



October 21, 2020

Ann Marie Dunbar, Board Chair  
Henry Schantzen, Head of School  
Bluffview Montessori School  
1321 Gilmore Avenue,  
Winona, MN 55987

Dear Ms. Dunbar and Mr. Schantzen:

The Bluffview Montessori School (BMS) Transfer of Authorizer Application to Volunteers of American - Minnesota (VOA-MN) was received by VOA-MN on September 19, 2020. The Bluffview Change of Authorizer Application received a thorough desk review by three VOA-MN school leadership peers and the financial audits were reviewed by our VOA-MN Financial Analyst.

This letter also contains the peer reviewer **initial** comments or concerns organized by section of the BMS Change of Authorizer Application (text in italics are areas that BMS should be prepared to emphasize further during the interview process). The same three peer reviewers will be convening the interview process on Monday, October 26, 2020 at 11:00 a.m. via Zoom after which they will provide their final recommendation to the VOA-MN Charter School Authorizing Program leadership.

#### I: EXECUTIVE SUMMARY

- SP: The application contained a succinct summary of important points of the school's 53-year history.
- TT: *No rationale for a change in authorizer is given. There is no argument for choosing VOAMN as a potential authorizer. (Reviewer rendered section unsatisfactory)*
- TO: BMS clearly states the need for a new authorizer and lays out how their philosophy aligns with VOAMN.

#### II. LEARNING PROGRAM

- SP: *The application provided a very clear and compelling overview of the methods and benefits of a Montessori education. The reviewer was unable to find the chart key for the linked growth data. Similar difficulty encountered with Figures, 1, 2, 4, 5, 6, 10, 11 of the Academic Report. Also, most of the Academic Report's Table data is incomplete. The applicant should clarify if comparison school used for VOA-MN standards is La Crescent Montessori or another school or district. The applicant should also add a minimal description in the "Analysis" box for VOA-MN Academic standards 4, 5, and 6. (Reviewer scored section partially satisfactory)*
- TT: The educational philosophy of the school is well described, with a good overview of curricula, tools, and methods and instructional techniques to support that philosophy. There are good allusions to the founder of Montessori philosophy, Dr. Maria Montessori and other allusions to supporting research. There is also adequate discussion of how the learning program aligns with the school's mission, vision, and goals, *although the vision statement seems more embedded in the present than the future. There is no "we will" statement.*
- TO: Clear evidence that the school is outperforming alternatives in the area and is committed to academic excellence.

#### III. FINANCIAL MANAGEMENT AND SUSTAINABILITY

- SP: The reviewer finds school's financials to be in order, with a growing fund balance in preparation for future state holdbacks. Reviewer shares concerns for challenges of paying staff comparably to pay scales in Minnesota

district schools, as mentioned in the application's cover letter. *Nothing stood out in the financial documents pointing to the school's ability to meet that need.*

- TT: The application demonstrates a history of sound school finances. The application clearly describes appropriate board of directors oversight of financial sustainability and gives a good job description for the Treasurer. The reviewer believes BKDV is an excellent organization to work with. The application discusses MACS trainings and other financial trainings that make sure the board has a strong working knowledge of the school's financials.
- TO: From the materials provided it is clear that BMS has not only annual fiscal responsibility, but also has a vision for maintaining long-term viability. This will be very important through the uncertain times ahead.

#### IV. BOARD GOVERNANCE

- SP: Board training cycle is impressive to the reviewer. Excellent engagement of interested experts from Winona's university communities to round out the board.
- TT: The school's governance model is clearly explained, and there are good background descriptions pointing out the qualifications and/or competency of each board member. The school also has a governance committee that is responsible for the board election process and oversees letters of employment.
- TO: BMS was able to communicate a clear structure for governance. They also clearly communicated the structures in place to continue to regularly review and assess their effectiveness in governance. They appear to meet all of the requirements necessary for a successful charter school.

#### V. SCHOOL MANAGEMENT & OPERATIONS

- SP: Separation of duties between Head of School and Assistant Head of School are clear. With few office staff and the related difficulties in segregation of duties and internal controls, Bluffview can be commended for ongoing clean audits.
- TT: The school's leadership structure is well explained, and job descriptions of school leaders are clear. There is also a good description of the school's facility, complete with virtual tour.
- TO: BMS clearly communicated the management structure of their organization. The structures in place appear to be very consistent with structures that are in place for many of the most successful charter schools in the state.

Applicants must earn a base score of no less than 90 percent (satisfactory rating in all categories).

Thank you for seeking VOA-MN as the future authorizer of Bluffview Montessori School. We look forward to meeting with BMS representatives during your application interview on Monday, October 26<sup>th</sup> from 11:00 a.m. -12:00 p.m. Please let me know if you have any questions.

Sincerely,



Stephanie Olsen, Manager  
Charter School Authorizing Program