

Annual Authorizer Formal Site Visit Compliance Rubric

School Name: Bluffview Montessori

Visitation Date: 10/6/23

Report Prepared By: Stephanie Olsen, Henry Schantzen

One of the most important ways VOA-MN gathers information about the schools it authorizes is through on-site visits. Site visits allow the authorizer to observe the school, hear directly from key stakeholders, and corroborate school-reported information and data. VOA-MN conducts two different types of site visits: Formal and Informal. School site visits help inform the extent to which the school is meeting the charter school contract provisions contained in the body of the contract as well as contract Addendum B.

Formal Site Visits are typically conducted once per year by a member of the VOA-MN Authorizing Program Leadership Team who interviews key stakeholders and conducts observations. Written feedback is provided to the Board of Directors and school leadership using the Formal Site Visit rubric. The Formal Site Visit rubric follows the same standard scale as the School Accountability and Authorizer Oversight System:

- Meets Standard
- Partially Meets Standard
- Does Not Meet Standard

SCHOOL TOUR – OBSERVATIONS	YES	NO
Observations indicate that classrooms are clean and conducive to learning. (Contract Article 8 and Addendum B).		
Observations indicate that shared spaces like hallways, gym, cafeteria, and bathrooms, are clean and safe (contract Article 8).		

M/O Standard 1: Mission and vision are central to the school's identity and inform all decision-making processes. The school's learning program exemplifies the mission and vision of the school.		
	2: Meets	Mission and vision are central to the school's identity and inform all decision-making processes. The school's learning program exemplifies the mission and vision of the school.
	1: Partially Meets	Mission and vision are displayed in the facility, on website and in annual report, but evidence that they guide decision-making and programming are missing.
	0: Does Not Meet	Mission and vision are not used to guide school's decision-making.
Data / Source: Website, Board Packets, Annual Report, Site Visits, Authorizer-School Discussion		
ANALYSIS - SCHOOL MISSION: Bluffview Montessori School empowers self-directed learning through a materials-based Montessori curriculum that encourages independence and natural curiosity. Bluffview cultivates learners' deep respect for self, community, and a peaceful environment, while nourishing the intrinsic desire for academic, civic, and personal fulfillment.		

SCHOOL VISION: Empowered learners unfolding their full potential as whole and unique persons in a global community.

DESCRIPTION OF HOW SCHOOL IS MEETING MISSION AND VISION:

M/O Standard 2 - The school has a plan for Service Learning that connects classroom learning with real life lessons that come through service.

2: Meets - The school has a plan for Service Learning that connects classroom learning with real life lessons that come through service.

1: Partially Meets - The school has a service-learning plan, but without evidence of a connection between the plan and service activities.

0: Does Not Meet - The school does not have a plan for service learning. School does not engage in service.

Data Source: Annual school site visits, annual submission calendar, document review, discussions with school leadership

ANALYSIS -

BRIEF DESCRIPTION OF SCHOOLS SERVICE-LEARNING PLAN:

M/O Standard 3 - The school maintains a safe and healthy environment per state and federal guides and board policy. (e.g., facility /ADA, building inspections, school liability insurance, student medical / health matters, school drills).

2: Meets - The school can provide evidence that it complies with health and safety requirements for public schools.

1: Partially Meets - The school is making progress approaching standard.

0: Does Not Meet - The school could not provide evidence of compliance with health and safety requirements for public schools.

Data Source: Annual school site visits, annual submission calendar, document review, discussions with school leadership

ANALYSIS –

Faculty have received required back-to-school training on health and safety procedures. Yes

List of present school year back-to-school health and safety related professional development training:

- bloodborne pathogens
- concussions
- Opioid education
- suicide prevention

School complies with MS 121A.035 – Crisis Management Policy. Yes

Policy #806 Crisis Management

- Emergency Plan
- Risk reduction plan

Number of fire drills completed previous school year 5. (req. five annually)

Number of lockdown/safety drills completed previous school year 5. (req. five annually)

Number of tornado drills completed previous school year 1. (req. one annually) April

Number of bus evacuation drills completed previous school year: 1. (req. one annually)

Designated crisis management person / team members: Head of School, Assist Head of School, Administrative Assistant, Building Manager, HR Coordinator, and BOD Executive Member (chair, secretary, or treasurer)

