



## ***BLUFFVIEW MONTESSORI SCHOOL***

### **ANNUAL SCORECARD REPORT**

**PUBLISHED SPRING 2023 for FY22**

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### **Volunteers of America of Minnesota Accountability Plan**

According to Minnesota Statute 124E.01, subd.1, *The primary purpose of charter schools is to improve all pupil learning and all student achievement.* VOA-MN holds the schools it authorizes accountable in five major areas: academic performance, fiscal management, board governance, management and operations, and legal compliance. Each area may have multiple indicators of success and the charter school's performance on each indicator will be rated.

**Rating Scale: For each standard, a school earns points for contract renewal as follows:**

2 = Meets Standard

1 = Partially Meets Standard

0 = Does Not Meet Standard

**Weighting of Performance Measures used during the contract renewal process is as follows:**

50% weighting: Academic Program (statutory purposes, including primary purpose)

15% weighting: Financial Sustainability

30% weighting: Organization

15% governance

15% management & compliance

### **Combining Data Over the Contract Term**

Annual school performance results will be combined each successive year of the contract term wherever possible so that fluctuation due to small group size will be minimized and overall performance is accurately reflected.

### **Contract Renewal Eligibility**

VOA-MN schools must achieve at least a Satisfactory Rating (70% of points possible) in the Performance Framework overall and meet the majority of standards in each performance area (Academic, Financial, Organizational Performance) to be eligible for a three-year contract renewal and at least an Exemplary Rating (80% of points possible) in the Performance Framework overall and meet the majority of standards in each performance area to be eligible for a five-year contract renewal. All contract renewals will be for either three or five years. Fewer than three years does not provide enough information on which to make a renewal decision.

Renewal contract length is based on an average of school's performance over the term of the contract. Renewal decisions for a three-year or five-year contract term will be based on two and four fiscal years of data respectively.

If a school is performing below standard to receive a three-year renewal contract, but has agreed to the authorizer terms and conditions set forth in the School Improvement Plan to correct areas of deficiency, VOA-MN may

agree to extend a school's contract (not to exceed five years) to provide additional time for a school to improve performance as an alternative to termination. If sufficient school improvement is not being made by the end of the 1st year of the extension, termination proceedings will commence.

### **Intervention and Corrective Action**

VOA-MN schools that, prior to their year of contract renewal, fall below a Satisfactory Rating in the Performance Framework overall and/or in any performance area (Academic, Finance, Governance, Management/Operations) must enter into a School Improvement Plan that addresses the specific standards in the Performance Framework where the school performance is below Satisfactory.

### **Closure Plan**

If the school does not meet the terms of the School Improvement Plan and attain a Satisfactory Rating by the end of the contract term, the school is a candidate for nonrenewal. If the school's contract is not renewed, the school must implement the Closure Plan as described in the school's charter contract.

### **Three essential questions guide our VOA-MN authorizer oversight and charter school accountability plan.**

- **Academic Program Performance** - Is the school's Learning Program a Success?
- **Financial Sustainability** – Does the School Exhibit Strong Financial Health?
- **Board Governance & Management/Operations** - Is the organization effective and well run?

In addition to VOA-MN defined "performance standards," a charter school must also be meeting their statutory purposes which are measured as part of Academic Performance Oversight.

**REPORT PURPOSE:** The Annual School "Scorecard" Report is the VOA-MN Authorizing Program's official communication to the school on performance meeting statutory purposes and VOA-MN Performance Standards. The report is comprised of three sections aligned to the three essential questions that guide our authorizer oversight and charter school accountability plan.

**2021-2022 VOA-MN SCHOOL SITE VISIT DATES:** October 4, 2021; April 29, 2022

**2022-2023 VOA-MN SCHOOL SITE VISIT DATES:** October 6, 2022; May 4, 2023

**2021-2022 VOA-MN SCHOOL BOARD OBSERVATION DATES:** July 22, 2021; May 26, 2022

## **SECTION ONE**

### **Academic Program Performance - Is the school's Learning Program a Success?**

Academic Performance- All public schools, including charters, must fully participate in the state assessments - Minnesota Comprehensive Assessments. Data from state assessments as well as Title 1 Designation consistent with the state North Star system will be compiled and evaluated in the Annual VOA-MN Authorized Charter Schools Academic Performance Report by the authorizer. Charter schools are required to meet the academic performance standards for which they agree to be held accountable in their charter contract. The extent to which a school is meeting their World's Best Workforce requirements and additional statutory purposes are also measured in the Learning program section.

The VOA-MN Charter School Authorizing Program publishes annually an Academic Performance Report on their network of authorized charter schools. The report serves as a single annual source of academic program and performance information for all of our VOA-MN operational charter schools. The report contains an analysis of annual and cumulative academic program, performance, and professional development data for each school.

Content from the annual Academic Performance Report also serves as the basis for the school academic performance analysis contained in the statutorily required Contract Renewal Evaluation Reports, including evaluation of the extent to which the school has met their primary purpose, "to improve all pupil learning and all student achievement" during the contract term.

The VOA-MN determined academic performance standards contained below are uniform for all VOA-MN charter schools. The standards are contained in VOA-MN Charter Contract Addendum B (School Accountability and Authorizer Oversight System) and serve as the basis for both annual authorizer monitoring of school academic performance and contract renewal determinations. The authorizer reserves the right to have flexibility to reasonably amend these standards /expectations as needed (example: based on cell size being too small). One sample rating scale is imbedded below to provide the reader with context.

VOA-MN's academic performance standards/expectations are scored below.

## SCHOOL STATUTORY PURPOSES:

- ❑ **SCHOOL PRIMARY PURPOSE** (M.S. 124E.01): The primary purpose of the charter school is to improve all pupil learning and all student achievement.  
MEASURE: MCA exams  
PERFORMANCE STANDARDS / EXPECTATIONS: Academic Performance Standards section below.  
REPORTING: The extent to which the school is meeting this purpose will also be measured in the VOAMN Annual Network Academic Performance Report.
- ❑ **SCHOOL STATUTORY PURPOSE II** (MS 124E.01): Increase learning opportunities for all pupils.  
PERFORMANCE EXPECTATIONS – The school will incorporate project-based and services learning into the school program. Project-based and service learning will include locally determined specific learning outcomes students are to achieve.  
REPORTING: The extent to which the school is meeting this purpose will also be measured in the VOAMN Annual Network Academic Performance Report.
- ❑ **ADDITIONAL PURPOSE** (M.S. 120B.11) **WBWF**: The school is to meet the outcomes adopted by the Commissioner for all public school students under Minnesota Statutes, section 120B.11 (“World’s Best Workforce”), applicable to elementary schools. Specifically, that 1) all racial and economic achievement gaps between students are closed; 2) all children are ready for school, 3) all third-graders can read at grade level.  
GOALS: locally determined, board approved annually for each of the outcomes.  
REPORTING: Element of the Annual Report and “World’s Best Workforce” Plan and will be evaluated in the annual Authorizer Network Academic Performance Report.

<b>Academic Performance Standard 1</b> - Students are performing well on state examinations in comparison to students at schools they might otherwise attend (with similar demographics) as evidence of meeting their primary statutory purpose of improving all pupil learning and all student achievement. Imbedded WBWF. A school may also use a nationally normed exam as a supplemental indicator.	
<b>X</b>	<b>2: Meets</b> - School's average proficiency rate exceeds the average performance of students in schools they might otherwise attend.
	<b>1: Partially Meets</b> - School's average proficiency rate meets or exceeds the average performance of students in schools they might otherwise attend in one or two subjects (math, reading and science) but not all three.
	<b>0: Does Not Meet</b> - School's average proficiency rate is less than the average performance of students in schools they might otherwise attend.
<b>Data Source:</b> Minnesota Department of Education	
<b>Analysis:</b> BMS is currently outperforming the comparison school in math, reading and science.	

