference checks in accordance with Alabama state law for educators.

The Principal will be responsible for managing the interview process. The final decision on hiring will be based upon the recommendation of the Principal and approved by the MEF Board of Directors. It is anticipated if MEF receives its Charter, it will immediately begin the process of recruiting interested administrators and teaching staff.

MEF Conversion Schools shall comply with all applicable federal laws, rules, and regulations regarding the qualifications of teachers and other instructional staff. MEF acknowledges that, after approval, teachers shall be exempt from state teacher certification requirements. Furthermore, the MEF acknowledges that the approaches to earning Alabama Educator and/or Leadership Certification shall be the same as those for individuals in the public local education agencies in Alabama.

Outline the school’s procedures for hiring and dismissing school personnel.

**Staff Hiring and Dismissal**

When the candidate verbally accepts a position, the Principal will send an employment letter containing salary and other pertinent employment information. The candidate’s reply e-mail to that letter will serve as acceptance of his or her employment with MEF Schools that will be followed up by a DocuSign digital signature process. All employees will work on an “at will basis”. This means either the employee or the school may terminate the employment relationship at any time, with or without cause. No person other than the Principal will have authority to enter into an agreement for employment for any specified period of time and any such agreement that is not at-will must be in writing and approved by MEF.

ME incorporates a comprehensive Performance Improvement Plan process during which employees are given support and opportunity to improve in their practice. After designing and monitoring a personal improvement plan, school leadership may decide to dismiss an employee, at which point we will ask the employee to write a brief reflection on their experience at MEF Schools, giving us another opportunity to continuously improve.

Include a statement acknowledging the school’s understanding of the ALSDE, Educator Certification Section, criminal...
history background check process and, if approved, the school’s plan to comply with this process. Information can be found at [www.alsde.edu/EdCert](http://www.alsde.edu/EdCert) (Background Clearance).

**Act 2015-3, Section 9(d)(1).**

Public charter schools shall be subject to the same civil rights, health, and safety requirements, including, but not limited to, state and local public health and building codes, employee fingerprinting, and criminal background checks applicable to other public schools in the state except as otherwise specifically provided in this Act.

MEF Schools acknowledge and understand the ALSDE Educator Certification requirements inclusive of criminal history background checks. We will conduct extensive checks of employment references, educational verification, and Criminal Offender Record Information (CORI) on all applicants prior to extending an offer of employment. Background checks will also be performed through the MPS office or via an independent third-party service prior to employment.

Explain how the school instructional leader(s)/administrator(s) will be supported, developed, and evaluated each school year. Provide, as an attachment (Attachment 20), any leadership evaluation tool(s) that already exist(s) for the school.

The principal’s effectiveness as a leader is essential to the success of the school and MEF is committed to providing coaching tools, mentors, and collaborative learning opportunities with various organizations across the city. The MEF board also intends to support travel to best practice schools for the principal and key leaders and to ensure collaborative learning opportunities at local colleges and universities are available.

MEF has adapted the New Leaders Principal Evaluation Process and Rubric[^1] (Attachment 20) to facilitate leadership development and accountability. Other administrators (AP, Dir. of Operations, Instructional Coach, Dir. of PD) participate in an evaluation process similar to that of the Principal with rubrics created with applicable performance indicators taken directly from the New Leaders Principal Evaluation Rubric.

The New Leaders Principal Evaluation Process assesses principals on leadership practice and student outcomes. New Leaders conducted research before defining the core standards and aligning them to the Interstate School Leaders Licensure Consortium standards.[^2] These standards are equally important and interconnected, and are therefore, weighted evenly.

1. Learning and Teaching
2. Shared Vision, School Culture and Family Engagement
3. Strategic Planning and Systems
4. Talent Management
5. Personal Leadership and Growth

Before implementing the evaluation cycle, the Principal, along with MEF’s President, will define what student outcomes will be assessed. A similar process will occur for the principal’s direct reports that make up the school leadership team. The New Leaders Principal Evaluation Handbook provides samples of student-outcomes as well as targets. They suggest that the Principal selects between 8 and 10 measures to get a complete view of school performance without diluting the value of any of them.

**Continuous Improvement Cycle Chart - File uploaded to this section**

Principals will engage in a continuous cycle of improvement. This cycle starts with two foundational activities: data analysis and self-reflection. After a thorough review of previous school data, the Principal is empowered to set and agree on 8 to 10 student achievement goals and review them with the MEF President and decide which core standards of the rubric to prioritize to affect student achievement. The self-reflection exercise reveals areas of growth and specific performance indicators that the Principal...
should focus on to increase his/her effectiveness in achieving the defined student outcomes. Equipped with these data points, the
Principal designs and executes a plan, collecting evidence along the way or implementation and results. At the mid-year mark, the
evaluator completes a site visit and reviews evidence and progress of the Principal’s plan. New Leaders provides a framework for
principal evaluators when conducting school visits that ensure evaluators can make the most of their visit and collect relevant data.
This mid-year formative review revisits the goals and plan, records progress, evaluates the Principal on the rubric and documents
any changes or adjustments in the plan. As the school-year wraps up, the Principal completes a self-assessment and the evaluator
completes the summative evaluation, informed with student outcome data. These two data points provide a foundation as the cycle
begins again.

Explain how educators will be supported, developed, and evaluated each school year. Provide, as an attachment
(Attachment 21), any educator evaluation tool(s) that already exist(s) for the school.

MEF will provide the foundation for a continuous teacher development process throughout the school year, focused on mastery of
specific skills and strategies that most impact student achievement. MEF plans to adopt the Alabama Quality Teaching Standards
as a framework for evaluating and monitoring teacher effectiveness. Attachment 21 provides the rubric and continuum of which our
instructional staff will work to grow and improve. Through our instructional coaching and personal growth plan model, teachers
receive support in development. Necessary improvements to this process will be made prior to each school year. This annual
refinement process will ensure that MEF supports its most valuable resource—great teachers—which in turn will accelerate
student growth and success.

Evaluation

Teachers will be formally evaluated 2 or more times annually based on experience and student growth, and the results will be
recorded with EducateAlabama. Evaluations vary from announced and unannounced - and consist of a pre-conference
(announced), observation, and post-conference. Teachers receive professional development and training on the EducateAlabama
model so that they are aware of expectations in advance. Multiple evaluations allow us to track progress and professional growth
over the course of the year and more. The instructional coaching model we utilize supports teachers’ growth in specific areas and
skills between evaluations.

Instructional Coaching

Each staff member will work with their assigned instructional coach to establish annual personal performance and growth goals,
include within their personal growth plan. Each quarter, the teacher and coach will review progress on professional goals and
make action plans as necessary to ensure the teacher is on track to meet or exceed goals. All coaches will have expertise in a
specific content area. Teachers will be observed a minimum of once a week and provided with 1-2 areas of strength, 1-2 areas for
growth, and 1-2 action steps to work on throughout the following week.

Coaches (leadership staff and peer coaches) will observe their assigned teachers in class the following week to ensure action
steps are implemented, providing real-time support. This will create a continuous cycle of improvement that directly impacts
student achievement on an on-going basis. The key to this model will be that teachers are always practicing and refining skills
instead of receiving an exhaustive list of things to work on only a few times per year. The result of this coaching model will be that
teachers feel continuously supported and see their skills develop over time.

This coaching model is based on the work of Paul Bambrick Santoyo, outlined in Leverage Leadership and utilized at Uncommon
Schools and at high-performing charter schools across the country[^1]. This model provides teachers access to videos, observational
data, feedback notes, and action steps at any time. The resources also contain an online professional development database,
giving teachers access to hundreds of professional development sessions regarding their actions steps and areas for growth. All
coaches will be trained in this model during summer professional development in July/August.

In addition to consistent observation and feedback, all teachers will have quarterly data meetings with their coach to review interim
assessment data and make subsequent action plans to re-teach and/or spiral further instruction on skills and standards not
mastered. These action plans will be living documents and will be revisited/modified each week during the teacher’s weekly
coaching meeting, based on the most recent student mastery data.