Classrooms & shared spaces contain evacuation plans / procedures. Yes

NOTE: Drill logs reviewed by authorizer representative

Location of emergency drill log: copy room bulletin board

School complies with MS 299F.47 - School Inspections. Yes

Date of most recent facility inspection by fire department: 10/7/2021 (must be a minimum of every three years)

School maintains a log of all visitors. Yes Location of visitor log: front desk

School complies with MS 144.29 Health Records; Children of School Age. Yes

Responsible employee: School Employee - School Administrative Assistant Position

School complies with MS 121A.15 - Health Standards; Immunizations; School Children. Yes

Designated responsible employee: Jen Warner, nurse, Winona Health

School Nurse and License Number:

License # 1279704

Frequency of school visits: Weekly in the fall, monthly thereafter.

School complies with MS 121A.22 – Administration of Drugs and Medicine. Yes

Designated responsible health aid/employee: Jen Warner

School Nurse License # 1279704

Authorizer representative verified that the school has a system by which to record and store medicine and medical supplies.

School complies with MS 121A.21 – School Health Services (if applicable). Yes

The school contracts with a licensed school nurse or organization. Yes

Name/Organization: Jen Warner, Winona Health

School has a designated 504 Coordinator:

504 Coordinator Name & Position: Henry Schantzen, Head of School

School has a process to ensure that student accommodations are consistent with 504 Plans. Yes

Number of enrolled students during the FY24 school year on a 504 plan: 2

M/O Standard 4 - Evidence suggests that the school engages parents and students in ways that build positive relationships and engages them as partners in their child's learning.

2: Meets - The school provides ample evidence that the organization engages parents and students in ways that build positive relationships and engages them as partners in their child's learning.

1: Partially Meets - The school is making progress approaching standard.

0: Does Not Meet - The school could not provide evidence that it has a plan or activities to engage parents and students in ways that build positive relationships and engages them as partners in their child's learning.

Data Source: Annual school site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS –

Description of school plan for student / parent engagement and supporting evidence:

Evidence suggests that the school maintains and distributes annually a student/ family handbook. Yes

M/O Standard 5 - Evidence suggests that the school-teachers are covering the scope and sequence of the state academic standards and engaging in data-driven decision-making.

	2: Meets - Evidence suggests that the school has established a uniform system to ensure that the school-teachers are covering the scope and sequence of the state academic standards and monitoring student progress toward comprehension.
	1: Partially Meets - The school leadership provided some examples of how he/she provides oversight that school-teachers are covering the scope and sequence of the state academic standards, but systemic plan for monitoring progress and data-driven decision-making was lacking.
	0: Does Not Meet - The school does not have a system established to ensure that school-teachers are covering the scope and sequence of the state academic standards &/or does not engage in data-driven decision-making.

Data Source: Annual school site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS –

Most recent curriculum standards alignment review for language arts: starting in March 2024-2025

Most recent curriculum standards alignment review for math: 2018-19

Most recent curriculum standards alignment review for science: Will complete Feb. 2024

Most recent curriculum standards alignment review for social studies: 2026-27

NOTE:

Management requires that lesson plans and student learning targets are aligned to the state standards. Yes

- Description of school requirement as provided by the school: PLC's plan this way as teams, aligning Montessori philosophy with state standards as possible

School has a well-defined plan for ensuring that teachers engage in data-driven instruction to ensure student mastery of state standards. Yes

- Description of school plan provided by the school: MnMTSS committees alignment

M/O Standard 6 - The school employs highly qualified, appropriately licensed teachers.

	2: Meets - The school provides evidence of exemplary hiring processes that ensure teachers are properly credentialed. There have been no license infractions.
	1: Partially Meets - The school has had two or fewer teacher license infractions and they were swiftly resolved. Evidence suggests that the school has systems to recruit quality licensed teachers.
	0: Does Not Meet - The school has had multiple license infractions.

Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS -

(link to teacher roster with file numbers)

M/O Standard 7 - Criminal background checks are conducted on all persons per the board policy and Minn. Stat. 123B.03, Subd.1.