<b>Academic Performance Standard 2</b> - Over the term of the contract, the school will maintain a combined average state-determined minimum achievement level of (Increased + Maintained) as evidence of meeting their primary statutory purpose of improving all pupil learning and all student achievement. (In 2022, the combined statewide average (math + reading) was 61.6%. This score was calculated by adding the statewide math and reading results and then dividing by two.)	
<b>X</b>	<b>2: Meets</b> - School's achievement level of "increased and maintained" is 61.6% or higher.
	<b>1: Partially Meets</b> - School's achievement level of "increased and maintained" is between 61.5% and 46.7%.
	<b>0: Does Not Meet</b> - School's achievement level of "increased and maintained" is below 46.6%.

**Data Source:** North Star Academic Progress. A school may also use a nationally normed exam as a supplemental indicator.

**Analysis:** The school's academic achievement level (improved + maintained) was 60.0% for math and 75.8% for reading. A score of meets was awarded because the school's combined score was 67.9%.

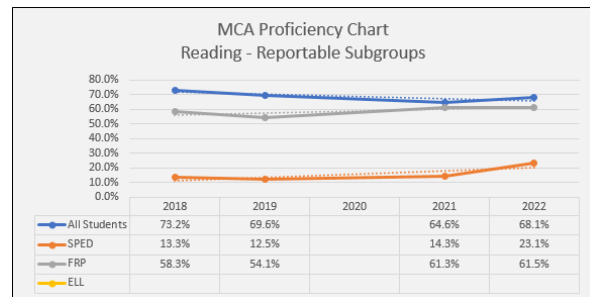
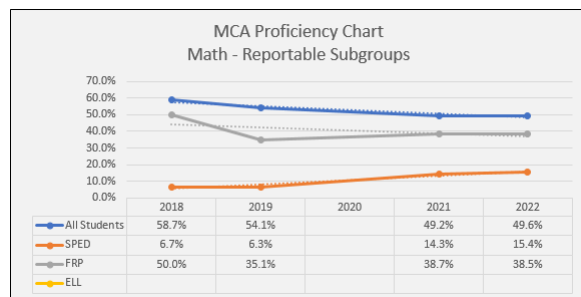
**Academic Performance Standard 3** - The difference between the "all-students" proficiency rate in the School and any reportable student group proficiency rate will be reduced over the term of the contract in both reading and math using state examination data as evidence of the School meeting their primary statutory purpose of improving all pupil learning and all student achievement. Imbedded WBWF Standard: all racial and economic achievement gaps between students are closed.

	<b>2: Meets</b> - The difference between the "all-students" proficiency rate and all student group proficiency rates has been reduced.
<b>X</b>	<b>1: Partially Meets</b> - The difference between the "all-students" proficiency rate and at least one student group proficiency rate has been reduced.
	<b>0: Does Not Meet</b> - The difference between the "all-students" proficiency rate and all reportable student group proficiency rates has increased.

**Data Source:** Minnesota Department of Education. A school may also use a nationally normed exam as a supplemental indicator.

**Analysis:** A score of partially meets was awarded because the school reduced the achievement gap in two out of the four possible areas. The achievement gap between the "All Students" group and the Special Education subgroup was reduced in both math and reading from 2021 to 2022.

Math				Reading			
	2021 Gap	2022 Gap	Gap Reduced		2021 Gap	2022 Gap	Gap Reduced
SPED	34.9%	34.2%	Yes	SPED	50.3%	45.0%	Yes
FRP	10.5%	11.1%	No	FRP	3.3%	6.6%	No
EL	CTSTR	CTSTR		EL	CTSTR	CTSTR	



**Academic Performance Standard 4** - The school has adopted a formal teacher evaluation process and adheres to the requirements set forth in Minnesota Statute 122A.40.

<b>X</b>	<b>2: Meets</b> - Meets all criteria and is adhered to.
	<b>1: Partially Meets</b> - Meets some of the criteria, but no evidence that process is followed.
	<b>0: Does Not Meet</b> - School has not adopted a teacher evaluation process.

**Data Source:** School Annual Report

**Analysis:** The BMS teacher observation and development model utilizes Charlotte Danielson's Framework for Teaching as a part of its formal teacher evaluation process. Teachers are evaluated on four domains: planning and preparation, the classroom environment, instruction, and professional responsibilities. The teacher evaluation process includes a short observation, a formal observation, self-reflection as well as a summative evaluation.

**Academic Performance Standard 5** - All teachers are supported through a school-wide professional development plan that is based on analysis of assessment data and directly linked to improving all pupil learning and all student achievement.

<b>X</b>	<b>2: Meets</b> - The school has adopted and followed a school-wide, data-driven professional development plan.
	<b>1: Partially Meets</b> - The school has a school-wide professional development plan, but the reviewer could not conclude that the plan was tied to data-driven decision-making.
	<b>0: Does Not Meet</b> - The school has not adopted a school-wide professional development plan.
<b>Data Source:</b> School Annual Report	
<b>Analysis:</b> BMS has adopted a school-wide Professional development plan. Professional development that was provided or attended during the 2021-2022 school year includes but was not limited to the following: Fastbridge primer, Trauma Informed Practices, Creativity in the Montessori Classroom, and IXL Training. In addition, the school has implemented an individual growth and development plan that requires teachers to have at least one professional growth goal. Growth goals are based on individual teacher's areas for growth and should support school and/or professional learning community priorities, goals, and activities.	

<b>Academic Performance Standard 6</b> - The school is meeting their additional statutory purposes (MS 124E.01, Subd 1; Charter Contract Addendum B).	
<b>X</b>	<b>2: Meets</b> - The school has a plan and is meeting their additional statutory purposes.
	<b>1: Partially Meets</b> - The school has a plan for meeting their additional statutory purposes and is partially meeting them.
	<b>0: Does Not Meet</b> - The school does not have a plan for meeting their additional statutory purposes and measuring progress.
<b>Data Source:</b> School Annual Report	
<b>Analysis:</b> The school has a plan for meeting their additional statutory purposes. BMS implements multi-aged classrooms that allow students to stretch their minds rather than being constrained by grade or age. The school's adolescent program includes a business education where middle school students run a community coffee house. BMS also implements a tiered intervention program as well as school-wide positive behavioral interventions and supports.	

