



BALL STATE UNIVERSITY

Office of Charter Schools

Geist Montessori Academy

2021-22 Charter Renewal Application

September 30, 2021

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INTRODUCTION

According to Indiana law, a charter school is established to provide innovative and autonomous programs that: 1) serve the different learning styles and needs of public school students; 2) offer public school students appropriate and innovative choices; 3) provide varied opportunities for professional educators; 4) allow public schools freedom and flexibility in exchange for exceptional levels of accountability; and 5) provide parents, students, community members, and local entities with an expanded opportunity for involvement in the public school system (IC 20-24-2-1). As an authorizer of charter schools, Ball State University is responsible for ensuring that its charter schools demonstrate that they are achieving academic, financial, and organizational outcomes.

Merit-based renewal decisions will be based on an analysis of a comprehensive body of objective evidence defined by the Performance Frameworks and gauged under standards developed under national principles and standards for quality authorizing. Renewals will be granted to each charter school that can demonstrate that it has achieved ongoing and continuous performance standards as stipulated in the Performance Frameworks (developed by OCS), and has been faithful to the terms of the contract and applicable laws.

The renewal process serves three purposes. First, it forms OCS' decision on whether to renew a school's contract by providing evidence of school performance in relation to the academic, financial, and organizational performance standards set out in the school's charter and in the Performance Frameworks. Second, the process through the renewal application provides the school a meaningful opportunity to present additional evidence regarding its performance. Third, it provides the school with an opportunity to outline – based on its past performance – a deliberate plan for sustaining success, addressing areas requiring improvement, and ensuring ongoing viability of the school.

RENEWAL TIMELINE

Renewal Orientation: Meetings with School Leaders and Board Members July – August 2021

Letter of Intent to Renew due to OCS on or before October 1, 2021

Renewal Application Due to OCS October 1, 2021

Onsite School Visits.....June – December 2021

Renewal Decisions..... On or before March 1, 2022

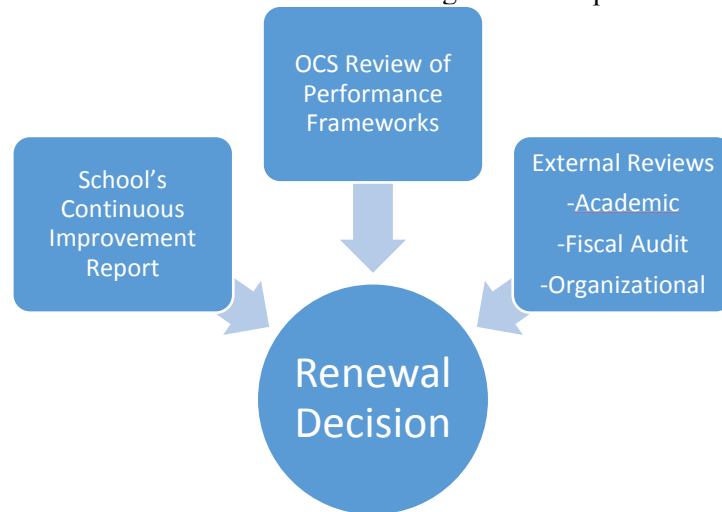
Contract Finalization..... March-June 2022

RENEWAL DECISION OVERVIEW

OCS intends to conduct a rigorous, transparent renewal decision process that leads to merit-based decisions consistent with national principles and standards for quality authorizing. In OCS's process to make changes to its accountability framework and to align its processes with national principles and standards for quality authorizing, the Performance Frameworks and OCS's Policy for School Assessment and Intervention will both be used to determine a school's eligibility for a charter renewal. OCS will base its renewal decisions on the existing record of school performance including, but not limited to, the school's written response to the Renewal Narrative of the Charter Renewal Application and any additional performance data provided by the school.

The renewal process is the culmination of a continuous improvement process, and includes analysis by the school, by OCS and external reviewers. The Renewal Application provides schools an opportunity to present the record of performance and to outline plans for the school's next charter term. Within the report, schools will have an opportunity to comment on the data and provide factual corrections and/or supplement the record with information and data to explain academic results and demonstrate other academic measures that may provide evidence of the school's academic success and/or improvement (*e.g.*, individual student growth data, legacy/cohort group data, summer remediation and/or additional IREAD scores, etc.). The school's plans for the next charter term may affect the length of the renewal term/extension and may shape the development of a new charter contract.

External reviews may be conducted of the academic and organizational performance of schools. All schoo



ls are required to complete a fiscal audit. OCS staff reviews the school's application, external reviewer reports, and our staff analysis to determine renewal decisions.

The Executive Director of the Office of Charter Schools will issue notice of the University's intent to extend or renew the school's charter and the duration of the renewal or extension.

2020-21 CHARTER RENEWAL APPLICATION – INSTRUCTIONS AND CSAPPHIRE SUBMISSIONS

INSTRUCTIONS:

Once completed, the Charter Renewal Applications must be submitted to OCS **electronically through CSAPPHIRE no later than October 1, 2021.**

FORMAT FOR SUBMISSIONS:

- The Renewal Narrative should not exceed 25 pages, excluding attachments.
- Attachments to the Renewal Narrative (excluding the required CSAPPHIRE submissions and updates listed below) should not exceed 25 pages and should be **clearly** referenced in the Renewal Narrative.
- Any attachment should provide information that a) meaningfully augments the body of evidence that OCS has already collected on the school’s performance, or b) illustrates or supports plans or strategies for the next charter term that would be material to the charter contract for the renewal term (*e.g.*, revised student handbook provisions, updated professional development plan, etc.).

CSAPPHIRE SUBMISSIONS AND UPDATES:

The following documents will be reviewed and verified by the OCS remotely through CSAPPHIRE during the renewal process. In order to make the process more efficient, please review and/or upload the school’s *most current* version of each of the following documents. If any of these documents was submitted previously, please just be certain that the version in CSAPPHIRE is the most current version.

School Documents

Please review and verify the following in CSAPPHIRE are the most current version. If such document listed below is not in CSAPPHIRE, please upload the required document. These documents can be found under the “Plans and Policies” folder unless otherwise indicated.