	2: Meets - The school provided evidence that it adheres to statute and policy pertaining to conducting criminal background checks on employees and school volunteers.
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	1: Partially Meets – N/A
	0: Does Not Meet - The school could not provide evidence that it adheres to statute and policy pertaining to conducting criminal background checks on employees and school volunteers.
Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership	
ANALYSIS: - School Evidence Provided for Authorizer Review: Background Check Policy # 404, Family Handbook pg 17 Frequency of background checks on volunteers: 2 yrs Frequency of background checks on employees: 5 yrs	

M/O Standard 8 - The school meets / maintains its enrollment goals.	
	2: Meets - The school could provide evidence that it is meeting its annual student enrollment goals.
	1: Partially Meets – N/A
	0: Does Not Meet - The school is not meeting its student enrollment goals.
Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership	
ANALYSIS – Number of students (head count) served in current year: 251 Present School Year Student Enrollment / Headcount by Grade: K - 6 - 1 – 7 - 2 - 8 - 3 - 9 - 4 - 10 - 5 - 11 - 6 - 12 - Number of students (head count) served in previous year: 22-23: 249 Number of students (head count) served in second previous year: 21-22: 244	

M/O Standard 9 - The school institutes a fair and open student admission process that complies with Minnesota law.	
	2: Meets - The school provides evidence of adherence with state laws and guidelines pertaining to student admission.
	1: Partially Meets - The school provides evidence of adherence with state laws and guidelines pertaining to student admission. The school has been the subject of state investigation with findings.
	0: Does Not Meet - The school could not provide evidence of adherence with state laws and guidelines pertaining to student admission.
Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership, website.	
ANALYSIS - Admissions Policy Number: 540 Authorizer Verifies that Student Application Form is Compliant: ____ Yes ____ No ____ Partial	

Authorizer representative verified that the school has Tennessee Warnings for enrollment process. ____ Yes ____ No ____ Partial

M/O Standard 10 - The school's employment process complies with state and federal law.

2: Meets - The school provides evidence that its employment process complies with state and federal law.

1: Partially Meets - The school is making progress meeting standard.

0: Does Not Meet - The school could not provide evidence that its employment process complies with state and federal law.

Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS -

RELEVANT POLICY NUMBERS:

- 401
-
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Authorizer representative verified that the school has Tennessee Warnings for employment process. ____ Yes ____ No ____ Partial

Evidence suggests that the school maintains and distributes annually a employee handbook Yes

M/O Standard 11 - The school has defined job descriptions and defined evaluation process for all personnel.

2: Meets - The school could provide evidence of job descriptions for all employee positions and aligned to an evaluation process.

1: Partially Meets - The school could provide evidence of job descriptions for most employee positions but did not have a defined evaluation process.

0: Does Not Meet - The school could not provide evidence of job descriptions for all employee positions and aligned to an evaluation process.

Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS -

(Link to job descriptions)

M/O Standard 12 - The school complies with IDEA, special education laws and school's TSES plan, including "Child Find." Applicable training is provided to faculty annually.

2: Meets - The school could provide evidence of compliance with IDEA, special education laws and school's TSES plan, including "Child Find."

1: Partially Meets - The school could provide evidence of compliance with IDEA, special education laws and school's TSES plan, including "Child Find." However, the school has been the subject of MDE complaint investigation with findings.

0: Does Not Meet - The school could not provide evidence of compliance with IDEA, special education laws and school's TSES plan, including "Child Find."

Data Source: School site visits, interviews with school faculty, document review.

ANALYSIS -

Brief description of school Child Find/Study Process: Outlined in the TSES

Child Study Team Members: HVED Psychologist/SPED director and coordinator, SPED teachers, Intervention teachers, AHOS, HOS, any/all staff as needed.

Name of special education teachers & license/file number:

- Brooke Kammerer 482591
- Michaela Fischer 485123
- Kim Bell 382280

Number of special education paraprofessionals: 4.99 FTE (6 physical staff)

Percent of special education students served in 2022-23 %

Percent of special education students served in 2021-22: 9.9%

Percent of special education students served in 2020-21: 10.1%

M/O Standard 13 - The school provides professional development annually to faculty on special education to ensure school compliance with Child Find and other special education laws.

2: Meets - The school could provide evidence that it provides training to faculty at least annually.

1: Partially Meets – N/A

0: Does Not Meet - The school could not provide evidence of training to faculty on special education.

Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership

ANALYSIS -

Faculty Training Topic(s) and Dates(s): 9/25/23

- TSES
- Restrictive Procedures
- Child Find process

M/O Standard 14 - The school is not subject to special education investigations by MDE and is not in Corrective Action.

2: Meets - The school is not subject to special education investigations by MDE and is not in corrective action or is adhering to their plan to resolve concerns.