**Career Development Opportunities:** MEF is dedicated to opening doors for staff career development in and out of the classroom. Through the professional growth plan developed each year in collaboration with their coach, teachers are able to articulate the areas in which their strengths lie and how they would like to develop them to serve the community as a whole. Some typical opportunities include:

- **Skill, Content Area Expertise:** Teachers aspire to become Reading and/or Math Specialists, Intervention experts or Grade Level or content specific teachers. These teachers become determined to move students and provide a consistent, dependable and experienced core of teachers.
- **New School Environments and Demographics:** Teachers and staff are encouraged to look within the MEF Conversion Schools network for other teaching opportunities. This allows for expert teachers to stay in the network and support the Center’s mission while building their resume and challenging themselves with new classroom experiences.
- **Teacher Leadership:** Teachers matriculate into instructional leadership roles including Grade Level Leader, and Master Teacher. Grade Level Leaders work with their team to build culture, organize grade level recognitions, team meetings and communications with the Leadership Team. The Master Teacher role becomes available when a teacher reaches exceptional effectiveness and desires a role in a leadership capacity. Instead of leaving the classroom to look for leadership opportunities, in the MEF Schools, all teachers will have the opportunity to become Master Teachers, maintaining their role as classroom leaders while serving as the facilitators of model classrooms, sharing resources, acting as a mentor to new teachers and facilitating professional development sessions.
- **Career Advancement:** As teachers grow and develop, there are a variety of roles available for promotion should any vacancies occur or if the school network continues to grow.

As MEF proposes to convert a feeder pattern of schools, teacher retention is paramount to our schools’ and ultimately, the students’ success. Our teacher development program strives to develop expert teachers and leaders. Career and professional teachers become instructional leaders and coaches in our schools and facilitate a cycle of growth and development, feeding a pipeline of instructional leaders. MEF values our alumni and continues to engage with them to support recruitment.

Explain how the school intends to handle unsatisfactory instructional leadership/administrator or educator performance, as well as instructional leadership, administrator, and/or educator changes and turnover.

School operators will have autonomy to hire staff and leaders at each school. MEF has a particular interest in ensuring quality leadership and staff satisfaction and will monitor school operator performance on staffing, hiring, teacher retention etc. It is expected of each operator that in the event that teacher performance is unsatisfactory and the teacher has not successfully implemented necessary improvements, the Principal is expected to collaborate with other leadership staff and the teacher to create an improvement plan that is actionable and time-bound. The Principal will monitor progress of the plan and determine if it has been successfully completed and/or if additional steps are required. Extensive coaching and support are anticipated for struggling teachers, but in the event a teacher is unable to successfully complete the improvement plan or effectively meet the expectations of the role the teacher or staff member may be terminated.

MEF school leadership teams will take great care to ensure minimal disruption to scholar’s experiences and will make every effort not to make instructional staff changes during a school year. We will, however, view each situation individually and make all decisions in the best interest of our scholars. As detailed above, all staff will be hired on an at-will basis. We will make all efforts to notify families of any staffing changes that would directly affect their scholar, but that said, we also recognize that there is a delicate balance between confidentiality and ensuring our community has timely and relevant communication on significant school events.

Similarly, the operator of school will be responsible for monitoring and evaluating the performance of the Principal. The Board’s primarily goal will hiring an operator who will hire and support a high-performing Principal, as this position will be absolutely critical
to success of the school. The board will evaluate the school’s performance on an annual basis and in year 3 will evaluate the operator in order to determine if a change in operator should be made prior to the 5 year renewal cycle. In addition, the quality of the staff the principal hires are of key interest to the board. In the event that his/her performance does not meet expectations, or schoolwide performance is not at expectations, the Board will collaborate with the operator to support the Principal in areas for improvement and collaborate with him/her on next steps and indicators of success. If the Principal is unable to meet those indicators, the operator may replace the principal or the board may request the principal be replaced.


[2] Ibid.


Attachments
Section 6: Staffing Plans, Hiring, Management, and Evaluation

6.1 Continuous Improvement Cycle Chart Sikes, Ann, 9/16/19 5:50 PM PDF / 216.585 KB

Notes

Kristy Hatch, 9/23/19 6:51 PM: Are the units for administration per school, or for the feeder pattern? The numbers exceed the current units provided. Please explain how local funds will provide the difference.

Ann Sikes, 9/23/19 8:40 PM: FTEs per school are based on the default staffing model contained in this application. Total compensation costs are less than recurring revenues. Funding sources include the Foundation Allowance, pre-k revenue, IDEA, Title I, and philanthropy, all of which will be used to fund these positions. The total funding The Alabama Accountability Act allows for autonomy on how to spend and staff a charter school.

Kristy Hatch, 9/23/19 6:50 PM: Please update the employee handbook.

7. Professional Development

Section Evaluation

Final Rating
Meets or Exceeds the Standard
Professional Development

Describe the school’s professional development expectations and opportunities, including the following:

Identify the person or position responsible for professional development.

Dir. of Professional Development is a key leadership role and is responsible for coaching, training, and professional development. The principal, assistant principal, and grade level and content chairs all play essential roles in this function which is central to the essential elements of school design (commitment to professional development). This role is expected to lead the summer training program, collaborate with the principal to set the vision for instructional excellence in the classroom and create supervisor and peer coaching structures to drive excellence in the classroom.

The majority of professional development will be conducted internally or with external partners at other charter school organizations, local colleges and university departments of education, etc. Additional training will be available via participating in programs offered through the local LEA. Examples include attending programs provided by MPS for child-abuse, safety, special education and other mandated trainings. Contracted professional development will be utilized for any specific curriculum training such as Systems 44 for the RTI program that are not already available through the LEA.

Discuss the components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform.

Core Components

Our professional development program consists of the following components:

- **Summer Professional Development and Preparation:** All staff will participate in almost two weeks of summer professional development and training that will include the following sessions: Orientation to the Mission and Goals of MEF Schools; Intensive Standards Study and Curriculum Development; Instructional Tools, Culture, and Management Systems; Support of Scholars with Additional Needs; and Developing a High-Trust Adult Culture. All MEF staff will be trained in cultural awareness and trauma-informed care using Trauma-Sensitive Schools by Susan E. Craig.
- **Wednesday Professional Development:** MEF’s weekly schedule provides 2 hours every Wednesday for continued professional development during the school year. This time allows for professional development in ancillary topics identified based on student data, coaching data, and staff feedback.
- **Common Planning Time:** School Leadership, grade level, and content level teams collaborate in designing schedules to include common planning time for grade level or content teachers. During this time, teachers will plan lessons together, practice key upcoming lessons, provide feedback to each other, and analyze data from student assessments. Bi-weekly, instructional coaches attend these meetings to review student concerns, data, and continue training on instructional strategies. These meetings will inform the school leadership team of trends and progress of the scholars which they can then use to make informed decisions on curriculum, schedule changes, professional development needs, etc.
- **Quarterly Data Days:** Each quarter, following benchmark assessments, teachers will meet with the school instructional leaders to develop plans for re-teaching and remediation as necessary. Data Days will also be used to cover professional development topics/strategies related to action plans.
- **Coaching, Observation, and Debrief Cycle:** Instructional coaching, facilitated by the Leadership Team will include
observations of individual teachers weekly, meeting with them afterwards to discuss strengths and areas for growth and 1-2 action steps to implement in practice. This cycle will provide goal-oriented actions steps for each teacher to implement weekly, as opposed to an overwhelming list of tasks.