<b>Academic Performance Standard 7</b> - The school is meeting the World's Best Workforce goals (MS 120B.11; Charter Contract Addendum B). Refer to VOA Standard #3 for Achievement Gap goals.	
	<b>2: Meets</b> - The school has a plan and is meeting their WBWF goals.
<b>X</b>	<b>1: Partially Meets</b> - The school has a plan for meeting their WBWF goals and measuring progress.
	<b>0: Does Not Meet</b> - The school does not have a plan for meeting their WBWF goals and measuring progress.
<b>Data Source:</b> School Annual Report	
<b>Analysis:</b>	
<b>Goal #1 All Students Ready for School</b>	
The PK4 students will increase their phonetic awareness from an average of 1.8 cursive letters/sounds mastered in mid-November to an average of 10 letters/sounds mastered during the spring Fastbridge screening window.	
<b>Result: Goal Met</b> 13.7 letters/sounds mastered	
<b>Goal #2 All Students in third Grade Achieving Grade Level Literacy</b>	
Increase the percentage of third grade students meeting or exceeding FastBridge literacy benchmarks (reading) from 82% on the Fall screener to 85% on the Spring screener.	
<b>Result: Goal Not Met</b> 84%	
<b>Goal #4 All Students Career and College Ready by Graduation</b>	
All 8 <sup>th</sup> grade students will participate in a career exploration assessment.	
<b>Result: Goal Met</b> 100%	

**SECTION TOTAL:** 5/7 Standards Met

2/7 Standards Partially Met

0/7 Standards Not Met

## SECTION TWO



## FINANCIAL SUSTAINABILITY – Does the School Exhibit Strong Financial Health?

Charter schools receive public funds and must meet generally accepted standards of fiscal management. It is VOA-MN's duty to ensure that the schools are responsible stewards of public funds. The charter school shall provide VOA with a copy of its draft and final annual budgets and monthly cash flow projections for each fiscal year by July 1 of each fiscal year. VOA-MN shall use submitted budget and cash flow statements, along with any other relevant information, to determine if the charter school has a realistic balanced budget plan for the current year. VOA-MN shall use the financial statements presented in the charter school's annual financial audit, along with any other relevant information, to determine if the charter school maintained a balanced budget during the prior-year. Schools are expected to have audits that are free of all findings.

The VOA-MN Charter School Authorizing Program publishes annually a School Financial Oversight Report on their network of authorized charter schools. The parties acknowledge that the Minnesota Charter Schools Law requires a charter school to meet generally accepted standards of fiscal management. This requirement has two underlying purposes: to monitor the financial health of the school and compliance with state and federal laws, including proper use of public funds. The report will contain an evaluation of school performance meeting the VOA-MN financial standards.

The VOA-MN determined school financial standards contained below are uniform for all VOA-MN charter schools. The standards are contained in VOA-MN Charter Contract Addendum B (School Accountability and Authorizer Oversight System) and serve as the basis for both annual authorizer monitoring of school financial health and contract renewal determinations. The authorizer will monitor school performance meeting these standards on an ongoing basis and the standards will be evaluated in the annual VOA-MN Network Finance Report. The standards also serve as the criteria for contract renewal determinations. The authorizer reserves the right to have flexibility to reasonably amend these standards /expectations as needed (example: fund balance standard may be negotiated based on school length of operation or size). One sample rating scale is imbedded below to provide the reader with context.

VOA-MN's school financial standards/expectations are scored below.

Financial Standard 1 - The School maintains a balanced budget.	
X	2: Meets - Surplus position
	1: Partially Meets - NA
	0: Does Not Meet - Deficit position
Data Source: Original and revised budgets, annual financial audit report, monthly income statements.	
Analysis: The school board approved the FY 2022 original budget in April 2021 based on 212 students and a resulting deficit of \$17,328. The budget was revised to reflect an operating surplus of \$11,361. The school ended the year with 212 ADMs and a surplus of \$6,800.	
Regarding financial performance, the FY 2022 financial audit noted the following:	
FINANCIAL HIGHLIGHTS	
Key financial highlights for the 2022 fiscal year include the following:	
<ul style="list-style-type: none"><li>The unassigned fund balance of the General Fund is at 41.7% of annual expenditures, after a fund balance increase of \$6,800, as of June 30, 2022.</li><li>Overall General Fund revenues were \$2,806,160 as compared to \$2,808,116 of expenditures.</li><li>Net position of the combined entity decreased by \$104,602 from June 30, 2021.</li></ul>	
Regarding the General Fund Budget, the FY 2022 financial audit noted the following:	
Total General Fund revenues on a net basis were \$40,322 (or 1.4%) lower than the final amended budget amount while total expenditures were \$32,008 (or 1.1%) lower than had been budgeted. As part of any budget update initiated for fiscal 2022-23, the Board will want to take these variances into	

consideration in order to limit budget differences to every extent possible. We recommend that budget variances in a charter school environment (which is more volatile than in a traditional school environment but on a much smaller scale) be limited to 1% to 2% on either side of zero once the School's program has matured and stabilized. The School has done a great job budgeting to keep within the recommended variances. We encourage you to continue the practice of undertaking mid-year budget reviews resulting in the adoption of a revised General Fund budget when updated information becomes available.

The school has maintained a balanced budget in FY 2022.

**Financial Standard 2** - The School is compliant with state and federal financial reporting deadlines and laws, including the proper use of public funds.

<b>X</b>	<b>2: Meets</b> - 2 = Never missed
	<b>1: Partially Meets</b> – Missed one time
	<b>0: Does Not Meet</b> - Missed > 1 time

**Data Source:** Preliminary UFARS data, ADM report, final UFARS data.

**Analysis:** The VOA-MN financial analyst did not discover any missed state or federal financial reporting deadlines through June 2022.

**Financial Standard 3** - The School's financial audit is submitted to the Minnesota Department of Education, Office of the State Auditor and the authorizer by December 31.

<b>X</b>	<b>2: Meets</b> - Submitted
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - Not submitted

**Data Source:** Email and attached MDE documentation from the School confirming the submission of the audit report.

**Analysis:** The school submitted its financial audit to the MDE by December 31, 2022.

**Financial Standard 4** - Schools are expected to have audits that are free of all findings.

<b>X</b>	<b>2: Meets</b> – No findings
	<b>1: Partially Meets</b> - 1 or more “significant deficiency” finding(s)
	<b>0: Does Not Meet</b> - 1 or more “material weakness” or legal compliance finding(s)

**Data Source:** The School's financial audit report.

**Analysis:** The school's FY 2022 financial audit contained no findings as noted in this excerpt from the FY 2022 Executive Audit Summary:

*The We prepared this Executive Audit Summary and Management Report in conjunction with our audit of the School's financial records for the year ended June 30, 2022. We appreciated the time that staff took to work with us to complete the engagement.*

*Audit Opinion – The financial statements are fairly stated. We issued what is known as a “clean” audit report.*

*Yellow Book Opinion – No compliance issues were noted in our review of laws, regulations, contracts, and grants that could have significant financial implications to the School.*

*Internal Controls – There were no material weaknesses noted in the current year related to internal controls.*

*Legal Compliance – No Minnesota legal compliance findings were noted.*

**Financial Standard 5** - The School is current on all financial obligations, including, but not limited to: pension payments, payroll taxes, insurance coverage and loan payments.

<b>X</b>	<b>2: Meets</b> - Never late
	<b>1: Partially Meets</b> - Late 1-2 times
	<b>0: Does Not Meet</b> - Late > 3 times
<b>Data Source:</b> Monthly check registers, cash flow projections, board meeting agendas and minutes.	
<b>Analysis:</b> The VOA-MN financial analyst did not discover any delinquent or late payments to vendors of the school through June 2022.	

<b>Financial Standard 6</b> - The School provides VOA-MN and school board members with monthly financials. June financial reports may be delayed until year-end journal entries are completed. Packets include at least the following: 1) detailed income/expense report, 2) cash flow projection, 3) check register, and 4) current enrollment (Average Daily Membership). The board should review and approve the financials at each board meeting.	
<b>X</b>	<b>2: Meets</b> - Never missed
	<b>1: Partially Meets</b> - Missed 1-2 times
	<b>0: Does Not Meet</b> - Missed > 2 times
<b>Data Source:</b> Board packets	
<b>Analysis:</b> The school has consistently provided complete financial reports in the monthly board packets to VOA-MN and the school board for FY 2022.	