1: Partially Meets - The school has been the subject of MDE investigations with findings. Progress has been observed to resolve findings.

0: Does Not Meet - The school has been the subject of MDE investigations with findings. Findings have not been resolved.

Data Source: Annual site visits, annual submission calendar document review, discussions with school leadership, MDE communications.

ANALYSIS – none

If yes,

Isolated incident/complaint:

Program systems complaint:

Resolved: Yes / No

School Evidence for Authorizer Review:

ROUTINE SPECIAL EDUCATION AUDITS –

Date of last special education program audit: self audit April 1, 2018.

Date of last special education financial audit: Annual CLA audit 12/29/22

Current audit stage:

M/O Standard 15 - The school is compliant with laws pertaining to special education directors and Advisor Council (SEAC).

2: Meets - The school could provide evidence that it is compliant with laws pertaining to special education directors and Advisor Council (SEAC).

1: Partially Meets - The school contracts with a special education director but could not provide evidence that it has a SEAC that meets at least annually.

0: Does Not Meet - The school could not provide evidence that it is compliant with laws pertaining to special education directors and Advisor Council (SEAC).

Data Source: Annual site visits, annual submission calendar document review, discussions with school faculty.

ANALYSIS -

Name of director and organization: Tracy Tweeten-Lind, Hiawatha Valley Education District
Special Education Director License Number: #446246

Fall 2023 Meeting: Thursday, November 30, 2023, 6:30 PM

Winter 2024 Meeting: Monday, January 29, 2024, 6:30 PM

Spring 2024 Meeting: Monday, April 29, 2024, 6:30 PM

Summer 2024 Meeting: Monday, July 29, 2024, 6:30 PM

MISCELLANIOUS CHARTER CONTRACT COMPLIANCE ITEMS

ITEM	CONTRACT PROVISION	MEETS	PARTIALLY MEETS	DOES NOT MEET
1	Evidence suggests that the school is adhering to their plan for standardized interim assessments and utilizing that student performance data (contract Article 7).			

2023-24 School Plan for Standardized Assessments:

Authorizer representative was able to verify that the testing calendar is on website per state statute Yes

SCHOOL WEBSITE URL CODE FOR CALENDAR: <https://www.bluffviewmontessori.org/explorers/assessments/>

II	Evidence suggests that the Board of Directors maintains at least the amount and types of insurance coverage up to the applicable tort liability limits under Chapter 466.04 and Article six of the contract – Types and Amounts of Insurance. The School provide the Authorizer with certificates of insurance at least annually (contract Article 6).			
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School Provided Authorizer with Proof of Insurance / Insurance Certificate Yes

Insurance Policy Renewal Date:

III	Evidence suggests that the school is only serving their authorized grades and approved school sites (contract Article 4 and 5).			
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Grades Served Present School Year: 33 months-gr 8

Grades Served Past School Year: 33 months-gr 8

State Approved Grades: 33 months-gr 8

Number of Approved School Sites/Buildings: 1

Number of School Sites/Buildings Operated: 1

Evidence Provide by the School for Authorizer Review: walk through of the facility.