- **Evaluation:** Teacher training and PD are essential elements of the MEF Conversion Schools and regular coaching, peer collaboration, and coteaching occur frequently. Non-evaluative observations occur monthly for all teachers and for new teachers as often as weekly. At least twice a year, teachers, including paraprofessionals will meet with their designated instruction coach to discuss overall progress and improvement in a more formal setting. Teachers will also engage in self-reflection and evaluation of their own lessons and work with grade level and content teams to support one another. Through technology, teachers will record whole group and small group instruction, completing a self-evaluation utilizing the same evaluation rubric as implemented by the Leadership Team. These evaluations and videos will be shared with the instructional coach and used for determining future professional development or coaching focuses. At the end of the year, the professional growth plan will be revisited with the teacher to begin planning for the subsequent year.

Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how educators will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.

For two weeks prior to the beginning of school, all staff are required to participate in preparatory activities and professional development. Leadership will report three weeks in advance. Our commitment to intensive Summer Professional Development ensures that all staff begins the year ready to work as a tightly knit team and prepare to deliver the high quality educational experience promised to all families. This two-week session is designed to align all staff to the core principles, values, mission, and long-term vision of the school, needs of our students, for our scholars and families. Throughout the year, teachers will receive additional support on the topics and skills presented during summer professional development during weekly PD sessions or as arranged by the dir. of professional development. We operate knowing that any topic that needs more time can be revisited during weekly professional development sessions or full day PD days throughout the year.

### Sample Summer Professional Development Agenda

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Delivery</td>
<td>Quality execution of lessons maximizes the quality of learning</td>
</tr>
<tr>
<td>Unpacking Standards and Developing Curriculum</td>
<td>Teacher clarity regarding what students need to know and be able to do</td>
</tr>
<tr>
<td>Trauma-Sensitive School</td>
<td>Staff training on recognizing triggers of trauma and practicing management and engagement strategies to protect scholars that act out and/or withdraw</td>
</tr>
<tr>
<td>Cultural Awareness/Responsive Teaching</td>
<td>Getting to the heart of understanding each other and our respective cultures, from a stratégie perspective</td>
</tr>
<tr>
<td>Student Support Services</td>
<td></td>
</tr>
<tr>
<td>Topic</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>General, IEP, 504</td>
<td>Systems related to identification, structure, service delivery, process, resources, legalities.</td>
</tr>
<tr>
<td>RTI²</td>
<td>Detailed procedures for structure, identification, process, progress monitoring.</td>
</tr>
<tr>
<td>Data Driven Instruction</td>
<td>Improving outcomes through careful analysis of data and action planning in response.</td>
</tr>
<tr>
<td>Teaching EL Scholars</td>
<td>Development in understanding the challenges and overcoming with teaching EL students.</td>
</tr>
<tr>
<td>Lesson Planning</td>
<td>Quality instruction begins with effective planning.</td>
</tr>
<tr>
<td>Teacher Coaching and Evaluation</td>
<td>Ongoing coaching and evaluation is instrumental in increasing quality and efficacy.</td>
</tr>
<tr>
<td>Assessments</td>
<td>Understanding the processes and timeline related to administering major school wide assessments.</td>
</tr>
<tr>
<td>Student Investment</td>
<td>Helping teachers understand how to get students to invest in their own outcomes and progress.</td>
</tr>
<tr>
<td>Classroom Management</td>
<td>Quality classroom management ensures maximum focus and time on student learning.</td>
</tr>
<tr>
<td>Family Engagement</td>
<td>Parents are the student’s first teacher, families and staff work as a team for student success, and families are aware of available support services</td>
</tr>
<tr>
<td>Mission, Vision, School History</td>
<td>Keeping the vision at the forefront of instruction and interaction with students and parents, maintaining motivation.</td>
</tr>
<tr>
<td>Staff Norms, Expectations, and Culture</td>
<td>Individual responsibilities to each other, the team, and the entire MEF community as an organization.</td>
</tr>
<tr>
<td>School-Wide Expectations</td>
<td>Clarity from day one as to school-wide student expectations vs. individual classroom expectations to support culture and student learning.</td>
</tr>
<tr>
<td>Student Leadership Development</td>
<td>Helping teachers integrate student leadership, which builds lifelong habits of success.</td>
</tr>
<tr>
<td>Systems, Logistics, Data Systems</td>
<td>Building and utilizing effective systems to support the operation of a rigorous academic environment.</td>
</tr>
</tbody>
</table>
Describe the expected number of days/hours for professional development throughout the school year, and explain how the school’s calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and describe how such time will typically be used.

MEF is committed to extending the learning time for teachers as well as students and considers staff training an essential component for school conversion. At least 18 days per year of training and professional development for teachers is planned.

Two weeks prior to start of school (July/Aug)

6-8 full day PD days during the school year (school year)

18 full days of professional development for teachers

2.0 hours each Wednesday for additional PD (weekly)

Additional content specific training for staff and leadership during the year

>28 total days of professional development for teachers and staff annually

### School-Year Professional Development Schedule

<table>
<thead>
<tr>
<th>Month</th>
<th>Category</th>
<th>Type</th>
<th>Total Annual Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>July/Aug</td>
<td>July Professional Development</td>
<td>training, preparation, and team building</td>
<td>10 days</td>
</tr>
<tr>
<td>Aug - May</td>
<td>Weekly Professional Development Sessions</td>
<td>responsive sessions based on evidence from observations, student data, and staff feedback spiraling July topics and skills</td>
<td>2 hours/week</td>
</tr>
<tr>
<td>August, September, February</td>
<td>Full Day Professional Development</td>
<td>deeper dives on whole day session topics and skills</td>
<td>6-8 days</td>
</tr>
</tbody>
</table>
As evidenced in the table above, School-Year Professional Development Schedule, MEF has designed a daily schedule and annual calendar to support our professional development program. The daily schedule dedicates time to co-planning amongst grade level teams in elementary school, and content and grade level teams in middle and high school. This time is utilized to discuss and problem solve student issues, analyze student work product, plan grade level and schoolwide events and meet with parents.

The 6-8 PD days per year opportunities exist to develop and empower teachers and give them voice to provide PD sessions to their colleagues while sharing best practices. This time is also dedicated to vertical alignment meetings and content specific professional development. School staff and teachers also gather during Quarterly Data Days to review internal assessments, benchmarks and other student data for trends and readjust curriculum plans for the current year and beyond.

The Wednesday PD sessions are designed specifically to combat teacher burnout by increasing support for teachers from leadership and colleagues and ensure shared understanding of school wide priorities. These sessions provide the time and space to continue to build on the information dump that occurs at the beginning of the school year - diving deeper into topics as needed. Teacher workloads vary from grade level and content area; Wednesday PD time provides another opportunity for teachers to complete tasks, review student work and collaborate with one another. This sacred PD time attracts professional instructional staff as it proves our dedication to providing coaching and development of teachers in their practice.

MEF’s dedication to growing expert teachers is reflected in the time dedicated to individual teacher growth. Instructional coaches commit to observing teachers weekly followed by an hour of feedback and debriefing. This coaching cycle exists to foster a safe environment in which our teachers feel free to take risk, try new strategies and develop their instructional skills for the best of students. In addition to the coaching program, teachers participate in formal evaluations twice a year. It is with both of these procedures that the teacher develops a Personal Growth Plan, for their own reference, as a model and exemplar to our students in setting goals and working towards growth.

**Additional information regarding professional development and training with regard to**
turnaround efforts in chronically underperforming schools and with guidance for teachers as it relates to diversity, equity, and inclusion topics.

It is important to note that our proposal includes additional summer PD days as well as weekly 2 hour sessions dedicated for staff development allows school leadership the time to set a foundation at the start of the year and then to revisit strategies, provide clarification, practice time and reinforcement throughout the year. The comprehensive planning tools ensure that the PD time is maximized, effective and aligned to the priorities and goals of the school.

School operators are expected to collaborate with respect to hiring, PD, summer teacher training and related activities. Network wide PD will include all staff from all schools in the feeder pattern and are a great opportunity for team building, mentoring, and grade level and content area alignment. Additionally, any training that can be combined across schools, such as an introduction to new Science Standards, will be coordinated. Since all school leaders will be completing the Arc of the Year, there will be many common components in which the school leaders and Directors of PD can share responsibilities and resources.