- Curriculum and Instructional Methods
- General Descriptions of Responsibilities of Teachers and Staff
- Methods of Promoting Parent and Community Involvement Practices
- Methods of Pupil Assessments
- Organizational Chart (updated administrative organizational chart)
- School Calendar (current school year) (**annual folder titled “School Calendar”**)
- Staffing Matrix
- Supplemental Programs (Information on Current Student Clubs, Organizations, and Other Extracurricular Activities Offered (including athletic teams))

Current School Plans and Policies

Please review and verify the following “Plans and Policies” in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- Conflict of Interest Policy
- Criminal Background Check Policy
- Deposit of Funds Policy
- Discipline Policy

- Elementary School Reading Plan
- Fundraising Policy and Guidelines
- Graduation Requirements, including diploma types offered (if applicable)
- Medication Policy
- Performance Evaluation Plan for Administrators and Teachers
- Personnel Plan, including Methods of Selection, Retention and Compensation of Employees
- Plan and Programs for At Risk and Special Populations (*In addition to ELL students, special populations and at-risk students includes, but is not limited to, students (i) from economically disadvantaged families, (ii) who are homeless, (iii) in the foster care system, (iv) from single parent homes, (v) at-risk of academic failure, (vi) with a history of a drug or alcohol problems, (vii) that are pregnant or are parents, (viii) have previously come into contact with the juvenile justice system, (ix) are at least one (1) year behind the expected grade level for the age of the student; (x) is a gang member, (xi) has dropped out of school or (xi) satisfies the definition of chronic absenteeism as defined in IC 20-20-8-8*)
- Policy and Procedures for Special Education
- Professional Development Methods
- Promotion/Retention Policy
- School Admission Policy
- School Safety and Emergency Preparedness Plan
- Social Media Policy
- Staff Handbook
- Student Handbook
- Student Health Screening Policy
- Student Records Policy
- Teacher and Staff Compensation and Benefits Plans
- Transportation Policy (if applicable)

Corporate Documents

Please review and verify the following documents in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- Articles of Incorporation (and any Amendments thereto)
- Any Fictitious Name Registrations filed with the Indiana Secretary of State
- Board By-Laws
- Board Member List (including Current Contact Information)
- Calendar of Board Meetings
- ESP Agreement (together with all Amendments thereto, if applicable)

Financials and Budgets

Please review and verify the following documents in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- School's Budgets for 2020-21 and 2021-22
- School's Audit (if not conducted by Donovan CPAs) for the school years ended 6/30/2020 and 6/30/2021 (if not conducted by CliftonLarsonAllen)

Board – Agenda and Minutes

Please review and verify the following documents in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- Board Minutes approving School’s Budgets for 2020-2021 and 2021-2022

Insurance

Please review and verify the following documents in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- Certificate of Liability Insurance
- Evidence of Property Insurance

Facility Documents

Please review and verify the following documents in CSAPPHIRE are the most current versions. If such document listed below is not in CSAPPHIRE, please upload the required document.

- Lease Agreement(s) or Deed(s) for All Occupied Facilities
- Certificate of Occupancy issued by the Indiana Department of Health

RENEWAL NARRATIVE

RENEWAL NARRATIVE

I. Enrollment Diagnostic

Provide the enrollment and demographic information for the current school year.

2021-22 ENROLLMENT & DEMOGRAPHIC INFORMATION		
	#	%
Total Enrollment	221	
# of Students on Waiting List	N/A	
Gender		
Male	130	58.82
Female	91	41.18
Ethnicity/Race		
White	165	74.66
Black	39	17.65
Hispanic	3	1.36
Asian	11	4.97
Native American	3	1.36
Other	0	0
Special Populations		
Students with IEPs	29	0.13
English Language Learners	3	0.01
Homeless Students	0	0%
Eligible for Free and Reduced Lunch	N/A	N/A

Provide enrollment information for length of current charter contract (ADM count).

	2017-18	2018-19	2019-20	2020-21	2021-22
Total Student Enrollment	385	401	384	263	221

Provide the student attendance information for the length of the charter contract.

	Year 1	Year 2	Year 3	Year 4	Year 5
Grade	2017-18	2018-19	2019-20	2020-21	2021-22
K	48	36	49	40	49
1	43	57	37	41	30
2	40	40	52	37	26
3	46	45	31	36	24
4	47	48	34	20	26
5	34	44	44	23	14
6	46	36	42	31	19
7	32	35	31	23	14
8	26	26	30	12	18
9	N/A	N/A	N/A	N/A	N/A
10	N/A	N/A	N/A	N/A	N/A
11	N/A	N/A	N/A	N/A	N/A
12	N/A	N/A	N/A	N/A	N/A
All Grades	385	401	384	263	221

Provide the number and percentage of students eligible for special education by eligibility category for the length of the current charter contract based on each school year's December 1 count.

	Year 1		Year 2		Year 3		Year 4		Year 5	
	2017-18		2018-19		2019-20		2020-21		2021-22	
	#	%	#	%	#	%	#	%	#	%
Autism Spectrum Disorder	17	23%	11	15%	7	11%	4	9%	3	10%
Blind or Low Vision	0	0%	0	0%	0	0%	0	0%	0	0%
Cognitive Disability	6	8%	6	85%	3	5%	3	6%	2	6%
Deaf or Hard of Hearing	0	0%	0	0%	0	0%	0	0%	0	0%
Deaf-Blind	0	0%	0	0%	0	0%	0	0%	0	0%
Development Delay (early childhood)	0	0%	0	0%	2	3%	4	9%	2	6%
Emotional Disability	1	1%	1	1%	4	6%	3	6%	2	6%
Language or Speech Impairment	8	11%	9	13%	7	11%	7	16%	3	10%
Multiple Disabilities	0	0%	0	0%	1	2%	0	0%	0	0%
Orthopedic Impairment	1	1%	2	3%	1	2%	0	0%	0	0%
Specific Learning Disability	30	41%	28	39%	24	38%	12	28%	11	38%
Traumatic Brain Injury	0	0%	0	0%	1	2%	0	0%	0	0%
Other Health Impairment	10	14%	14	20%	13	21%	10	23%	6	21%

Provide the number and percentage of ELL students for length of the current charter contract.