<b>Financial Standard 7</b> - The School develops and maintains a targeted General Fund balance determined by the School Board. For the finance report, VOA-MN also determines a standard for fund balance annually based on items such as school funding trends and funding hold-backs.	
<b>X</b>	<b>2: Meets</b> - 20% or >
	<b>1: Partially Meets</b> - 15-20%
	<b>0: Does Not Meet</b> - < 15%
<b>Data Source:</b> The School's General Fund balance policy, monthly financial reports, board meeting agendas and minutes.	
<b>Analysis:</b> The school board has a General Fund balance policy that states: <i>Bluffview Montessori School will strive to maintain a minimum unassigned general fund balance of 30 percent of the annual budget.</i>	
An excerpt from the Executive Audit Summary stated the following regarding the General Fund Balance: <i>The School's General Fund experienced an increase in fund balance during fiscal 2021-22 of \$6,800 ending at \$1,188,653 as of June 30, 2022. We recommend that a charter school develop a long-range plan which develops and maintains a target fund balance that is at least 20% to 25% of annual expenditures. The ending fund balance at June 30, 2022, for Bluffview Montessori School represents 42.3% of expenditures incurred for the year and is an important aspect in the School's financial wellbeing since a healthy fund balance represents things such as cashflow, as a cushion against unanticipated expenditures, enrollment declines, state aid metering changes, funding efficiencies and aid prorrations at the state level and similar problems.</i>	
The school has maintained a General Fund balance in excess of the schools policy and the authorizers target for FY 2022.	

<b>Financial Standard 8</b> - The School Board has a finance committee that meets regularly to review financial reports.	
<b>X</b>	<b>2: Meets</b> - 8-12 meetings/year
	<b>1: Partially Meets</b> - 5-7 meetings/year
	<b>0: Does Not Meet</b> - 0-4 meetings/year
<b>Data Source:</b> Board meeting agendas and minutes.	
<b>Analysis:</b> The school has a finance committee that met eight times in FY 2022 and is doing the appropriate work.	

<b>Financial Standard 9</b> - All finance committee members exhibit working knowledge of financial oversight.	
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<b>X</b>	<b>2: Meets</b> - All committee members have received formal/informal training during the year relating to their roles and responsibilities on the finance committee.
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - Some committee members have not received formal/informal training during the year relating to their roles and responsibilities on the finance committee.
<b>Data Source:</b> Query school board members, board meeting agendas and minutes.	
<b>Analysis:</b> All finance committee members have received training in FY 2022. The following is an excerpt from an email received from the school director on January 9, 2022:	
<i>All members of the Finance Committee last year were members of the school board, and they receive finance training as a new board member and BerganKDV does an annual finance training for us each October. We also have our endowment manager attend a meeting each quarter and update/educate us on the plans for that account.</i>	
<i>This year, the new member of the committee is receiving ongoing training from me, and we had a one-one session to go over the VOA expectations of ADMS, checks in order/sequential, reviewing vendors on the supplementals, and looking at the financials as from a macro view first, but reviewing the % of the fiscal year that has passed, then looking at the % usage of each line item to look for flags. Then we discuss obvious ones that are at 100%ish right away like the insurance line item.</i>	

<b>Financial Standard 10</b> - The school is not in Statutory Operating Debt (SOD).	
<b>X</b>	<b>2: Meets</b> – The school is not in SOD
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> – The school is in SOD
<b>Data Source:</b> The School's budget, board meeting agendas and minutes, financial audit.	
<b>Analysis:</b> The school is not in Statutory Operating Debt.	

**SECTION TOTAL:** 10/10 Standards Met      0/10 Standards Partially Met      0/10 Standards Not Met

### SECTION THREE

#### SCHOOL BOARD GOVERNANCE & OPERATIONS - Is the organization effective and well run?

##### ○ PART ONE: SCHOOL BOARD GOVERNANCE

Effective board governance is essential to the successful start-up and operation of a public charter school. The diversity of charter school board memberships – teachers, parents, community leaders, and volunteers – heightens the importance of consistent expectations and development activities.

The authorizer regularly monitors the performance quality of the school board based on authorizer observations; interviews with the director, board and faculty; and the review of school policies, reports and board meeting minutes. A school must have a governance model that provides quality oversight by ensuring that there are checks and balances between the board and the school administrators.

A school board is responsible for developing, implementing, and assessing policy; defining sound employee relations; conducting open meetings; recognizing and conforming to the legal mandates imposed by state and federal laws; and governing within the limits of a delegation of state authority – as a nonprofit and public-school board. Additionally, the board has an obligation to assess its successes and failures; inform the public of all deliberations and decisions; promote accountability; enhance public understanding of its mission; conform to standards of ethical behavior; provide a framework for setting goals; and develop strategic plans for the accomplishment of those goals.

The VOA-MN Charter School Authorizing Program publishes annually a School Board Governance Report on their network of authorized charter schools. The purpose of this report is to be a single annual source on the board operations

and compliance of the eighteen VOA-MN- authorized charter schools. Authorizer VOA-MN also observes a minimum of two school board meetings annually.

The VOA-MN determined school board governance standards contained below are uniform for all VOA-MN charter schools. The standards are contained in VOA-MN Charter Contract Addendum B (School Accountability and Authorizer Oversight System) and serve as the basis for both annual authorizer monitoring of school board performance and contract renewal determinations. The authorizer will monitor school performance meeting these standards on an ongoing basis and the standards will be evaluated in the annual VOA-MN Network Governance Report. The standards also serve as the criteria for contract renewal determinations.

VOA-MN's school board governance standards are scored below.

### Board Structure and Development

<b>BLUFFVIEW MONESSORI SCHOOL BOARD ROSTER</b> 2021-2022 Election date: May 2022							
<b>Board Member Name</b>	<b>Seat Type</b> teacher/commu- nity/parent	<b>Officer / Member</b>	<b>Area(s) of Expertise</b>	<b>Elected (E) or Ap- pointed (A) &amp; Date</b>	<b>Month Seated</b>	<b>Term Expiration</b>	<b>Completed Required Training Y/N</b>
Meghan Booth	Teacher	Board Secretary		E	7/1/20	6/2023	
Ann-Marie Dunbar	Parent	Board Vice Chair		E	7/1/17	6/2023	
Crystal Hegge	Parent	Board Member		E	7/1/21	6/2024	
Shelly Merchlewitz	Teacher	Board Treasurer		E	7/1/20	6/2023	
Katie Kinneberg	Teacher	Board Chair		E	7/1/16	Resigned 7/2022	
Mariah White	Teacher	Board Member		E	7/1/21	6/2024	
Daniel Kirk	Community	Board Member		E	7/1/20	Resigned 5/4/22	

<b>Governance Standard 1</b> - The Board of Directors met its governance model requirements laid out in its bylaws and membership requirements as required by Minnesota Statute*.	
<b>X</b>	<b>2: Meets</b> - The Board structure meets bylaws and state statute.
	<b>1: Partially Meets</b> - The Board did not meet requirements for the entire fiscal year.
	<b>0: Does Not Meet</b> - The Board's structure does not meet bylaws and/or state statute.
<b>Data Source:</b> School Annual Report, School Website, Bylaws	
<b>Analysis:</b> The School met this standard. The Board structure meets bylaws and state statute.	