Our proposal includes hiring skilled operators with expertise and capacity in these areas and we are confident the materials in this proposal and the capacity our partners bring will provide a major improvement in the professional development and teacher training across the entire feeder pattern.

Additional Materials

In addition, we have included significant additional material below. This supplement includes significant detail as it relates to teacher preparation, professional development, and support for DEI initiatives. Included are additional resources for school leaders to use that include the following:

- Detailed summer professional development plans for elementary school
- Detailed summer professional development plans for middle and high school
- Sample 6 month monthly PD agenda
- Sample Wednesday PD plan
- Examples of PD materials for guiding teachers in looking at student work (LASW)
- Actual PD materials for a session on Equity: Special Education training for every educator
- A sample curriculum overview for k-4 guided reading

MEF’s experience in training staff in both instructional and cultural strategies for their programs (e.g. Brain Forest Summer Academy) should not be ignored and can account for MEF’s acknowledgement of the need for continued professional development as well as the awareness of the amount of time and dedication required to create and implement effective PD. Any school operated by MEF or a non-profit entity without their own school model will follow the PD plan as outlined in the application and this addendum. Some highlights of the plan include:

- Each school will have a leader focused on instructional coaching and professional development
- Existing operators will collaborate within the MEF network and offer resources as applicable.
- MEF will partner with MPS to provide mandated trainings such as child-abuse, safety and special education.
- Any contracted curriculum (e.g. Systems 44, Do the Math) will provide training directly from
the external partner.
- Extended Summer PD before school starts, weekly Wednesday PD for 2 hours, and common planning time provides ample time for establishing a foundation with teachers and then supporting their continued growth and effectiveness.

Additional tools, resources and examples of what MEF or a non-profit would use to plan for annual PD:

Achievement First’s open source toolkit provides PD planning tools and training session materials that are aligned to MEF’s curriculum, RTI protocol and the school leader’s annual planning tool (AOTY, Attachment 1). Additionally, AF’s resources provide comprehensive training in the Essentials Rubric (Attachment 2), the tool utilized to evaluate classroom effectiveness. These resources take the guesswork out of setting priorities for school success and continually guide the school leadership team to maximize time with staff and students.

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arc Of The Year</td>
<td>Provides alignment across a network of schools. Backwards and forward planning that highlights the most important priorities for school leaders, defines the wins associated with those priorities and the strategies that need to be in place to achieve success. It is a roadmap that outlines specific responsibilities across a school leadership team and provides an implementation calendar to support continued on the priorities. The AOTY is broken down into 6 week sessions that require school leadership to continually evaluate the progress of the plan and adjust as needed. Comprehensive and specific - for example, it defines 3 major priorities for the first weeks of school. This laser focus plan supports a school leader and the Director in calendaring their sessions in alignment with the AOTY. What’s most valuable requires the school leader to really define expectations of every detail before teachers arrive at school which supports effective training of staff and implementation of the plan. You have to know where you are and where you are going before you plan to get there.</td>
</tr>
<tr>
<td>Essentials Rubric</td>
<td>The Essentials of Instruction rubric clearly explains and defines great instruction. 5 key questions, coaches and evaluators can measure the quality of instruction and support teacher growth and effectiveness. This tool provides alignment of expectations across MEF schools, regardless of the school operator.</td>
</tr>
<tr>
<td>Summer PD Guidance ES</td>
<td>Planning tool that identifies and prioritizes PD sessions that should occur before school starts and those that can happen later but must still happen. Requires School Leadership and Director of Professional Development to have completed AOTY (attachment 1) and created a Common Picture for how school will look before trying to train teachers. Provides time for routine and lesson rehearsal among teachers and leaders to practice before the first day of school. The document will have to be updated to match MEF’s school calendar and Alabama mandated training.</td>
</tr>
<tr>
<td><strong>MS/HS</strong></td>
<td>will complete this document with the ES School Leader and Director of Professional Development.</td>
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</tr>
<tr>
<td><strong>Sample Monthly PD Agenda</strong></td>
<td>Example of the deliverable from the Director of Professional Development that aligns with the school leader’s AOTY Week 1-6. Outlines due dates as well as expected materials so that the school leader and Dir. of PD can review session materials created by additional staff, such as, a tenured teacher conducting a session on TLAC strategy “Strong Voice.”</td>
</tr>
<tr>
<td><strong>Wednesday PD Plan</strong></td>
<td>This resource provides a roadmap for school leadership in utilizing the Wednesday PD sessions. Most importantly, the guide identifies the most effective ways to use this time and provides recommendations for which protocols teachers should complete during this time. Specific directions are provided to support the school leadership team building out the Wednesday PD schedule for the whole year complete with reminders to include a Culture Stepback on Weeks 3 and 6 - all aligned to the Arc Of The Year plan. Examples of other days include:</td>
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<tr>
<td></td>
<td>• Data Day</td>
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<td></td>
<td>• Diversity and Inclusiveness</td>
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<tr>
<td></td>
<td>• Unit Unpacking Protocol</td>
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<tr>
<td></td>
<td>• Looking at student work</td>
</tr>
<tr>
<td></td>
<td>• Practice lesson sessions</td>
</tr>
<tr>
<td><strong>Example Protocol LASW</strong></td>
<td>This Looking At Student Work (LASW) protocol provides an example of the supplemental resources provided to MEF school leaders when they are developing their PD sessions. The protocol guides the school leader in choosing courses in which the protocol will be most effective - preventing the school leader from falling into the trap of ‘everyone should do it’ and requiring the school leader to be thoughtful in defining action steps for the school.</td>
</tr>
<tr>
<td><strong>PD Session: Delivering on Equity</strong></td>
<td>Session PPT on Delivering Equity</td>
</tr>
<tr>
<td></td>
<td>Session Plan for PD on Delivering Equity provides an example for the expectation of PD session plans.</td>
</tr>
<tr>
<td><strong>ELA/Math Curriculum</strong></td>
<td>This overview provides a glance at Achievement First Elementary ELA Program Overviews. While teachers will be trained on curriculum implementation at the start of the year, support and resources will continue throughout the Wednesday PD days, Content Meetings and through the coaching cycle. This specific page demonstrates the robust and clear resource provided throughout the AF curriculum that drives meaningful teacher intellectual prep and results in effective lessons. Additional examples are provided in Attachment 1 of the original application. MEF chose this curriculum specifically to support staff as they begin to master new strategies and improve the curriculum.</td>
</tr>
</tbody>
</table>
8. Performance Management

Mission specific educational goals and targets in this proposal are aligned with the objectives of the Montgomery Public Schools Intervention Plan.

This proposal begins with elementary grades and will focus on leading indicators, such as attendance and interim assessments then move to annual growth, and proficiency. Goals are phased over a 5 year timeline based on the beginning of the conversion process for a particular school and to match the anticipated renewal timeline.

As this proposal is for a set of conversion schools it is understood that the starting point for performance is going to be extremely low. However, in keeping with our focus on high expectations and the aggressive goals outlined in the State Intervention Plan those schoolwide goals are included here.

Middle and Elementary Schools

<table>
<thead>
<tr>
<th>Measure</th>
<th>Year 1</th>
<th>Year 3</th>
<th>Year 5</th>
</tr>
</thead>
</table>
Proficiency Rates

<table>
<thead>
<tr>
<th></th>
<th>5 percentage point annual increase from prior year</th>
<th>10 -15 percentage point increase over three years</th>
<th>20-25 percentage point increase over five years</th>
</tr>
</thead>
</table>

Student Growth

<table>
<thead>
<tr>
<th></th>
<th>Schoolwide growth scores of 70 on the ALSDE growth scale</th>
<th>Schoolwide growth scores of 75 on the ALSDE growth scale</th>
<th>Schoolwide growth scores of the ALSDE growth scale</th>
</tr>
</thead>
</table>

Chronic Absenteeism

<table>
<thead>
<tr>
<th></th>
<th>3% point reduction in chronic absenteeism per year.</th>
<th>5-10% point reduction in chronic absenteeism over 3 years, or overall rate that is at or better than district average.</th>
<th>10-15% point reduction in chronic absenteeism over 5 years, or overall rate that is at or better than district average.</th>
</tr>
</thead>
</table>

Given the inheritance effect that comes with a conversion schools strategy, accountability measures must be considered in two additional ways:

1. Performance relative to similar schools in Montgomery and across Alabama. It is possible that significant gains can occur in either growth or achievement yet these goals above may not be met. In such a case it is important to evaluate relative performance over the three and five-year timeframes in comparison to other bottom 6% schools in Alabama and other intervention schools in the district. MEF will prepare a relative analysis each year as additional context and for future evaluative consideration as it relates to school performance. At a minimum, MEF conversion schools should outperform this comparison group over the three and five year timeframes.