ELL STUDENT POPULATION CHART									
Year 1		Year 2		Year 3		Year 4		Year 5	
2017-18		2018-19		2019-20		2020-21		2021-22	
#	%	#	%	#	%	#	%	#	%
12	3%	8	2%	9	2%	3	1%	3	1%

Provide the number and percentage of homeless students for length of current charter contract.

HOMELESS STUDENT POPULATION									
Year 1		Year 2		Year 3		Year 4		Year 5	
2017-18		2018-19		2019-20		2020-21		2021-22	
#	%	#	%	#	%	#	%	#	%
0	0	0	0	0	0	0	0	0	0

Provide the number and percentage of High Ability students for length of current charter contract.

HIGH ABILITY STUDENTS									
Year 1		Year 2		Year 3		Year 4		Year 5	
2017-18		2018-19		2019-20		2020-21		2021-22	
#	%	#	%	#	%	#	%	#	%
44	12%	54	15%	82	24%	35	13%	24	11%

Enrollment Projections for the next 5 years

Academic Year	Planned Number of Students	Maximum Number of Students	Grade Levels Served
2022-23	275	400	K-8
2023-24	300	400	K-8
2024-25	325	400	K-8
2025-26	375	400	K-8
2026-27	400	400	K-8
At Capacity (specify year)	2026-27	400	K-8

Optional narrative about your Enrollment Diagnostic

II. Executive Summary

A. School and Community Overview

1. Briefly describe the community/communities the school serves and explain how the school's mission and model is meeting identified community needs. Describe the needs-based rationale for focusing on the targeted student population.

Geist Montessori Academy (GMA) serves students in kindergarten through eighth grade as a part of our tuition-free public charter. Additionally, we have a tuition-based pre-k program that is under the GMA leadership umbrella. This program was previously under separate leadership - with its own Board of Directors and leadership; but was recently absorbed by the larger school entity. This will allow us to foster this program and develop it into a true feeder program for our K-8 public charter.

GMA is geographically situated within the Mount Vernon Community School

Corporation's boundaries. We are located less than a mile from both the Hamilton Southeastern School District and Metropolitan School District of Lawrence Township. All three of these districts offer high quality, very traditional public education to our community. GMA exists to offer a high quality, tuition-free, public, Montessori education option to our community. Families come to us seeking an alternative to the traditional public school instructional model which consists of largely whole group instruction in a skill and drill approach. GMA families appreciate our focus on whole child development, hands-on, inquiry based learning, and real life application of academic content through meaningful projects and service opportunities. In our Montessori learning environment our students are able to learn at their own pace, which often translates to accelerated learning for many of our students.

Families are drawn to GMA because our school community is much smaller than the surrounding schools in large districts. At GMA, each student is known and valued as a unique individual learner; whereas in the larger schools they come from they may have been just a number. Parents and students alike have expressed their gratitude and appreciation for our extremely personal approach to building our school community and meeting the needs of each and every student in our care. At GMA, we offer a truly individualized education to every child that comes through our doors.

2. *Describe the school's size, community/communities, location, and changes it has experienced over the last charter term. Include demographic and socio-economic changes about the students, staff, and community at large.*

Geist Montessori Academy is located in northern Hancock County and serves families from more than ten central Indiana school districts. We are fortunate to have a beautiful, brand new building on several acres of land in a prime location for facility expansion and increased enrollment. At this time, we have one tuition-based pre-k classroom, two full day kindergarten classrooms, two lower elementary classrooms (grades 1 & 2), two middle elementary classrooms (grades 3 & 4), one upper elementary classroom (grades 5 & 6), and two middle school classrooms (grades 7 & 8). Since the last charter term we have improved instructional programming in our special area department as we now have fully licensed teachers in P.E. and Music. We are also able to offer Art class as a special area rotation and plan to expand to offer a Computer Science class for students in grades 3-8 second semester this year.

GMA has experienced many changes over the last charter term. We moved into our brand new building in January 2020 and then schools were closed in March 2020 due to the COVID-19 pandemic. Difficulties with changes in school leadership, combining two campuses under one roof in a new location, and the uncertainty of a pandemic created a "perfect storm" scenario in which many people found themselves looking for something different. In the midst of this "perfect storm" our enrollment has declined and our staff size has decreased. This also impacted our staff, causing a significant turnover for our school. We now have new school leadership in place that is working diligently to first bring stability and a strong sense of community to GMA with improved communication and transparency. Then, the focus can shift from stability to

growth for our school community.

Our Fall 2021 enrollment count was 223 students, which is down from 271 in Fall 2020. In our new location, our school is much more visible to the local community and we have seen an increased interest in our school from the surrounding neighborhoods. This increased visibility has also helped to diversify our school community as more and more families from various cultural backgrounds see our beautiful school campus and inquire about enrollment.

Our tuition-based pre-k program, which was formerly its own separate entity entirely, is now under the leadership umbrella of GMA. This has already proven to be beneficial to our K-8 public charter as families enrolling for pre-k are eager to ensure that their child will have a spot for kindergarten. It is our desire to grow and develop our early childhood program so that we are able to retain families and continue to grow our school from the youngest students up. This strategy will also allow for a more intentional Montessori approach to instruction at all levels as more and more students will remain at GMA from pre-k/kindergarten through eighth grade; which provides a greater number of students to form a core Montessori classroom around from year to year.

3. *Provide an overview of the key design elements and how the school implements these elements, including; primary instruction methods, assessment practices, and essential features of the model.*

Our beautiful new school building and sprawling campus property are perfect for incorporating care for the environment into our instruction as a key element of a Montessori education. Our school was previously divided between two campuses - one small school-house building and a renovated storage unit facility. While these spaces were used to their fullest potential, neither offered the same access and opportunities that our new location provides.