<b>Governance Standard 2</b> - The Board of Directors has the necessary knowledge to fulfill the responsibilities contained in Minn Stat 124E.07, Subd. 6. (Duties), including knowledge in finance/budget, policy/legal, personnel/employment, and education.	
<b>X</b>	<b>2: Meets</b> - The Board has a plan with evidence of training consistent with the plan to ensure members have the necessary knowledge in the areas of finance/budget, policy/legal, personnel/employment, and education.
	<b>1: Partially Meets</b> - The board has a plan but is unable to provide evidence of completion of board member training to ensure members have the necessary knowledge in the areas of finance/budget, policy/legal, personnel/employment, and education.
	<b>0: Does Not Meet</b> - The Board does not implement a plan to ensure Board members have the necessary knowledge.
<b>Data Source:</b> Board Development and/or Board Training Plan and/or Training Table or Calendar, Board Development Committee Minutes, Board Minutes, Annual Report, School Website	

**Analysis:** The School met this standard. The Board utilizes regular Board meeting agendas to monitor and ensure members have the necessary knowledge in key areas and they also documented the knowledge gained by members in their annual report.

**Governance Standard 3** - The board adheres to an orientation process for bringing on new members.

<b>X</b>	<b>2: Meets</b> - The Board adheres to a thorough process for the orientation of new board members.
	<b>1: Partially Meets</b> - The Board has a process for the orientation of new board members, but it is not consistently followed.
	<b>0: Does Not Meet</b> - The Board does not have a membership orientation process for new board members.
<b>Data Source:</b> Board Minutes, Interview, Board Development Plan and/or Board Training Plan, Interview	
<b>Analysis:</b> The School met this standard. Board orientation was conducted on October 19, 2021.	

**Governance Standard 4** - The Board of Directors complies with initial and ongoing training requirements set forth in Minn. Stat 124E.07, Subd 7 (Training): governance, financial, and employment policies and practices.

<b>X</b>	<b>2: Meets</b> - All Board members comply with Minnesota law regarding board training requirements.
	<b>1: Partially Meets</b> - One Board member did not fully comply with Minnesota law regarding board training requirements and was removed.
	<b>0: Does Not Meet</b> - More than one Board member did not fully comply with Minnesota law regarding board training requirements.
<b>Data Source:</b> Annual Report, School Website, Board Minutes and Documents	
<b>Analysis:</b> The School met this standard. The School provided a table clearly documenting that all Board members met annual training requirements in the annual report,	

**Governance Standard 5** - The Board of Directors completes a self-evaluation each year.

<b>X</b>	<b>2: Meets</b> - The Board completes a formal self-evaluation each year.
	<b>1: Partially Meets</b> - The Board competes informal self-evaluations during one or more board meeting(s).
	<b>0: Does Not Meet</b> - board does not self-evaluation
<b>Data Source:</b> Board Minutes, Board Development Committee Minutes	
<b>Analysis:</b> The School met this standard. The Board completed the self-evaluation after the March of 2022 Board meeting via google forms.	

**Governance Standard 6** - The Board of Directors will comply with MN Open Meeting Law, Chapter 13D, and maintain a quorum for all board meetings.

<b>X</b>	<b>2: Meets</b> - The Board has no infractions of MN Open Meeting Law.
	<b>1: Partially Meets</b> - The Board has 1 infraction of MN Open Meeting Law.
	<b>0: Does Not Meet</b> - The Board has 2 or more infractions of MN Open Meeting Law.
<b>Data Source:</b> Monthly Logs of Meeting Minutes, Meeting Minutes, Interview	
<b>Analysis:</b> The School met this standard. The Board had no infractions of MN Open Meeting Law.	

**Governance Standard 7** - The board regularly reviews, updates, and approves its bylaws. The bylaws are consistent with state law.

<b>X</b>	<b>2: Meets</b> - Bylaws are consistent with state law and the board reviews them regularly.
	<b>1: Partially Meets</b> - Bylaws are consistent with state statute but are not reviewed regularly.
	<b>0: Does Not Meet</b> - Bylaws are inconsistent with state statute.
<b>Data Source:</b> School Website, Board Minutes, Bylaws, Interview	
<b>Analysis:</b> The School met this standard. The Board reviewed bylaws at the July and October Board meetings.	

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<b>Governance Standard 8</b> - The Board of Directors adheres to board member election requirements set forth by state statute*.	
<b>X</b>	<b>2: Meets</b> - All requirements were met.
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - Election requirements were not met.
<b>Data Source:</b> Board Minutes, Bylaws, Board Policies, Interview	
<b>Analysis:</b> The School met this standard. The Board election was held on a day while School was in session and there was more than 30-day's notice.	

<b>Governance Standard 9</b> - The Board conducts an annual evaluation (including all aspects of the position description) of the performance of the school leader through a defined annual evaluation process.	
<b>X</b>	<b>2: Meets</b> - The Board completed a formal evaluation of the school leader including all aspects of the job description.
	<b>1: Partially Meets</b> - The Board completed an evaluation of the school leader but not on all aspects of the job description.
	<b>0: Does Not Meet</b> - The Board did not complete an annual evaluation of the school leader.
<b>Data Source:</b> Annual Report, Board Minutes, Committee Minutes, Board Documentation	
<b>Analysis:</b> The School met this standard. The evaluation was completed at the June Board meeting.	

<b>Governance Standard 10</b> - The Board has a board-approved professional development plan for the school director (if applicable as required by Minn. Stat. 124E.12, Subd. 2*).	
<b>X</b>	<b>2: Meets</b> - A professional development plan for the non-licensed individual(s) was documented in the School's Annual Report or the School's Director holds an administrative license.
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - A professional development plan for the non-licensed individual(s) was not documented in the School's Annual Report.
<b>Data Source:</b> Annual Report, Board Minutes, Board Chair Communication.	
<b>Analysis:</b> The School meets this standard. The Bluffview Montessori Board approved a Professional Development Plan (PDP) for the Head of School.	

<b>Governance Standard 11</b> - The Board of Directors monitors the organization's adherence to school board policies.	
<b>X</b>	<b>2: Meets</b> - Meeting minutes include three or more examples of the Board monitoring the organization's adherence to school board policies.
	<b>1: Partially Meets</b> - Meeting minutes includes one or two examples of the Board monitoring the organization's adherence to school board policies.
	<b>0: Does Not Meet</b> - Meeting minutes include no evidence of the Board monitoring the organization's adherence to school board policies.
<b>Data Source:</b> Board Meeting Minutes, Interview	
<b>Analysis:</b> The School met this standard. The Board utilizes policies and monitors the application of policies in its work throughout the year that impact School finances, administrative functions, School governance, and operations.	

<b>Governance Standard 12</b> - The Board of Directors complies with Federal data practices law and the Minnesota Data Practices Act (Minn. Stat. Chapter 13)*.	
<b>X</b>	<b>2: Meets</b> - The board has required Data Practice policies with evidence that they are implemented in accordance with federal data practices law and the Minnesota Data Practices Act. There is evidence that

	board and faculty are trained in Data Practices. There were zero incidents of not following data practice policies.
	<b>1: Partially Meets</b> -The board has required Data Practice policies with evidence that they are implemented in accordance with federal data practices law and the Minnesota Data Practices Act. There is evidence that board and faculty are trained in Data Practices. There was one incident of noncompliance with federal data practices law and the Minnesota Data Practices Act
	<b>0: Does Not Meet</b> - The board does not have one or more required Data Practice policies in place and/or there was insufficient evidence that board and faculty are trained in Data Practices. There have been two or more incidences of noncompliance with federal data practices law and the Minnesota Data Practices Act.
<b>Data Source:</b> Board Minutes, VOA-MN Visit Review	
<b>Analysis:</b> The School met this standard. The Board works to comply with the Minnesota Data Practices Act in several ways.	