2. Performance for students enrolled prior to conversion and performance for students who have only been enrolled during the period under management of the conversion operator. MEF recognizes the importance of managing data for these two distinct groups of students – for both innovation purposes and for appropriately assessing impact of the conversion strategy. In the early years of the conversion a majority of students will have been taught under the pre-conversion environment and those students performance data may skew the younger students’ data. It is not appropriate to hold MEF accountable for results of students it had little instructional or schoolwide influence upon, and therefore we will maintain clear performance measures and careful analysis of all students that have had at least three years of school under the conversion environment. Tracking and analyzing both sets of data is essential to truly understanding the impact of the conversion strategy.

Upon approval, we will include language in the charter contract that ensures that the performance evaluation addressing these factors is part of the accountability plan. MEF is fully accepting of accountability for all students that have had 3 or more years of school under the conversion structure.

MEF Conversion Schools has selected several key internal and external measures to assess progress toward mission specific organizational goals. While these goals are not expected to be part of the authorizer’s evaluation of the effectiveness of the school we do believe they are key indicators of progress toward building a school and organization capable of delivering on our overall mission.
Building a financial surplus over a 5 year period that is equivalent to 60 days cash on hand.
Managing a break even or better budget each year.
Meeting at least 95% of enrollment goals
Net student accretion or attrition. To be monitored and baselines set.
Hiring 95% of staff positions prior to the start of school each year.
Student surveys: at least 75% of students indicate a positive school environment.
Teacher surveys: at least 75% of teachers indicate the school is a good place to work.
Parent surveys: at least 75% of parents indicate they would recommend this school to a neighbor.

In addition to all applicable mandatory state assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school's curriculum, performance goals, and applicable state standards.

Effective interim assessments are essential for ensuring progress toward the aggressive goals in this proposal. A key interim measure for MEF Conversion Schools is NWEA/MAP, a nationally normed assessment that allows for comparison to students across the country. Our students will be competing with students across the country (and the world) for jobs and college admission and we must have both formative measures of their progress and comparative measures against students in other states. MAP provides this, is Common Core aligned and has a large installed base. Other assessments will include STAR for early assessment, DIBELS, WIDA for EL students, and school-produced interim assessments and unit assessments. MEF has a relationship with ANet and will likely utilize ANet interim assessments until such time as the school has the capacity to prepare its own. Our commitment to professional development and data driven instruction requires formative and interim tools and we plan to utilize them as appropriate in all grades.

Explain how the school will measure and evaluate academic progress of individual students, student cohorts, and the school as a whole throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.

MEF believes the purpose of assessment is to gain insight into student understanding. Effective assessment should make student thinking visible and require teacher and student response and action. A key to quality assessment is that students are users of their own assessment data. Therefore, we ensure students understand the purpose of every assessment they take. Teachers and school leadership will regularly communicate purpose and results to students so students can maintain an active role in their own progress.

Another aspect of quality assessment is analysis and use of data to improve instruction. We believe that an assessment should only be administered if the data will be useful in improving instruction for students. Therefore, every assessment we administer has a data analysis and action component. We have multiple options in our assessment strategy and PD plans to measure and evaluate data in formative and summative ways. The school will collect daily and weekly attendance and discipline data, exit ticket data from individual classrooms, unit assessment data, interim assessment data including MAP 3 times per year, and of course annual summative data. MEF plans to utilize the AdvancED's framework for research based quality factors as a normal practice and to prepare for eventual accreditation from AdvancED once the school has sufficient years of operation.

The Principal and selected leadership team along with key instructional leaders will lead the collection and analysis of assessment data efforts. The team will be responsible for communicating data collection procedures, compiling, updating, and disseminating data an analysis of data with the school community.

MEF will adopt AdvancED’s seven research-based school/system quality factors that are key to driving improvement to demonstrate quality assurance through internal and external review.
**Clear Direction**- MEF Conversion Schools will seek to have the capacity to agree upon, define and clearly communicate to stakeholders the direction, mission and goals that the school is committed to achieving.

**Healthy Culture**- MEF will create shared values, beliefs, written and unwritten rules, assumptions, and behavior of stakeholders within the school community that shape the school's social norms and create opportunities for everyone to be successful.

**High Expectations**- MEF will show commitment and demonstrated actions in support of high expectations for all stakeholders, including excellent student learning outcomes and success, high levels of teacher quality and support, leadership effectiveness, proactive community engagement, and valuable parent involvement.

**Impact of Instruction**- MEF will strive to show the capacity of every teacher to purposefully and intentionally create an environment that empowers all students to be successful in their learning and reach expected levels of achievement, including readiness to transition to the next level of learning or career pathway.

**Resource Management**- MEF will demonstrate the ability of the school to plan, secure and allocate its resources (human, material, and fiscal) to meet the needs of every learner.

**Efficacy of Engagement**- MEF will show the capacity to engage learners and other stakeholders in an effective manner to improve learning outcomes.

**Implementation Capacity**- MEF will have the ability to execute, with consistency, actions designed to improve organizational and instructional effectiveness.

MEF Conversion Schools will also adopt *AdvancED's Standards for Quality Schools*. These five standards are:

**Standard 1: Purpose and Direction**- MEF will maintain and communicate a purpose and direction that commit to high expectations for learning as well as shared values and beliefs about teaching and learning.

**Standard 2: Governance and Leadership**- MEF will operate under governance and leadership that promotes and supports student performance and school effectiveness.

**Standard 3: Teaching and Assessing for Learning**- MEF curriculum, instructional design, and assessment practices will guide and ensure teacher effectiveness and student learning.

**Standard 4: Resources and Support Systems**- MEF will have resources and provides services that support its purpose and direction to ensure success for all students.

**Standard 5: Using Results for Continuous Improvement**- MEF will implement a comprehensive assessment system that generates a range of data about student learning and school effectiveness and will use the results to guide continuous improvement.

Identify who will be responsible for managing the data, interpreting it for classroom educators, and leading or coordinating professional development to improve student achievement.

The Principal, with support from the leadership team and grade level and content chairs is responsible for managing and interpreting data for classroom educators, and the director of professional development is responsible for coordinating professional development to improve student outcomes. The director of operations maintains the formative and summative data in support of
the principal and teaching staff and ensures the proper testing tools (online, physical, otherwise) are supplied. The conversion partnership with the local LEA provides opportunities for training at district sessions, and the MAP contract will provide deep dive training for the founding team during year one, and at additional cost, if necessary, in future years.

The principal and director of operations will have the expertise to support training staff on interpreting data analytics, while the director of professional development will support guiding teachers in making changes in instruction in response to the data driven instruction.

Explain the training and support that school leadership and educators will receive in analyzing, interpreting, and using performance data to improve student learning.

Teachers will have multiple opportunities throughout the year to train and learn how to better utilize and interpret performance data to improve student learning. Two weeks of teacher training before school each year is a key element of the PD calendar, and the school year training schedule calls for 6-8 full training days during the year. At least three of the PD days during the year will be dedicated data days where teachers will, under supervision of the principal and director of professional development, utilize real data from their students for both training and for making decisions on re-teaching and other intervention strategies to improve student learning. The coaching structure led by the director of professional development allows for weekly learning opportunities during early release day, coaching meetings, and grade and content level team meetings. Additionally, regular dashboard reporting from the senior leadership team to the whole school staff (leading indicators like attendance, discipline, etc.) provide weekly opportunities to learn and develop one’s practice as it relates to data driven instruction and other schoolwide performance indicators.