In our new building, three classrooms are designated as early childhood or kindergarten learning environments. These classrooms all have their own restrooms and sink/counter spaces. The rest of the classrooms in the new building are large, open spaces with ample natural light and child sized furnishings. The physical design of our classrooms enables our teachers to provide small group instruction in accordance with our Montessori philosophy. Students learn to be self-directed and independently choose their works based on the individualized lessons they have received. Assessment is ongoing through formative and summative assessments that our teachers use to inform instruction. Every classroom has an observation window located in a shared storage closet space located between classrooms. These observation windows allow for current and prospective families to observe our learning environments without interrupting students during lessons or work cycle times.

We are most excited about the potential for our outdoor spaces at our new location. Not only do we have a thriving, protected creek that runs along the north side of our parking lot; but we also have a large open field space that spans four acres on the other side of that creek. Our students are able to access this

shallow creek under the direct supervision of teachers to collect water samples for observation under microscopes and monitor the growth of native flora and fauna in the established ecosystem. Once we are able to install the bridge necessary to access the open field, students will be able to utilize this area for large group games during P.E. class. Additionally, our Building and Grounds Committee is developing plans for how to best use this space to engage with our community through playgrounds, community gardens, nature trails, and much more.

4. *Describe any anticipated changes to the essential terms of the school's educational program, program as described in the current charter. Essential terms are those included, either directly or by incorporation, in the school's existing charter contract that relate to its educational program, including but not limited to the school's mission, course of study, instructional program, grade levels served, and, if applicable, any mission-specific goals. Discuss any associated challenges or risks to these changes.*

At this time the Geist Montessori Academy School Board of Directors and the Executive Director do not have plans to change the schools mission or the current charter. We want to stabilize our school community and move forward toward growth and renewed focus on the mission and vision that our school was founded upon. We are committed to our Montessori best practices, philosophy, and instruction.

B. Goals and Plans

1. *State and provide an overview of the charter school's future goals. Summarize the plans for accomplishing these goals (e.g. academic benchmarks, organizational changes, facility improvements, financial stability).*

Goal 1: Geist Montessori Academy will integrate Montessori curriculum into the Indiana State Standards framework that will maximize individual potential and growth for all students.

GMA will guide each student towards developing into well-rounded, conscientious, curious, inventive, thoughtful, globally aware, productive citizens through a robust curriculum. GMA will incorporate Maria Montessori's Cosmic Education, which will integrate science, math, history, geography, art, writing, reading, and music in each of its academically rigorous lessons, to provide meaningful and challenging experiential learning opportunities for its students. Faculty will guide students' natural curiosity in order to achieve a life-long love of learning guided by the needs of the whole child in a prepared environment using Montessori materials. Additionally, GMA will utilize Project Lead the Way as a curriculum and instructional model to effectively combine our Montessori philosophy with standards-based curriculum. All of our lead teachers will be certified in Project Lead the Way and students in pre-k through eighth grade will engage in this inquiry-based STEM curriculum.

Faculty will follow the individual needs of children and each other while taking into account the needs of the whole community. Parents will be educated on the principles and application of the Montessori Method, integrated into the educational process of their children, and invested in the principles of Montessori and their children's education. In order to create a peaceful community, GMA will consciously teach students to be peaceful problem solvers. GMA will

develop a school-wide SEL program using a House System as the foundation to foster a stronger sense of community across the building.

Classes will continue to be structured around a multi-age model as best as can be accommodated and in accordance with the children's planes of development; offering students natural mentorship opportunities while building a community within the classroom. At the completion of each school year, all students will demonstrate increasing levels of respect for self and others, concentration, motivation, self-reliance, compassion, and discipline. At least 60% of students achieve or exceed target growth in Reading as measured by NWEA. At least 60% of students achieve or exceed target growth in Math as measured by NWEA. GMA will develop and implement a plan to reduce chronic absenteeism. GMA will provide coaching opportunities that will assist teachers in integrating the Montessori philosophy by using the Montessori materials in the classroom.

Goal 2: The philosophy of Maria Montessori and the school's mission will be the cornerstones of the educational programs at GMA while complying with the requirements of the Indiana Department of education and the Ball State Office of Charter Schools.

100% of all administrators and lead teachers will hold a Montessori certification from an approved Montessori training program or will be enrolled in an approved Montessori teacher training program within one year of being hired. GMA will use the alignment of the Montessori curriculum to the Indiana State Standards as a guide to ensure students are prepared for state-required assessments and have a vertically aligned curriculum. GMA will establish baseline data at the beginning of each year for each student. Each spring, 60% of students will achieve or exceed their target growth in Reading as measured by NWEA. Each spring, 60% of students will achieve or exceed target growth in Math as measured by NWEA. GMA will use assessments to monitor student growth and inform instruction. GMA will continuously be committed to implementing the Montessori curriculum with integrity.

Goal 3: Parents and teachers will form effective partnerships to support students becoming life-long learners.

GMA staff will respect parents' diverse backgrounds and experiences. Parents will be informed about the principles and applications of the Montessori Method through Family Engagement Nights, social media, classroom communications, and our improved school newsletter - The GMA Gazette.

2. *Summarize plans for addressing any past academic, organizational, or financial deficits.*

General Disbursements - Vouchers will be created for all invoices and signed off on by the Business Office (or designee) and Registrar. Vouchers and invoices will be sent to Bookkeeping Plus for disbursement to vendors. The Board has created a process of oversight to govern approval for any payments over \$3000. Completed vouchers, invoices, and check stubs will be kept on file in the Business Office in vendor files.

Credit card - With the addition of new staff members in recent months to cover responsibilities in our Business Office we will be able to ensure timely payments.

We will have an internal calendar to track due dates of payments. A system of checks and balances will be implemented so that an individual separate from the cardholder will be responsible for reconciling receipts and credit card statements. Additionally, we will implement a process of printing and filing all credit card receipts by month.

ADM Testing - With expanded use of the Student Information System, PowerSchool, we will be better equipped to manage student enrollment. The documents required for enrollment are: birth certificate, proof of residency, student information/health form, and a student services history. Our school registrar will be responsible for providing families with appropriate enrollment information and processing enrollment applications. Before a student begins classes at GMA, an administrator will review and verify that all enrollment forms have been received.