IV	Evidence suggests that the school is non-sectarian in its program, admission policies, and employment practices, and for all other purposes (contract Article 4 and 6).			
LIST OF APPLICABLE SCHOOL POLICY TITLES AND NUMBERS: <ul style="list-style-type: none"> • 609 • 801 				
V	The school's VOA-MN Compliance Binder is complete (contract Addendum B). <i>NOTE: The school should obtain a copy of their Renewal Notice from the MN Office of the Attorney General.</i>			
VI	Evidence suggests that the school adheres to their human resources policies and procedures (contract Article 6 and Article 8).			
Explanation:				
VII	Evidence suggests that the school complies with the Minnesota Human Rights Act, Chapter 363, which prohibits unfair discriminatory practices in employment, public accommodations, public service, or education (contract Article 8).			
LIST OF APPLICABLE SCHOOL BOARD POLICIES: (Name <u>and</u> Number) <ul style="list-style-type: none"> • 102 • 103 • 401 • 402 • 609 • 801 <p>School Designated Human Resources Person:</p> <p>EEO Grievance Designee:</p> <p>School District Human Rights Officer:</p> <p>School Evidence Provide for Authorizer Review:</p>				
VIII	Evidence suggests that faculty performance observations and evaluations are conducted according to established policy/manual and consistent with state law, including director evaluation (contract Article 6 and Addendum A).			
School Evidence Provided for Authorizer Review:				
IX	Evidence suggests that the school complies with state and federal laws pertaining to data collection storage, and distribution (contract Article 8).			
<p>2023-24 School Appointed DPA Responsible Authority (RA): Renee Knutson, HR</p> <p>2023-24 School DPA Designated Authority (DA): Henry Schantzen, HOS</p> <p>2023-24 School Data Practices Compliance Official (DPCO): Mariah White, BOD Chair</p> <p>NOTE: Authorizer provided sample VOAMN school policies to the Head of School.</p> <p>APPLICABLE BOARD POLICIES: (Titles <u>and</u> Numbers)</p> <ul style="list-style-type: none"> • Policy # 722 - Data Practices • Policy #752 - Document Retention and Destruction <p>Authorizer representative verified that the School has a data retention plan: Yes</p> <ul style="list-style-type: none"> • Date of board approval: June 2020 • Date of Historical Society Approval: June 202 <p>Authorizer representative verified that Student <u>academic</u> records are filed in a separate locked cabinet.</p> <p>____ Yes ____ No Location: _____</p> <p>Authorizer representative verified that Student / Employee <u>legal</u> records are filed in a separate locked cabinet. ____ Yes ____ No</p> <p>Location: _____</p>				

Authorizer representative verified that Student/Employee health records are filed in a separate locked cabinet. ____ Yes ____ No
Location: _____

Authorizer representative verified that the school has Tennessee Warnings for both the enrollment and employment process. ____
Yes ____ No ____ Partial

School verified that only designated school employees have access to files containing student/employee records.
____ Yes ____ No

School has a board approved Data Request Policy / Procedures. ____ Yes ____ No
School evidence provide for Authorizer Review: Policy #722 Public Data Requests

Authorizer representative verified that the school maintains a detailed register/log of all data requests: Yes

X. School Website Content Requirements (School will walk through website with a during visit to verify compliance)		URL
I	Current Annual Report (required components in (MS 124E.16, Subd 2)	https://www.bluffviewmontessori.org/school-board/worlds-best-workforce-plan/
II	World's Best Workforce Annual Report (using MDE template) (MS 120B.11)	https://www.bluffviewmontessori.org/school-board/worlds-best-workforce-plan/
III	Identity of and contact information for the authorizer (MS 124E.07, Subd 8)	https://www.bluffviewmontessori.org/school-board/charter-school-authorizer/
IV	Directory information for board <u>and</u> committee members (name, phone, email, affiliation) (MS 124E.07, Subd 8)	https://www.bluffviewmontessori.org/school-board/committees/
V	Board and committee meeting minutes (if authority) for at least one calendar year. (MS 124E.07, Subd 8)	https://www.bluffviewmontessori.org/school-board/board-meeting-documents/
VI	Literacy plan including English Learners (for schools with grades K-3) (MS 120B.12, Subd 4)	https://www.bluffviewmontessori.org/wp-content/uploads/23-24-Read-Well-by-Third-Grade-1.pdf
VII	Collaborative Agreements (if they exist) (MS 124E.08 (c))	https://www.bluffviewmontessori.org/collaborative-agreements/
VIII	Wellness Policy / Plan (MS 121A.215)	https://www.bluffviewmontessori.org/wp-content/uploads/533-Wellness.pdf
IX	Lottery and enrollment policy and process (MS 124E.11)	https://www.bluffviewmontessori.org/wp-content/uploads/540-Admissions-Enrollment-1-1.pdf
X	Calendar of standardized tests to be administered during the year (with rationales) (MS 120B.301)	https://www.bluffviewmontessori.org/explorers/assessments/
XI	School Bullying Policy (MS 121A.031) Policy 514	https://www.bluffviewmontessori.org/wp-content/uploads/514-Bullying-Prohibition-1.pdf
XII	Policy for group health (MS 124E.12, Subd 5)	NA
XIII	Early admission policy (comprehensive evaluation needed for under age 5 to kindergarten) (MS 124E.11)	NA
XIV	PSEO Dissemination of Information (124D.09, Subd 7)	NA
XV	Name, mailing address, bylaws, minutes of board meetings, names of the current board of directors of the affiliated nonprofit building corporation (if exists) (MS 124E.13)	https://www.bluffviewmontessori.org/school-board/bms-building-corporation-faq/