Describe the corrective actions the school will take if it falls short of student academic achievement expectations or goals at the schoolwide, classroom, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing them.

MEF has described a robust accountability approach in this application and it would allow for early identification of a performance concern. If an MEF school were to fall below anticipated academic achievement expectations, school leaders would have already been working closely with the staff to identify improvement tactics, and in a regularly scheduled interaction with the board would communicate what steps would be taken to address the gaps. The board would bring additional support in the form of advisory support, potential consulting support, and additional assistance from partners (higher ed., for example). Such support may include development of a support plan to help the principal meet expectations. If additional funds are necessary to provide instructional or other resources the board may undertake a fundraising effort or work with the LEA to secure available support from existing capacity. After an appropriate time and with inclusion of additional resources, if the principal is unable to meet these expectations, he/she may be removed from the position. In the same way, the principal will hold his or her leadership team and teachers accountable to these goals. If it is determined that other staff are not meeting expectations after they are put on specific plans of support, they, too, may be dismissed from their positions.

In the event instructional changes are necessary, the principal, assistant principal and director of professional development will plan and execute the changes after first gaining support from the board and assistance from technical advisors. Corrective actions are the responsibility of the principal who is accountable for school performance. The board's role is to hold school leadership accountable for such results and to commit appropriate resources to deliver the results.

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Section Evaluation

<table>
<thead>
<tr>
<th>Facilities</th>
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<tbody>
<tr>
<td>Required facilities include the entire premises (indoor, outdoor, parking, playgrounds, athletic spaces, etc., of each of the proposed schools. Similar enrollment is anticipated and in the event of dramatic changes in enrollment MEF will work with the state intervention authorizer to best utilize space as needed and as most effective for the intervention. It is expected some degree of renovations or improvements may be necessary and those will be identified in partnership with the authorizer upon approval.</td>
</tr>
</tbody>
</table>

List anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include, but are not limited to, the following:

<table>
<thead>
<tr>
<th>Type of Anticipated Specialty Classrooms</th>
<th>Number</th>
<th>Number of Students to be Accommodated One Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Science lab</td>
<td>1 – 2 per middle school</td>
<td>At least 24-28 students, but able to flex as may require</td>
</tr>
<tr>
<td>b. Art room (with or without kiln)</td>
<td>One per elementary and middle school.</td>
<td>At least 24-28 students, but able to flex as may require.</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>c. Computer lab</td>
<td>At least two per school, if available</td>
<td>At least 24-28 students, but able to flex as may require.</td>
</tr>
<tr>
<td>d. Library/media center</td>
<td>One per school if available</td>
<td>At least 24-28 students, but able to flex as may require.</td>
</tr>
<tr>
<td>e. Performance/dance room</td>
<td>One per school if available</td>
<td>At least 24-28 students, but able to flex as may require.</td>
</tr>
<tr>
<td>f. Auditorium</td>
<td>One per school if available</td>
<td>Able to host up to half the school, or more.</td>
</tr>
<tr>
<td>g. Other (please list)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. List anticipated administrative/support space needs, including the anticipated number of the following:
   
   a. Main office - 1
   b. Satellite office
   c. Work room,copy room - 1
   d. Supplies/storage - multiple
   e. Teacher work room -1-2
   f. Other

   It is anticipated that the existing school facilities will be adequate for administrative support and in the event any deficiencies are noted we will work with the authorizer to find appropriate accommodations and/or make improvements to the facilities.

List which, if any, of the following are essential to fulfillment of the school’s athletic program:

   It is anticipated that the existing school facilities will be adequate for athletic programming, and in the event any deficiencies are noted we will work with the authorizer to find appropriate accommodations and/or make improvements to the facilities. The elementary and middle schools included in this proposal will have lesser needs for athletic facilities than the high school.
<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>a. Gymnasium</td>
<td>X</td>
</tr>
<tr>
<td>b. Locker rooms</td>
<td>X</td>
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<tr>
<td>c. Weight rooms</td>
<td></td>
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<tr>
<td>d. Field(s) (football, soccer, multi-purpose)</td>
<td>X</td>
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<tr>
<td>e. Baseball/softball field</td>
<td></td>
</tr>
<tr>
<td>f. Other (please list)</td>
<td>X</td>
</tr>
</tbody>
</table>

Proper storage facilities for additional sports equipment, supplies, and training materials.

1. Identify any other significant facilities needs not already specified, including:

### Playgrounds

a. Playgrounds and outdoor space are essential to all grades.

### Large common space for assemblies and other large-group meetings.

a. Space to convene the entire school or entire grade levels are also necessary as well as large venues for community meeting gyms, cafeterias, etc.)

### Other special considerations (identify and explain)

- a. In the event there are any handicapped accessibility deficiencies in the buildings or on the property we expect the authorizer
- b. Properly functioning HVAC systems in all building areas.
- c. Repair and maintenance of any identified deficiencies in building codes
- d. Adequate food service spaces, storage, refrigeration and freezers, service lines, and cooking and serving equipment.
- e. High speed wireless internet connectivity in all building areas.
Does the applicant have specific desired location(s) different from those being made available by the authorizer?  
Yes  No  
X

If Yes, and the applicant has a specific facility under consideration, identify by current school name and/or neighborhood (you may add rows to the table as needed).

<table>
<thead>
<tr>
<th>Desired Location</th>
<th>As explained throughout this proposal, MEF anticipates a partnership with the district to implement a cr strategy within the Lanier feeder pattern that includes the following schools</th>
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<tbody>
<tr>
<td></td>
<td>Davis, and Nixon Elementary Schools</td>
</tr>
<tr>
<td></td>
<td>Bellingrath Middle School</td>
</tr>
</tbody>
</table>

Is the applicant willing to share a facility with another school?  Yes  No  
X

If so, identify by school name and/or neighborhood (you may add rows to the table as needed)

| Desired School Name and/or Neighborhood | It is not anticipated that a need to share space with another is necessary, but we are willing to cons id partner in the effort to transform outcomes for students in public schools. |

Please identify funding sources to be used for facility upgrades and/or new construction.

| Funding Source(s) for Facility Upgrades and/or New Construction | As a conversion school, the authorizer is expected to provide for all current and future facilities neec upgrades, including annual repair and maintenance, renovations, and/or new construction as may b |

Discuss contingency plans in the event you do not receive a facility from the authorizer.

As a conversion charter school, this application is contingent upon access to current facilities.

Attachments
Section 9: Facilities

– No Attachments –

10. Start-Up and Ongoing Operations

Section Evaluation

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<thead>
<tr>
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<td>Meets or Exceeds the Standard</td>
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</tbody>
</table>

Start Up and Ongoing Operations

Attachment 24 - Detailed start up plan

Attachment 25 - Insurance Coverage - Additional and/or increased coverage will be added as required

Safety and security of students, staff, facility and property are a priority for Montgomery Conversion Schools. In accordance with Alabama law [AL Code § 16-1- 44 (2013)]. MEF will adopt a comprehensive school safety and security plan that includes health, safety and security, risk management policies and procedures, necessary security personnel, and the associated technology and equipment needed to implement this plan effectively. As a conversion school this safety and security plan is expected to mirror the plans already in place for all schools in the LEA. MEF will ensure continuation of this plan and as well as other necessary safety and security measures such as background checks, medical policies and procedures, emergency preparedness plans, lockdown and lockout procedures, and ongoing facility safety and security procedures.

School security officers (police) to the extent they are already provided and funded will be maintained and supported and included in staff and teacher training as necessary. Similarly, cameras and other security measures already in place in the schools will continue to be utilized in partnership with the LEA.