Payroll Policies and Procedures - All GMA employee contracts will be reviewed by HR and Administration in July to ensure accuracy of pay rates and benefits packages. New hire onboarding to include review of contract and benefits, rate of pay, receipt of staff handbook, as well as distribution of keys, building fob, and technology agreement will be completed prior to the first day of employment by HR or a representative of the Administration. Additionally, all contracts will be presented to the Board for approval prior to employee onboarding.

General Receipts - A new policy regarding cash transactions will guide protocols for handling such matters at GMA. All staff members will be required to use an established Google Sheets tracking system to document receipt of cash or check payments for various student activities in the classroom setting. This includes, but is not limited to, collection of funds for field trips, class parties, and other special events. Staff will record the date of the transaction, name of the student, amount received, and check numbers (if applicable) on a Google Sheet shared between the staff member and the Business Office. All money collected by staff members will be turned into the Business Office the same day it is collected. No money will be kept overnight in classrooms. Before the funds are accepted by the Business Office, all amounts will be verified by both the staff member collecting the funds and either the Business Office or Registrar. Each will retain a copy of the receipt verifying the amount collected. All monies received by the Business Office will be deposited within 24 hours of receipt.

Form 9 - We believe that our third-party partnership with Bookkeeping Plus will provide ample support and accountability to ensure timely completion of Form 9. This is already evidenced by the on-time submission of Form 9 for January 2021

III. Student Performance Diagnostic

2. Academic Performance Framework

1. *Describe indicators that show a positive and negative trend in performance.*

We have seen a positive trend in student performance on IREAD-3 over the last four years. As recently as 2017 GMA fell into the category of “Needs Improvement”, but has consistently remained in the “Meets Standard” category since 2018.

Another positive trend during this charter term was improvement in the area of

student growth in Math from the 2016-2017 school year through the 2019 school year.

There is much work to be done to improve student performance on state assessments. GMA has consistently fallen into categories indicating a need for improvement in the areas ELA and Math proficiency on state assessments for students in grades 3-8.

2. *If academic performance has resulted in a rating of 'Falls Far Below' on any Quality indicator in the Ball State Academic Framework during the charter term, please provide the school's assessment of those results and describe changes being made to address any deficiencies.*

With regard to students in grades 3-8 achieving proficiency in ELA and Math on state assessments, we have been rated "Falls Far Below" for five consecutive years in Math and four out of five years in ELA. To address these deficiencies, we have already begun implementing the EngageNY curriculums for ELA and will soon begin to supplement our Montessori curriculum in Math with this standards-based curriculum. We believe that supplementing the Montessori curriculum with this rigorous, standards-based program that has been proven effective in other schools like ours, will help to create a bridge between the Montessori approach to instruction and learning and the accountability of the state's standardized tests.

Our Special Education programming and performance has been another area that has fallen far below the standard for students achieving proficiency in ELA and Math on state assessments. Over the last several months we have created an organized system for RTI processes and provided professional development training for all teachers and staff. This training included data collection, instructional strategies to support struggling learners, and questions to ask when determining next steps in the RTI process. There has never been a consistent, formal RTI process in place at GMA; and we believe that this change in organization and a systematic approach to addressing deficiencies will prove effective over time.

3. *Provide any academic performance-related evidence, supplemental data, or contextual information that may not be captured in academic framework.*

The COVID-19 pandemic has had significant impacts on student learning and performance. The 2018-2019 school year was the last "normal" year for schools, which means that our students in kindergarten through second grade have never experienced a "normal" school year; and students in third grade have only had their kindergarten year as "normal". This drastic disruption to the learning environment is unprecedented in our time and will take several years to recover. Students and staff alike have experienced the stresses of inconsistency in the delivery of instruction from in-person to fully virtual and hybrid at times due to the pandemic. Students are reporting increased anxiety about being in social settings with peers, which has led to a greater emphasis on Social Emotional Learning and needs of students. Sensory sensitivities to sound and light, decreased focus and attention spans, and a lack of appropriate responses to social interaction are all things that we have observed in recent months as the majority of our students have returned to in-person learning.

It will take time and intentional efforts to address these needs for our students, but this work must be done well in order to help our students self-regulate and be able to attend to academic tasks.

B. Continuous Improvement Practices

1. *Does the school engage in a systematic, inclusive and comprehensive process to review, revise and communicate the school's mission and design? Please describe this process, and when it last occurred, or is planned.*

Since March 2021 a group of stakeholders including a Board member, school leadership, staff, parents, and students has been engaged in a comprehensive process to review, revise and communicate our mission and design. We have partnered with a parent volunteer who owns an award-winning marketing firm in Indianapolis to rebrand our school and communicate our mission and vision with our community. The final products will include a new school logo and website as well as print and marketing materials to use in our efforts to increase student enrollment and build community rapport.

2. *Describe the school's assessment system and how it is used to improve instructional decision-making, support student learning and implement professional development.*

The student assessment system for Geist Montessori Academy is centered around the results of our annual ILEARN and IREAD tests that are administered by the state of Indiana, and our NWEA benchmark assessments. The 3rd-8th grade students take part in our state mandated tests, and that data is collected over the summer to use the following fall if applicable. Through these assessments we are able to gauge where students are academically to better drive instruction, assign RTI and address individual student needs. Data is used to create goals for students and grade levels. Based on observed trends, we can see which areas we need to provide professional development for our staff.

3. *Describe how the school uses other data (qualitative and quantitative) to evaluate the effectiveness of the academic program.*

Our curriculum is based on traditional Montessori lessons and practices. Our teachers use Montessori methods and best practices to teach to the whole child, which focuses on meeting their individual needs through differentiated hands-on instruction. Normed assessment data such as NWEA, ILEARN, and IREAD-3 help us ensure that our informal classroom assessment processes are preparing students for academic success. The students play a big part in guiding the direction of the curriculum, but if assessment data indicates a need, our teachers are able to identify and respond appropriately with modifications to the lessons presented and works offered to each individual student.