<b>Governance Standard 13</b> - The Board of Directors provides ongoing oversight of school academic performance.	
<b>X</b>	<b>2: Meets</b> - Meeting minutes include evidence of regular oversight of school academic performance.
	<b>1: Partially Meets</b> - At least half of the Board meeting minutes include evidence of oversight of school academic performance.
	<b>0: Does Not Meet</b> - Less than half of the Board meeting minutes or less include evidence of oversight of school academic performance.
<b>Data Source:</b> Board Meeting Minutes	
<b>Analysis:</b> The School met this standard. The Board monitors academic performance at meetings as an agenda item, as part of reviewing information found in the Board Packet, or as part of the Principal's Report.	

<b>Governance Standard 14</b> - The school maintains a high level of parent, teacher and student satisfaction rates based on school conducted surveys and student/faculty retention rates.	
<b>X</b>	<b>2: Meets</b> - All of the following criteria are met: high levels of satisfaction of parent satisfaction is based on survey results of over 80%; high levels of student satisfaction based on achieving over 80% retention rates; and high levels of teacher satisfaction based on achieving over 80% staff retention rates.
	<b>1: Partially Meets</b> - Two of three criteria are met: high levels of satisfaction of parent satisfaction is based on survey results of over 80%; high levels of student satisfaction based on achieving over 80% retention rates; and high levels of teacher satisfaction based on achieving over 80% staff retention rates.
	<b>0: Does Not Meet</b> - Less than two of three criteria are met: high levels of satisfaction of parent satisfaction is based on survey results of over 80%; high levels of student satisfaction based on achieving over 80% retention rates; and high levels of teacher satisfaction based on achieving over 80% staff retention rates.
<b>Data Source:</b> School Annual Report, Board Minutes, School Data, Interview	
<b>Analysis:</b> The School met this standard. The School provided data in the School's annual report that the teacher satisfaction rate was 93.1% and the teacher retention rate was 88%, the student retention rate was 90%, and the parent satisfaction rate was 94%.	

<b>Governance Standard 15</b> - Board documents are distributed to all board members at least 3 days prior to a board meeting.	
<b>X</b>	<b>2: Meets</b> - Board documents were distributed to all Board members at least 3 days prior to each board meeting.
	<b>1: Partially Meets</b> - Board documents were not distributed to all Board members one or two times.
	<b>0: Does Not Meet</b> - Board documents were not distributed to all Board members three or more times.
<b>Data Source:</b> Monthly Board Minute Review Logs, Board Chair Statement	
<b>Analysis:</b> The School met this standard as the School Director indicated that Board members always had access to packets 3 days prior to all Board meetings.	



<b>Governance Standard 16</b> - The Board of Directors maintains a Board Documents Binder which includes meeting minutes, bylaws and articles of incorporation and financial statements; and statutory requirements for posting board related information on the school's website*.	
<b>X</b>	<b>2: Meets</b> - A complete Board Documents Binder is kept includes meeting minutes, bylaws and articles of incorporation and financial statements; and the school's website includes the statutory requirements for posting board-related information.
	<b>1: Partially Meets</b> - Complete information is available both in a binder and on the school's website; but there are 1-2 incidents of minutes not being posted after board approval.
	<b>0: Does Not Meet</b> - Information is incomplete in the binder or on the school's website.
<b>Data Source:</b> School Website	
<b>Analysis:</b> The School met this standard. The Board has a Documents Binder which includes meeting minutes, bylaws and articles of incorporation and financial statements located in the School office records room for public access and all Board members have digital access to it. Links to necessary policies and documents are on the School's website.	

<b>Governance Standard 17</b> - The board has a policy review calendar and reviews and updates its policies as needed or required by state law.	
<b>X</b>	<b>2: Meets</b> - The Board has a thorough policy review calendar/plan and review policies as a regular component of regular board meetings.
	<b>1: Partially Meets</b> - The Board has a policy review calendar/plan and reviews policies at half or fewer of the regular board meetings.
	<b>0: Does Not Meet</b> - The Board does not have a calendar/plan for policy review and/or reviews policies at half or fewer of the regular meetings.
<b>Data Source:</b> School Website, Annual Report, Board Minute Review Log, Board Minutes, VOA Visit Review, Governance Committee Minutes, Interview	
<b>Analysis:</b> The School met this standard. The Board has a process for reviewing policies as evidenced by policy reviews and revisions noted in meeting minutes.	

## ○ SECTION PART TWO: SCHOOL MANAGEMENT AND OPERATIONS

Effective day-to-day operations of a charter school support the Learning Program. A well-run school provides an environment in which staff and students can perform at the highest possible level and more effectively reach the school's goals. Management and operations of the school will be monitored and reported by the authorizer using the Formal Site Visit Rubric. The standards also serve as the criteria for contract renewal determinations. The authorizer reserves the right to have flexibility to reasonably amend these standards /expectations as needed (example: based on cell size being to small). One sample rating scale is imbedded below to provide the reader with context.

Authorizer standards for school management and operations are scored below.

<b>M/O Standard 1</b> - 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.	
<b>X</b>	<b>2: Meets</b> - 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.
	<b>1: Partially Meets</b> - 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.
	<b>0: Does Not Meet</b> - Mission and vision are not used to guide school's decision-making.
<b>Data Source:</b> Annual school site visits, annual submission calendar document review, discussions with school leadership. Mission/vision are posted around school grounds. Mission/vision are on all presentation slide decks for families and all staff meeting agendas, and the classroom layouts with Montessori didactic materials are all built around Vision/Mision.	

**Analysis:** Bluffview is all things Montessori from facility design to grade structure, classroom layout and learning environment.

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

**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.

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

<b>X</b>	<b>2: Meets</b> - The school has a plan for Service Learning that connects classroom learning with real life lessons that come through service.
	<b>1: Partially Meets</b> - The school has a service-learning plan, but without evidence of a connection between the plan and service activities.
	<b>0: Does Not Meet</b> - 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:** The school has adopted a Service-Learning Plan and it is linked to the WBWF/Annual Report and annual goals. The students and faculty are engaged in service-learning projects both within the school and in the community.

**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).

<b>X</b>	<b>2: Meets</b> - The school can provide evidence that it complies with health and safety requirements for public schools.
	<b>1: Partially Meets</b> - The school is making progress approaching standard.
	<b>0: Does Not Meet</b> - 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:** 2022-2023 faculty have received required training on health and safety procedures.   X   Yes        No

List of 2022-2023 health and safety related professional development training topics (PD online through Infinites and online powerpoints and other videos with corresponding quizzes to verify completion:

<https://www.bluffviewmontessori.org/staff/teacher-staff-trainings/>

Suicide prevention, 504, Bloodborne Pathogens, McKinney Vento, Anti-harassment, Mandated Reporting, Bullying, Concussions and Head Trauma, Crisis Management, Managing Good Allergies, Child Nutrition, Offer Vs Serve, Test Monitor Training (*also relevant to II, B, 6*)

HVED PD sessions: Positive Behavior Management, and Modifications, Accommodations, and Adaptations (each for 1 CEU our for relicensure)

School complies with MS 121A.035 – Crisis Management Policy.   X   Yes        No Policy #806 - Crisis Management Policy

Number of fire drills completed 2021-2022 school year   5  . (req. five annually)

Number of lockdown/safety drills completed 2021-2022 school year   5  . (req. five annually)

Number of tornado drills completed 2021-2022 school year   1  . (req. one annually)

Number of bus evacuation drills completed 2021-2022 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.   X   Yes        No

Authorizer verified that each classroom and shared spaces contain evacuation plans and each classroom contained the emergency procedure manual.