The director of operations will be the responsible party and primary point of contact with the LEA for security related matters, including arranging and documenting fire, tornado, and other emergency preparedness drills as required by state law and LEA policy.

Transportation Plan

Partnership Design
A conversion school, by design, is a partnership between a charter operator and the local LEA to provide an innovative model of school improvement that ensures no disruption in enrollment and allows the same provision of public transportation resources to a community while enabling operator autonomy with respect to academics, curriculum, school culture, staffing, leadership, etc.

MEF Conversion Schools are open enrollment charter schools that guarantee zoned students enrollment priority and are operated in partnership with the district to ensure full access. In the simplest terms, nothing changes with respect to transportation, and students and families retain access to their neighborhood school.

This proposal ensures the district manages, maintains and ensure transportation to all students according to normal district practices, including special transportation that certain students may require as outlined in IEPs or 504 plans, field trips, college visits, athletic events, etc. These services are provided at no cost to the charter school and the district retains all specifically identified transportation funding and local tax dollars that may go toward such costs. The district will accommodate the start and end times of the charter school as part of its educational model. The charter school will work collaboratively with the district to support arrival, dismissal, athletic and other forms of transportation that may be required and will notify the district in advance of any requested changes in transportation from the prior year.

The district agrees to support the school’s transportation needs and not to change or reduce service without prior involvement and consent of the school leadership. Ultimate responsibility for the safe, timely, and reliable transportation remains with the local school district and the district ensures all buses are properly inspected, stickered, and documented at all times.

Schools receiving transportation services under this proposal include:

- Nixon Elementary
- Davis Elementary
- Bellingrath Middle

Attachments
Section 10: Start-Up and Ongoing Operations

– No Attachments –

Notes

**Kristy Hatch, 9/23/19 6:52 PM:**

Please add the timeline for hiring teachers (found in attachment 24)

**Ann Sikes, 9/23/19 8:55 PM:**

Teachers will be hired at various times during the 6 months prior to the start of school and/or professional development training. While not common, in some cases we expect to hire teachers even earlier than that, though paid employment will not begin until school begins.

**Kristy Hatch, 9/23/19 6:52 PM:**

Please remove Floyd Elementary from the transportation list.

**Ann Sikes, 9/24/19 3:57 AM:**
11. Operations Capacity

MEF Conversion Schools’ strategy to utilize selected providers to manage each school also ensures significant operational capacity exists to support the school. Please refer to the Letters of Intent Attachment provided by Faulkner University and Democracy Prep as evidence of the capacity of our partners. Faulkner University is well known for their beautiful campus in Montgomery, numerous graduate and undergraduate programs and extensive expertise in operations, risk management, professional development, HR, marketing, and facilities management, etc. Democracy Prep, a large national CMO brings a similar strength of support to operations and is well known for their effective centralized management of over 20 schools across the country. Democracy Prep schools have a combined budget in excess of $100 million dollars and they are highly experienced school operators.

In addition, Montgomery Education Foundation has a diverse and experienced board and Interim Advisory Committee with significant capacity and qualifications to ensure effective operations of the schools. The capacity of this team is a great advantage to the schools and MEF is pleased to bring its individual and collective skills to support the operations plan. The senior leaders of the board and president of the foundation will provide direct support and technical assistance to the leadership team of the school to ensure effective implementation of key operations functions: staffing, professional development, performance management, general operations, and facilities management.

Specific expertise is provided by the following individuals.

Ann Sikes, President of MEF and a skilled nonprofit leader with a proven track record of delivering MEF programs and services to the community for many years. She has extensive experience, hiring, supporting, and coaching staff to meet aggressive goals and in building highly effective, diverse teams.

Paul Hankins, Air Force General (Retired), brings performance management, operational and leadership capacity of the highest level. As board chair of MEF his role and influence is significant and his involvement will be an asset to the leadership team.

Trey Sippial, Sippial Enterprises, is a commercial real estate broker and entrepreneur with startup experience in running franchise operations and managing business operations for a commercial real estate management firm. His experience in these are directly related to the operational challenges faced in school startup – namely, facilities preparation, staff hiring, general operations, and financial planning.
Chris Reynolds, advisor to MEF, has supported the startup and operations of multiple charter schools in several states. He is a skilled finance and operations expert and was part of the collaborative team that planned, executed, and operated the first conversion school in Tennessee in partnership with the local LEA.

Describe the organization’s capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

The MEF board and Interim Advisory Committee has extremely skilled finance, facilities and real estate development experience and the finance committee of the board will provide advisory support to the school on operations, facilities, finance, security and other matters. In addition, board member Dave Borden is a CPA and former Montgomery County School Board member and will ensure expert technical advice and collaborative communication for any facilities related needs.

The school does not plan to acquire, build out, or renovate facilities. As a conversion school all facilities responsibilities are the local LEA’s. MEF will work collaboratively with the local LEA to ensure any facilities needs are actively communicated to the district and will support needed improvements as may be necessary. The director of operations will be the responsible party and primary point of contact with the LEA for facilities related matters, including scheduling repairs, communicating needs, and providing access, documentation, etc., as necessary.

**Attachments**

**Section 11: Operations Capacity**

– No Attachments –
1. Financial Plan

**Section Evaluation**

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**FINANCIAL PLAN AND CAPACITY**

1. **Financial Plan**

   Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.

**Financial Planning and Accounting**

MEF will ensure annual financial planning and accounting procedures in place for each school. This process includes annual financial reporting, budgeting, and quarterly reviews of standard financial reports. Responsibility for producing annual budgets, monthly financial statements, and related information lies with the management company running the school and will be detailed in the management contract.

Each school is expected to have a Dir. of Operations or similar role that works with outsource providers or the home office of the management company to ensure strong financial controls and reporting.

This role, in collaboration with the Principal will create an annual budget, financial forecasts, and related analyses to support the accounting and finance function of the school. Key systems will be outsourced to providers (payroll, benefits, for ex.) and the existing MEF financial policies and procedures provides a strong foundation for purchasing, payables, and the system of internal control during startup and in future years, if necessary. MEF is audited each year by an independent CPA firm and received unqualified opinion on its latest audit (clean opinion). Supporting this function and providing guidance and preliminary reviews will be the board of director's finance committee, led by Dave Borden, CPA. The finance committee is not a decision-making body and its role is to provide advice and consultation to the schools and their leadership regarding all financial and operational matters. All financial related approvals, such as the annual budget, executive compensation, vendor contracts (audit firm, for ex.), etc., are approved at regularly scheduled board meetings.

The design as a conversion school managed under a contract with a selected provider ensures capacity is available from both MEF and the operator itself. The board's financial experience will provide training and support to the leadership team, namely the director of operations as it relates to finance and operations matters. The partnership with the local LEA removes significant responsibility from the school for food service, transportation, and facilities related elements of the school allowing the director of operations to focus on strategic matters and direct support of the staff and their instructional resource needs. As a conversion school operating in partnership with the local LEA, this design ensures a streamlined function for traditional district services and existing systems to ensure federal funds are received and accounted for timely and accurately.
Purchasing

The Director of Operations or similar role approves all purchase orders within the approved budget and all payments/disbursements above an established amount will require two signatures. A complete monthly report of these expenditures shall be made available to the finance committee and Board of Directors as directed. Any purchase or contract above the statutory limit for a charter school will require board approval. The Board of Directors will be responsible for compliance with all applicable state and federal competitive bid laws to the extent they are applicable. These responsibilities will be pushed down to the operator.

Payroll

The Director of Operations or similar role will prepare and approve payroll data and the outsource payroll and benefits provider ensures timely and accurate payment of wages, taxes, and quarterly and annual filings. All salary adjustments are approved by the principal and director of operations and all salary adjustments of the principal’s direct reports (leadership team) are ratified by the board of directors.