Our recently implemented RTI process is streamlined and organized so that all teachers are able to access the resources and support that individual students need. As a full-inclusion model for Special Education services, our staff is equipped to address deficits in student learning in the general education classroom. When additional support is required, students are provided small group instruction in the Resource Room with a trained staff member using research-based best practices and programs such as guided reading, Leveled Literacy Intervention, Lexia, and more.

4. *Describe how the school leadership implements a continuous improvement process that provides clear direction for improving student learning.*

School leadership meticulously goes through all of our student NWEA data after each benchmark in the Fall and Winter. We analyze all the test scores to look for trends, areas of strength, and weakness for each teacher. We then take our findings and we share that information with each teacher to help them see those same trends. We then continue our walkthroughs and classroom observations to ensure that the proper steps are being taken to put those ideas and suggestions into place. This allows us to continuously improve our classroom instruction.

5. *Describe how leadership and staff supervision and evaluation processes have resulted in improved professional practice and student success.*

Staff supervision and evaluations are a vital part of our student success. School leadership uses Standard for Success as their supervision and evaluation tool. Using a modified RISE 2.0 rubric, school administration conducts informal and formal observations at least once a semester. During all forms of observation, our teachers are rated on a wide variety of standards and sub standards as highly effective, effective, improvement necessary, and ineffective. Following all observations, school leaders meet with individual teachers to discuss their observation, their rating in each area, and a plan for improving any areas that were rated as improvement necessary or ineffective. This ensures that our teachers can make adjustments if necessary, and continue to grow as educators.

Geist Montessori uses the Teacher Appreciation Grant to provide our teachers with additional funds based on their evaluation. If they are rated as highly effective or effective they are eligible for a bonus the following school year. This incentive has been communicated to our staff, and they know that it is available to them. With this extra incentive to achieve high marks, they can be more intentional with their growth and development as a teacher.

All of these policies and procedures work together to ensure that our staff are properly supervised and evaluated each year. This has produced motivated teachers that are held responsible for their student performance, and their professional practices. We have observed some wonderful teaching practices that have delivered high student performance. We have also used these methods to identify underperforming teachers, and been able to put them on a plan for successful growth and development.

C. Needs of Learners

1. *Describe the systems in place to monitor the progress of individual students and facilitate communication between interventionists, classroom teachers and parents regarding the needs of individual students.*

The system in place to monitor the progress of our students and facilitate communication between pertinent stakeholders is a multi-facilitated approach. We use a combination of observation and anecdotal notes from each teacher, data from NWEA, and examples of actual student work to determine the performance and growth of each individual student. Our teachers use all of this information to plan and prepare traditional Montessori lessons for their students. Each grade level follows a set scope and sequence, and an individual student's performance level determines what lessons they are ready to

learn. Their performance on each lesson determines how quickly they are able to move on to the next lesson in the sequence.

We triangulate the data by starting with administrative data meetings to analyze the performance and growth of individual students, and entire classrooms as a whole. We look for patterns, trends, and any surprises that would indicate great growth or decline. Based on these findings, we investigate further to look at students in individual classrooms to identify any students that may qualify for High Ability, or are in need of RTI.

2. *Explain how the school supports diverse learners.*

Geist Montessori Academy supports diverse learners by delivering instruction that is tailored to each learner's individual academic needs. Each teacher uses a combination of observation and anecdotal notes, data from NWEA, and examples of actual student work to determine the performance and growth of each individual student. Our teachers use this information to plan and prepare traditional Montessori lessons for their students. Each grade level follows a set scope and sequence, and an individual student's performance level will determine what lessons they are ready to learn. Their performance on each lesson determines how quickly they are able to move on to the next lesson in the sequence. The goal for every student is to have the opportunity to participate in every lesson in the sequence, by the time they move on to the next grade level.

3. *Which subgroup(s) show a trend toward increasing performance, and which toward decreasing performance? Please support with data.*

The data is inconsistent at best over the last few school years due to changes in the state's assessments, the COVID-19 pandemic, and inconsistent learning environments fluctuating between virtual and in-person instruction. Additionally, because our sample size for students in ethnic minority groups is so small, the data collection is unreliable.

What we have seen historically in terms of achievement by gender continues to be true. Male students slightly outperform females in Math, except in our Middle School classes. Female students continue to score slightly higher than their male counterparts in Reading.

4. *Describe persistent or closing achievement gaps between demographic groups, and strategies being used to address those needs. Please support with data.*

We will continue to use a targeted, tiered approach to instruction and RTI. We will rely on data from state assessments and NWEA, anecdotal records, and teacher observations to provide all students with an intentional, individualized educational experience as we move toward our goals of academic growth and achievement for all students.

Optional Student Performance Attachments.

III. Stakeholder Diagnostic

Recommended surveys to complete this diagnostic: Climate and Culture Surveys for Students and Parents, with option of customized questions

A. *Which area(s) indicate the overall highest and lowest levels of satisfaction?*

Stakeholders were invited to participate in a satisfaction survey in February 2021. Responses were varied, but some trends were identified. Overall, parents were very satisfied with the quality of teachers and staff, strong school community, and small family-like atmosphere at GMA. Some areas that were identified as opportunities for improvement were staff retention and Montessori certification for teachers, smaller class sizes, and strong, supportive school leadership and Board members.

1. Which of the above reported findings are consistent with findings from other sources (e.g. surveys, observations, anecdotal, third party reviews), please explain.

The Board of Directors contracted with a local HR firm early in 2021 to evaluate school leadership. Staff members were anonymously surveyed to evaluate the effectiveness of the school leadership at that time. The findings of that third-party review also support the stakeholder survey results that indicated improvements needed in the area of leadership, consistency, and communication.

2. What are the implications and/or challenges related to any negative stakeholder perceptions?

The implications and challenges related to negative stakeholder perceptions are many. First, our school has seen a significant decline in enrollment over the last couple of years as many longtime GMA families have chosen to go elsewhere due to the staffing and leadership challenges that GMA has experienced. A decline in enrollment also means a decrease in state funding, which impacts the school budget and resources. This has been especially challenging in a pandemic when resources are already stretched thin. Current school leadership is committed to rebuilding trust amongst stakeholders as we work to move GMA forward toward excellence.