Authorizer representative verified that the school maintains an emergency drill log   X  

Location of emergency drill log Public Posting Board in Main Office

School complies with MS 299F.47 - School Inspections.   X   Yes        No

Date of most recent facility inspection by fire department:   10/07/2021   (must be a minimum of every three years)

School maintains a log of all visitors.   X   Yes        No      Location of visitor log:   Front Office  

School complies with MS 144.29 Health Records; Children of School Age.   X   Yes        No

Responsible employee: School Employee - School Administrative Assistant Position

School complies with MS 121A.15 - Health Standards; Immunizations; School Children.   X   Yes        No

Designated responsible employee (collection): School Employee - School Administrative Assistant Position

School Nurse and License Number (filing and entering data): Jennifer Warner (Winona Health)

License # # 1279704 , exp 5/31/22 Frequency of school visits: Generally weekly on Thursdays

School complies with MS 121A.22 – Administration of Drugs and Medicine.   X   Yes        No

Designated responsible health aid/employee: Contracted nurse, Assistant Head of School, School Admin Assistant and School HR Coordinator. All have taken the class “Medication Administration for School Personnel) through MN State Community and Technical College.

School has a designated 504 Coordinator: Yes

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

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

**M/O Standard 4 - The School complies with state and federal data practices and privacy laws (Minn. Stat. Chapter 13 and Family Educational Rights and Privacy Act (FERPA))**

<b>X</b>	<b>2: Meets</b> - There were zero incidents of not following data practice policies.
	<b>1: Partially Meets</b> -There was one incident of noncompliance with federal data practices law and the Minnesota Data Practices Act
	<b>0: Does Not Meet</b> - There have been two or more incidences of noncompliance with federal data practices law and the Minnesota Data Practices Act.

**Data Source:** Board minutes, VOA-MN Visit Review

**Analysis:** The authorizer verifies that the school is compliant with state and federal laws pertaining to data privacy and practices.

School verified that the School has a data retention plan:   X   Yes

Date of board approval?   May 20, 2020   Policy 752 – Data Retention and Destruction

Date of Historical Society Approval: June 12, 2020 verified

School verified that student academic records are filed in a separate locked cabinet. \_\_X\_\_ Yes

Location: Administrative Office

School verified that Student / Employee legal records are filed in a separate locked cabinet. \_\_X\_\_ Yes

Location: There is a separate cabinet designated in the administrative office.

School verified that Student/Employee health records are filed in a separate locked cabinet. \_\_X\_\_ Yes

Location: Health Office

School verified that the school has Tennessee Warnings for both the enrollment and employment process. \_\_X\_\_ Yes

School verified that only designated school employees have access to files containing student/employee records. \_\_X\_\_ Yes

School has a board approved Data Request Policy / Procedures. \_\_X\_\_ Yes        No

School evidence provide for Authorizer Review: Policy 722 Public Data Requests

School verified that the school maintains a detailed register/log of all data requests.        \_\_X\_\_ Yes

“Public Data Request Log Policy 722”

**M/O Standard 5** - 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.

<b>X</b>	<b>2: Meets</b> - 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.
	<b>1: Partially Meets</b> - The school is making progress approaching standard.
	<b>0: Does Not Meet</b> - 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:** The school has two parent teacher/guide conferences per year (spring and fall). Fall open house, back to school BBQ, book fair, parent education nights (hot topic varies), District Advisory Committee, winter bazaar, Montessori Week (including grandparents' day), Read-a-thon participation, concerts, Night of the Arts, May Display Day (E1-E2 academic displays), etc. (Policy 612.1 Development of Parent and Family Engagement - Title required)

**M/O Standard 6** - Evidence suggests that the school-teachers are covering the scope and sequence of the state academic standards and engaging in data-driven decision-making.

<b>X</b>	<b>2: Meets</b> - 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.
	<b>1: Partially Meets</b> - 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.
	<b>0: Does Not Meet</b> - 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.
<b>Data Source:</b> Annual school site visits, annual submission calendar document review, discussions with school leadership	
<b>Analysis:</b> The school maintains a schedule for curriculum alignment review. The school utilizes the Fastbridge screening program to help ensure students are on track meeting state-determined grade level expectations.	
In a public Montessori school it is a mix of planned grade-level instruction and individualized learning. Each teacher maintains a curriculum binder with grade level scope and sequence).	
School has a well-defined plan for ensuring that teachers engage in data-driven instruction to ensure student mastery of state standards. <u>  X  </u> Yes. A description of the school's plan was provided by the school. The plan included benchmark reports through Pearson that break down student performance on the various strands of the MCAs. Montessori guides also do ongoing anecdotal record keeping.	

<b>M/O Standard 7 - The school employs highly qualified, appropriately licensed teachers.</b>	
<b>X</b>	<b>2: Meets</b> - The school provides evidence of exemplary hiring processes that ensure teachers are properly credentialed. There have been no license infractions.
	<b>1: Partially Meets</b> - 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.
	<b>0: Does Not Meet</b> - The school has had multiple license infractions.
<b>Data Source:</b> Annual site visits, annual submission calendar document review, discussions with school leadership	
<b>Analysis:</b> The school submits a faculty roster annually in the fall and the authorizer verifies teacher licensure compliance. Most near all schools are experiencing a teacher shortage, but BMS seems to do an excellent job recruiting highly qualified employees.	

<b>M/O Standard 8 - Criminal background checks are conducted on all persons per the board policy and Minn. Stat. 123B.03, Subd.1.</b>	
<b>X</b>	<b>2: Meets</b> - The school provided evidence that it adheres to statute and policy pertaining to conducting criminal background checks on employees and school volunteers.
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - The school could not provide evidence that it adheres to statute and policy pertaining to conducting criminal background checks on employees and school volunteers.
<b>Data Source:</b> Annual site visits, annual submission calendar document review, discussions with school leadership	
<b>Analysis:</b> It is the responsibility of the school Administrative Assistant Position to manage the background check process consistent with Background Check Policy #404. The school requires a background check at time of employment and 1st volunteer activity and then every two years.	

<b>M/O Standard 9 - The school meets / maintains its enrollment goals.</b>	
<b>X</b>	<b>2: Meets</b> - The school could provide evidence that it is meeting its annual student enrollment goals.
	<b>1: Partially Meets</b> – N/A
	<b>0: Does Not Meet</b> - The school is not meeting its student enrollment goals.
<b>Data Source:</b> Annual site visits, annual submission calendar document review, discussions with school leadership	
<b>Analysis:</b> The school has a history of stable to growing enrollment.	
Number of Students (head count) served in 2022-2023: 249	
Number of students (head count) served in 2021-2022: 244	
Number of students (head count) served in 2020-2021: 233	



Number of students (head count) served in 2019-2020: 241

**M/O Standard 10 - The school institutes a fair and open student admission process that complies with Minnesota law.**

<b>X</b>	<b>2: Meets</b> - The school provides evidence of adherence with state laws and guidelines pertaining to student admission.
	<b>1: Partially Meets</b> - 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.
	<b>0: Does Not Meet</b> - 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:** The school application form and enrollment policy were reviewed and verified to be compliant with state law. A Tennessean Warning was added to the enrollment packet.