Financial Reporting

The Director of Operations or similar role will provide regular financial reports to the Board of Directors, including budget comparisons, statement of income and expenditures, balance sheet, ongoing financial forecasts and other related information. Reports will be reviewed monthly or as needed by the Finance Committee and the Board of Directors. The review of financial reports should be related to the annual goals and strategic objectives as approved by the board of directors. All financial statements will be available to the public through the school’s website.

Audit

Each year the board shall approve an audit by an independent accounting firm and provide it to the public, the LEA, and the state of Alabama. This audit will be posted on the school’s website along with the annual form 990 report.

Financial Policies

Upon approval, a thorough review of existing policies will be conducted to determine what changes may be necessary to ensure compliance with the Alabama code and to ensure effective procedures are implemented for vendor approval, purchasing, payables, cash management, bank authorizations, and other financial management systems.

Describe the roles and responsibilities of the school’s administration and governing board for the school finances and distinguish between each party.

This board holds the charter and is expected to approve a budget annually by a set date. The director of operations and principal shall have responsibility for preparing and adhering to an annual budget as approved by the board of directors. Further, the director of operations supported by the administrative staff, shall be responsible for implementing internal controls as described in the financial policies manual and ensuring accurate and timeline reporting compliance for authorizer, state, and federal required reports.
The board’s role is to be ultimately responsible for the financial administration of the school and the director of operations and principal are responsible for implementing the financial function timely and accurately and with appropriate transparency as required of a public school.

A key function of the board is to approve an annual budget and hire an independent audit firm. Procedurally, the Dir. of Operations and Principal shall present a recommended annual budget to the MEF board of directors at a regularly scheduled meeting. The board will adopt this budget, or a revised version, as the board may require, and the principal shall be ultimately responsible for implementation. The board, with support from the finance committee will select an auditor.

Describe the school’s plans and procedures for conducting an annual audit of the financial and administrative operations of the school.

Each year MEF conducts an annual financial audit and the financial results of MEF Conversion Schools will be included in the audit. Those results will be detailed in separate supporting statements to ensure separation of revenues and expenses from existing MEF programs. Additionally, it is expected a standalone audit of MEF Conversion Schools financial results will be required and MEF has built those costs into the budget included as part of this proposal. In accordance with industry practices the director of operations or board treasurer will sign an engagement letter upon board approval of an independent audit firm and completed audit results will be communicated directly to the board.

Describe how the school will ensure financial transparency to the authorizer and the public, including its plans for public adoption of its budget and public dissemination of its annual audit, annual financial report, monthly check register, and monthly financial reports.

To ensure community support, meet authorizer requirements, and to attract high quality staff the school must be trusted to share information openly and transparently. MEF, through its long history of service and partnership with the district and throughout Montgomery County is ideally suited to ensure this continues at MEF Conversion Schools.

Each year, MEF Conversion Schools will adopt annual budgets in an open public meeting. Copies of the approved budget and prior year audited financial statements and Form 990s will be made freely available online.

In accordance with open meetings laws in Alabama, all meetings of the board of each nonprofit LLC will be open to the public and appropriate notices published on the website.

Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.

MEF Conversion Schools anticipates contracting with providers for various services including but not limited to accounting, payroll, insurance, legal, and audit services. These services may be secured locally or they may be secured via existing relationships or internally through the selection management company hired to manage the school. Recurring services currently being provided to the schools in this proposal by the LEA are expected to continue and if approved will be outlined in an MOU or included in the charter contract itself. Such services include transportation, food service, facilities and related maintenance, nursing, security, etc. MEF charter schools budget does not include any such funds and revenues for such expenses are planned to remain solely with the LEA not the charter school. In the event the charter school chooses to provide such services itself the appropriate pro-rata funding for such services will negotiated with the LEA.

Anticipated costs have been budgeted as follows.

Accounting and Audit $10,000 – 20,000
Insurance $15,000 – 30,000
Legal $5,000 – 10,000
Payroll $60 – 100 per employee per year

Criteria for selecting such services will be determined by the director of operations and ultimate selections will be approved by the board of directors in accordance with financial policies and procedures of the school operator. Selection of providers will be based on the quality and merits of the proposal or quote, past experience, estimated cost, and other factors. The board is under no obligation to select the low bidder.

Describe the school’s plans for obtaining liability insurance to indemnify the school, its board, staff, and educators against tort claims.

As an existing 501 c 3 entity, MEF already has directors and officer’s insurance, general liability, workman’s compensation and employment practices liability insurance. This insurance will be extended to the schools and will be modified to include the required charter school minimums. In addition, an umbrella policy increasing liability levels will also be part of the insurance package. Specifics of the coverage that is anticipated are included in Attachment 25.

1. **Budget Narrative**: As an attachment (Attachment 26), present a detailed description of assumptions and revenue and expense estimates, including, but not limited to, the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
   a. Per-Student State Revenue. Use the figures below in developing your budget assumptions.
2. Anticipated Funding Sources. Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated and include evidence of commitment for any funds on which the school’s operation depends.
3. Discuss the school’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
4. Year 1 cash flow contingency in the event that revenue projections are not met in advance of opening.
5. Start-up and five-year budgets with clearly stated assumptions.

See Attachment 26 for budget narrative.

### Attachments

**Section 1: Financial Plan**

- No Attachments –
Notes

**Kristy Hatch, 9/23/19 7:05 PM:**
Please clarify the sources of the amounts found on the attachment. I.E. local revenues, IDEA, etc, where monies would be held at the district level. Please identify what CSP funding source will be. Please identify the expenses in the identified area titled Supplemental Intervention and Trauma Support and how the amount was determined. Please discuss where the referenced Pre-K revenue can be found in the expenditures.

**Ann Sikes, 9/23/19 9:14 PM:**
Local revenues are budgeted at a conservative level and evidence only the minimum amounts allowed under Alabama law - the 10 mil match. Other local funds may indeed flow to the school, but they were not budgeted for in this proposal as a conservative approach. Local transportation funds, for example, are not in the revenue model and flow to the district in order for the district to provide the same transportation services as in past years. IDEA, and Title I, II, etc are based on district averages per student, not on the actual amounts provided to each school in past years which are typically much higher than the district average amount per student given the demographics of these schools. Again, this is conservative as the school will likely receive funds beyond what has been budgeted. CSP funds refer to the U.S. Department of Education's Charter School Program (details can be found here: https://www2.ed.gov/programs/charter/index.html). Expenses for supplemental intervention and trauma support are expected to include consulting fees, technical assistance, professional dev., additional clinical support, and additional trauma informed staff that the school will likely require in the first few years of the conversion. Pre K revenue is budgeted at the funding levels for all Pre K programs in Alabama. The source is the Alabama Dept. of Early Childhood Education (https://children.alabama.gov/firstclass/prekgrants/).

2. Financial Management Capacity

**Section Evaluation**

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<tr>
<td>1. Financial Management Capacity</td>
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MEF, as an existing nonprofit organization has strong financial management practices, a skilled executive team, and an experienced board of directors. MEF’s history of successful fundraising, clean audits, and existing system of internal controls are a strength that will benefit the school and the chosen operators’ financial and operational functions. In addition, MEF has secured support from Poplar Advisors LLC, a consulting firm led by Chris Reynolds, a skilled charter school leader and experienced charter school executive who provides advisory services to MEF and will be a source of ongoing support for school financial matters.

Providing direct capacity in financial management, fundraising, and accounting and internal controls are the organizations who MEF will contract with to manage each school and their respective financial functions. By hiring education providers with significant capacity MEF is able to ensure deep expertise and broad experience in key financial areas.

For example, Faulkner University has the capacity to provide complete back office support including general ledger, financial statement preparation, budgeting, payroll, internal control, and A/R, A/P functions necessary in a school.

**Attachments**
Section 2: Financial Management Capacity

– No Attachments –
## ATTACHMENTS

### 1. Requested Attachments

#### Section Evaluation

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#### Attachments

**Section 1: Requested Attachments**

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# Recommendation

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<tr>
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<td>Ann Sikes</td>
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<td>Kristy Hatch</td>
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Approval of this application is recommended.