Secondly, the lack of systems, organization, and research-based best practices over the last couple of years has led to significant dissatisfaction amongst stakeholders who desire strong communication and consistency as well as academic outcomes to indicate success. Current school leadership has been diligently working to implement systems and processes that will support achievement of academic and organizational goals.

Lastly, turnover in our Board of Directors and a perceived lack of transparency has made it difficult for stakeholders to trust leadership in recent years. This has created a vacuum of interest in being involved in the school community as a volunteer for events, PTO, and committees and has placed unnecessary stress on the school administration to bear the burden of repairing the relationships between the school and stakeholder groups. Current school leadership is dedicated to creating a partnership between the school and the Board of Directors to work together for the betterment of the school community as a whole so that our students and families are able to invest their time and energy with us as we move forward.

3. How will survey findings inform school improvement plans? What actionable steps will be taken based on survey results?

Current school leadership has already made changes to address transparency, trust, and communication between the school and stakeholder groups. A revamped school newsletter is sent out via our mass communication system bi-weekly. Many parents have commented that they have appreciated this change and that they feel like they have a better sense of what is going on at school since this change was made.

We have engaged a stakeholder group to address the need for rebranding and reimagining from a marketing perspective so that we can position ourselves strategically in the community and increase enrollment.

We have intentionally set aside recent grant funds to provide teachers with the resources needed to pursue Montessori certification. We currently have a group of teachers starting their journey toward Montessori certification together. Additionally, our Executive Director is completing her certification as a Montessori Administrator and our Assistant Executive Director will begin her training in January. This process and commitment to ensuring our instructional and leadership team is focused on Montessori principles and methods is critical to our success as a tuition-free, public Montessori school.

Optional Stakeholder Diagnostic Attachments.

IV. Organizational and Financial Diagnostic

A. *Organizational*

The OCS will review and verify the organizational documents submitted through CSAPPHIRE during the renewal process (see above for the specific list of required CSAPPHIRE submissions and updates). It is important for each school to upload the school's most recent version of each of the required documents in order for the OCS to make appropriate decisions related to Organizational Performance.

Along with the required CSAPPHIRE submissions, provide any organizational related evidence, supplemental data, or contextual information. Submissions may include evidence of current compliance in areas for which the school was found previously to be non-compliant or other updates relevant to previous school findings.

1. *Provide a reflection of the school's governance and organizational performance over the past charter term. Describe any anticipated changes to the governance and management of the school, including but not limited to:*

- *board composition,*
- *board member roles*
- *member recruitment,*
- *committee structure,*
- *amendments to by-laws,*
- *expected or amended changes to board policies, including but not limited policies to deal with board conflicts of interest and grievances by stakeholders.*

Our school board commonly consists of five to seven members, with continuous member recruitment in place to attempt to maintain that number. Currently, there are five members of the Board of Directors. At all times the board will elect a president, vice president, treasurer, and secretary. All other members are considered members at large. We have had several members of our board come and go during this charter term, with new members commonly serving multiple years and multiple roles. This year, we have three new Board members.

The president oversees the recruitment of new members, but any member can recommend a community member to join the board. After an interview process, they will vote to add the new member at a formal monthly board meeting. Depending on what role each member takes, they will have specific duties that they are responsible to

oversee. When a new committee is started, they will appoint a board member to oversee it, and ensure its success. With regard to anticipated changes in our Board we know that our current treasurer's term will be expiring in December 2021.

2. Please specify whether the board intends to contract or terminate a contract with an education service provider (ESP). YES NO
3. *Describe the current condition of the school's facility, and its capacity to serve students. Discuss any anticipated changes in facilities needs and/or location, which includes any changes to lease terms and/or building plan. If the facility is leased, how does the board oversee the terms of the lease agreement?*

GMA moved into a brand new building on a beautiful campus in January 2020. The new facility is able to accommodate all of our classrooms from Pre-K through 8th grade. Additionally, we have a full size gymnasium and dedicated art and music classrooms.

We have room for expansion of programming on our campus and are excited about creating outdoor learning spaces for students to engage with nature and the environment.

Due to an unforeseen maintenance failure at the beginning of this school year, we are currently restricted to one restroom for student use and one restroom for staff use. We are working with the insurance company to resolve the issue and reconstruct the damaged restrooms to open all of the facilities in the building.

4. *If any organizational deficiencies or findings were noted in any of the annual independent audits, prior notices of deficiencies, onsite reviews, or prior renewal letter, please note such deficiencies and how they were remedied.*

General Disbursements - Vouchers will be created for all invoices and signed off on by the Business Office (or designee) and Registrar. Vouchers and invoices will be sent to Bookkeeping Plus for disbursement to vendors. The Board has created a process of oversight to govern approval for any payments over \$3000. Completed vouchers, invoices, and check stubs will be kept on file in the Business Office in vendor files.

Credit card - With the addition of new staff members in recent months to cover responsibilities in our Business Office we will be able to ensure timely payments. We will have an internal calendar to track due dates of payments. A system of checks and balances will be implemented so that an individual separate from the cardholder will be responsible for reconciling receipts and credit card statements. Additionally, we will implement a process of printing and filing all credit card receipts by month.

ADM Testing - With expanded use of the Student Information System, PowerSchool, we will be better equipped to manage student enrollment. The documents required for enrollment are: birth certificate, proof of residency, student information/health form, and a student services history. Our school registrar will be responsible for providing families with appropriate enrollment information and processing enrollment applications. Before a student begins classes at GMA, an administrator will review and verify that all enrollment forms have been received.

Payroll Policies and Procedures - All GMA employee contracts will be reviewed by HR and Administration in July to ensure accuracy of pay rates and benefits packages. New

hire onboarding to include review of contract and benefits, rate of pay, receipt of staff handbook, as well as distribution of keys, building fob, and technology agreement will be completed prior to the first day of employment by HR or a representative of the Administration. Additionally, all contracts will be presented to the Board for approval prior to employee onboarding.