**M/O Standard 11 - The school's employment process complies with state and federal law.**

<b>X</b>	<b>2: Meets</b> - The school provides evidence that its employment process complies with state and federal law.
	<b>1: Partially Meets</b> - The school is making progress meeting standard.
	<b>0: Does Not Meet</b> - 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:** The authorizer verified that the school complies with school policies, procedures and state/federal laws pertaining to employment. School employment postings and materials contain the statement that BMS is a equal opportunity employer. The school advertises vacancies internally and on various public sites including school website, Facebook, an email to all families at the school, Handshake (reaches universities), sometime the Post of the Daily News depending on the nature of the spot and the urgency of the need, EdPost via MACS for teacher spots, occasional radio spots, sometimes on Indeed, etc. The school finds the best results are usually the platinum Max Recruit system through the Daily News, which reaches Winona and La Crosse with a big digital network concurrent to newspaper postings.

LIST OF APPLICABLE SCHOOL BOARD POLICIES: 102 Equal Educational Opportunity; 609 Religion; 801 Equal Access to School Facilities. The school's employment materials contain a Tennessean Warning.

School Designated Human Resources Person: HR Coordinator

EEO Grievance Designee: Head of School

School District Human Rights Officer: Assistant Head of School

**M/O Standard 12 - The school has defined job descriptions and defined evaluation process for all personnel.**

<b>X</b>	<b>2: Meets</b> - The school could provide evidence of job descriptions for all employee positions and aligned to an evaluation process.
	<b>1: Partially Meets</b> - The school could provide evidence of job descriptions for most employee positions but did not have a defined evaluation process.
	<b>0: Does Not Meet</b> - 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:** The authorizer verified that all employees have job descriptions, and the school adheres to a process for employee evaluations.

<b>M/O Standard 13</b> - The school complies with IDEA, special education laws and school's TSES plan, including "Child Find." Applicable training is provided to faculty annually.	
<b>X</b>	<b>2: Meets</b> - The school could provide evidence of compliance with IDEA, special education laws and school's TSES plan, including "Child Find."
	<b>1: Partially Meets</b> - 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.
	<b>0: Does Not Meet</b> - The school could not provide evidence of compliance with IDEA, special education laws and school's TSES plan, including "Child Find."
<b>Data Source:</b> School site visits, interviews with school faculty, document review.	
<b>Analysis:</b> The school verified that it has a TSES and provides training to all employees at least annually. BMS has a Special Ed page on their school Website with TSES, Restrictive Procedures Plan: <a href="https://www.bluffviewmontessori.org/discover-bluffview/special-education/">https://www.bluffviewmontessori.org/discover-bluffview/special-education/</a>	
Faculty Training Topic(s): TSES, Child Find, and Restrictive Procedures Manual Training Date: September 19, 2022	

<b>M/O Standard 13</b> - The school is not subject to special education investigations by MDE and is not in Corrective Action.	
<b>X</b>	<b>2: Meets</b> - 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.
	<b>1: Partially Meets</b> - The school has been the subject of MDE investigations with findings. Progress has been observed to resolve findings.
	<b>0: Does Not Meet</b> - The school has been the subject of MDE investigations with findings. Findings have not been resolved.
<b>Data Source:</b> Annual site visits, annual submission calendar document review, discussions with school leadership, MDE communications.	
<b>Analysis:</b> The authorizer verified that the school has not been subject to a special education investigation by MDE and is not in Corrective Action.	

<b>M/O Standard 15</b> - The school is compliant with laws pertaining to special education directors and Advisory Council (SEAC).	
<b>X</b>	<b>2: Meets</b> - The school could provide evidence that it is compliant with laws pertaining to special education directors and Advisor Council (SEAC).
	<b>1: Partially Meets</b> - The school contracts with a special education director but could not provide evidence that it has a SEAC that meets at least annually.
	<b>0: Does Not Meet</b> - The school could not provide evidence that it is compliant with laws pertaining to special education directors and Advisor Council (SEAC).
<b>Data Source:</b> Annual site visits, annual submission calendar document review, discussions with school faculty. Copy of the 2020-2021 HVED/BMS service contract.	
<b>Analysis:</b> The school contracts with the Hiawatha Valley Education District, through which the school has been assigned licensed special education director Tracy Tweeten-Lind. Phone: 507-459-0576 Email: <a href="mailto:ttweeten-lind@hved.org">ttweeten-lind@hved.org</a> Special Education Director License Number: #446246  HVED cooperative manages the SEAC for all member schools. The school provides notification of HVED SEAC meetings to the parents of BMS special education students and HVED maintains a copy of SEAC meeting agendas and minutes. Recent previous SEAC meeting dates: Monday, January 29, 2024 Monday, July 31, 2023 Monday, January 30, 2023 Monday, August 29, 2022 <a href="https://www.hved6013.org/page/3282">https://www.hved6013.org/page/3282</a>	

**SECTION TOTAL:** 15/15 Standards Met    0/15 Standards Partially Met    0 /15 Standards Not Met

**Legal and Contractual Compliance** - Charter schools are required to follow many state and federal laws pertaining to all public schools and are expected to uphold all provisions of the charter school contract. VOA-MN expects compliance with legal and contractual obligations. Each VOA-MN authorized charter school shall maintain a Compliance Binder on site that includes VOA-MN defined evidence of compliance with state and federal statutes organized in the manner prescribed by VOA-MN. Additionally, VOA-MN authorized charter schools shall submit information to the authorizer in accordance with the VOA-MN prescribed Annual Submission Calendar. The management and operations of the school will be monitored by the authorizer and reported in the Formal Site Visit Report and additionally as needed. This section is not scored individually. The compliance binder and submission calendar are systems for ongoing monitoring of school performance and compliance and compliance requirements are imbedded in previous sections.

### CONTRACT RENEWAL CALCULATION

VOA-MN schools must achieve at least a Satisfactory Rating (70% of points possible) in the Performance Framework overall and meet the majority of standards in each performance area (Academic, Financial, Organizational Performance) to be eligible for a three-year contract renewal and at least an Exemplary Rating (80% of points possible) in the Performance Framework overall and meet the majority of standards in each performance area to be eligible for a five-year contract renewal. All contract renewals will be for either three or five years. Fewer than three years does not provide enough information on which to make a renewal decision.

2021-2022 SCHOOL YEAR PERFORMANCE (FY22)						
<b>Academic Standards Point Total: 12 out of 4</b>						
<b>Financial Management Point Total: 20 out of 20</b>						
<b>Board Governance Point Total: 34 out of 34</b>						
<b>School Management and Operations: 30 out of 30</b>						
	Meets Standard Points	Partially Meets Standard Points	Does Not Meet Standard Points	Total Points	Weight	Percent
<b>Academic</b>	10	2	0	12 out of 14	.50	43%
<b>Finance</b>	20	0	0	20 out of 20	.20	20%
<b>Governance</b>	34	0	0	34 out of 34	.15	15%
<b>Mgmt/Operations</b>	30	0	0	30 out of 30	.15	15%
<b>Grand Total</b>	94	2	0	96 out of 98	1.00	93%

CONTRACT RENEWAL CALCULATIONS TABLE						
Charter Contract Term: July 1, 2021 – June 30, 2026						
		YR 1 Rating FY22	YR 2 Rating FY23	YR 3 Rating FY24	YR 4 Rating FY25	Average Rating
<b>ACADEMIC (50%)</b>		43%	%	%	%	43%
<b>FINANCE (20%)</b>		20%	%	%	%	20%
<b>ORGANIZATION (30%)</b>						
	BOARD GOVERNANCE (15%)	15%	%	%	%	15%
	MANAGEMENT OPERATIONS (15%)	15%	%	%	%	15%
	<b>TOTAL</b>	93%	%	%	%	93%
<b>CUMULATIVE AVERAGE 93%</b>						

#### CONTACT INFORMATION:

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