General Receipts - A new policy regarding cash transactions will guide protocols for handling such matters at GMA. All staff members will be required to use an established Google Sheets tracking system to document receipt of cash or check payments for various student activities in the classroom setting. This includes, but is not limited to, collection of funds for field trips, class parties, and other special events. Staff will record the date of the transaction, name of the student, amount received, and check numbers (if applicable) on a Google Sheet shared between the staff member and the Business Office. All money collected by staff members will be turned into the Business Office the same day it is collected. No money will be kept overnight in classrooms. Before the funds are accepted by the Business Office, all amounts will be verified by both the staff member collecting the funds and either the Business Office or Registrar. Each will retain a copy of the receipt verifying the amount collected. All monies received by the Business Office will be deposited within 24 hours of receipt.

Form 9 - We believe that our third-party partnership with Bookkeeping Plus will provide ample support and accountability to ensure timely completion of Form 9. This is already evidenced by the on-time submission of Form 9 for January 2021.

5. *If applicable: If the school will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events.*

Not applicable

6. *Required: How will the school comply with the McKinney-Vento Act, which requires all public schools to transport homeless students, even if general transportation is not provided?*

Under the McKinney-Vento Act, the means of transportation is not specified, and school districts can choose how to provide transportation, as long as the methods are safe and appropriate. The McKinney-Vento Act requires transportation to and from the school of origin for as long as it is the student's best interest to attend that school, as well as transportation to remove barriers to attendance and participation, as well as any other transportation that is comparable to what housed students receive.

B. Financial

1. *In what ways does the board assure that financial resources provide adequate support for the school's overall program and to improve student achievement? Please reflect on the allocation, challenges, trends and any shifts in resources directed toward Student Academic Achievement, Student Instructional Support, Overhead and Operational, and Nonoperational (See Form 9).*

The board created a finance committee that consists of the board treasurer, representatives from the school that have visibility into school finances, i.e. operations manager, assistant director, and our third party bookkeepers. This committee meets once a month to monitor YTD activity related to cash flows and any major event that has a cost material effect to cash on hand (reserves). It should be noted that other than a mortgage, the school does not carry debt to meet financial obligations. The finance committee creates goals for the school based on

enrollment as it affects the basic grant from the state, pursuance and use of secondary sources of income (grants/donations), and identifies investments in programs that further the school’s strategic plan. The board approves a budget that is based on financial goals established by the finance committee. The board considers the need for a revised budget if enrollment numbers trend downward after the official September ADM count is reported to the state. The board recognizes that enrollment drives the financial health of the school and consistently analyzes factors that contribute to its fluctuation. Recently, the greatest aggravating factor to enrollment has been the Covid-19 pandemic. The school realized a 30% decrease from the onset of Covid-19 and has determined that it will take 2 years to fully recover.

2. *If any financial deficiencies or findings were noted in any of the annual independent audits, prior notices of deficiencies, onsite reviews, or prior renewal letter, please note such deficiencies and how they were remedied.*

The independent audit executed by CLA determined the following:

- a. General receipts testing - (40) general receipts were selected for testing. Of the 40 disbursements selected, the School was unable to provide deposit slips for twenty (20) of the receipts. We were therefore unable to review and determine if they were deposited in a timely manner and if they were deposited in the same form in which they were received.
 - i. The school has a specific individual identified who is responsible for ensuring that all funds are deposited within 24 business hours of receipt
- b. Form 9 - The Form 9 reports filed for December 31, 2019 was not filed until March 30, 2020, but was due February 26, 2020. We recommend that policies and procedures be reviewed and strengthened to ensure the report is able to be filed and certified within the required timeframe.
 - ii. The Form 9 is prepared by our third party bookkeeper. There are consistent office holders at the school to review and sign the documents in a timely manner.

Financial Dashboard

Ball State University
Financial Performance Framework Dashboard

Meets
Does Not Meet
Falls Far Below

1. NEAR TERM INDICATORS			
1.a.	Current Ratio (Working Capital Ratio)	Current Assets divided by Current Liabilities	1.9
1.b.	Cash to Current Liabilities	Cash divided by Current Liabilities	1.73
1.c.	Unrestricted Days Cash	Unrestricted Cash divided by ((Total Expenses- Depreciation Expenses)/365)	87
1.d.	Enrollment Variance	Actual Enrollment divided by Enrollment Projection in Charter School Board-Approved Budget	94%
1.e.	Default		No
2. SUSTAINABILITY INDICATORS			
2.a.	Total Margin	Net Income divided by Total Revenue	5.2%

		Aggregated Total Margin: Total 3 Year Net Income divided by Total 3 Year Revenues	8.9%
2.b.	Debt to Asset Ratio	Total Liabilities divided by Total Assets	0.78
2.c.	Cash Flow	Multi-Year Cash Flow = (Year 3 Total Cash)-(Year 1 Total Cash); One-Year Cash Flow = (Year 2 Total Cash)-(Year 1 Total Cash)	-\$1,535,009
2.d.	Debt Service Coverage Ratio	(Net Income + Depreciation + Interest Expense)/(Annual Principal, Interest, and Lease Payments)	1.07

Financial Performance Framework – Data Points	
Current Assets	\$459,443.60
Current Liabilities	\$95,933.77
Cash	\$401,738.13
Unrestricted Cash	\$309,328.24
Total Expenses	\$2,410,958.44
Depreciation	\$27,055.97
Enrollment Projection in Charter School Board-Approved Budget	
Actual Enrollment	
Default	
Net Income	\$23,469.52
Total Revenue	\$2,461,483.93
Total 3 Year Net Income	\$526,070.52
Total 3 Year Revenues	\$8,281,564.93
Total Liabilities	\$1,595,686.25
Total Assets	\$3,373,979.67
Year 1 Total Cash	\$403,725.00
Year 2 Total Cash	\$891,615.00
Year 3 Total Cash	\$401,738.13
Interest	\$8,571.33
Annual Principal, Interest, and Lease Payments	\$231,770.36

I.