



410 South Commercial Street • Neenah, WI 54956 • Tel: (920) 751-6800 • Fax: (920) 751-6809

To: Dr. Mary Pfeiffer, District Administrator
Board of Education

From: Steve Dreger, ^{SD}Assistant District Administrator of
Learning and Leadership

Date: April 4, 2013

Re: Middle School Charter Planning Grant Application

On March 19, 2013, the Board considered a planning grant application for a project-based charter middle school in the District. The application will be presented to the Board for a vote at the April 9, 2013 Board meeting. With approval at the April 9 meeting, the grant will be submitted to the Wisconsin Department of Public Instruction (DPI) by April 15.

Based on dialog at the March 19 Board meeting, the following minor additions and revisions were made to the application:

- Addition: "The name River Oak was chosen because of the significance of the Fox River and Neenah's Old Council Tree to this area, as well as the symbolism of the native oak tree." (page 1)
- Addition: "Student Achievement Goals - Years 4 and 5 of the Charter: Student achievement goals for years 4 and 5 will be the same as year 3." (page 9)
- Revision: "Exemptions from the lottery shall be granted, in the following order:
 - Siblings of students currently attending River Oak
 - Children of founders of Charter: Catherine Holecko, Jean Maurice Boyer, Jodi Blank, Kara Allen, Kathleen Hallett, Kim Krause, Sonja Rusch, and Tracy Romzek (**these exemptions would total no more than 15 students over 5 years**)
 - Children of River Oak faculty and/or staff (**we anticipate these exemptions will total two or fewer per year**)" (page 15)
- Revision: "Cultural factors, including parents' socioeconomic status and level of education, could be another potential barrier: Efforts will be made to be culturally sensitive, and to reach out to those with different cultural **and at-risk socioeconomic** backgrounds through intentional marketing and through community partnerships." (page 16)
- Addition: Five year budget

Members of the planning team and I will be present at the April 9, 2013 Board meeting to answer any questions you may have about the application.



Planning Grant

I. GENERAL INFORMATION			
1. School District/Chartering Authority Neenah Joint School District		2. Name of District Administrator Dr. Mary Pfeiffer	
3. School District/Chartering Authority Address <i>Street, City, State, ZIP</i> 410 S. Commercial St., Neenah, WI 54956			4. CESA No. 06
6. District Administrator E-Mail Address mpfeiffer@neenah.k12.wi.us			5. LEA Code
8. If Multi-District, list district names			7. District Administrator Phone <i>Area/No.</i> (920) 751-6800 x 105
10. Name of Charter School River Oak Middle School		9. Charter School Operated by CESA No	
11. Charter School Address <i>Street, City, State, ZIP</i> to be determined		13. Developer/Planning Committee Representative Phone <i>Area/No.</i> (920) 720-9094	
12. Charter School Developer/Planning Committee Representative Kathleen Hallett			15. Amount Requested \$225,000
14. Developer/Planning Committee Representative E-Mail Address kmahallett@gmail.com			

II. ASSURANCES

Each participating subgrant recipient does hereby agree to comply with the following assurances: *Read and check*

- Subgrant funds will be expended during the specified subgrant period; the school district or chartering authority shall serve as the fiscal agent for all subgrants; standard accounting procedures will be utilized by subgrant recipients and records of all subgrant expenditures will be maintained in an accurate, thorough, and complete manner. Any administrative fees or expenses reserved from the subgrant are prohibited unless agreed to by the chartering authority and subgrantee as noted in section 5204(f) (4) (B) of the ESEA Part B Public Charter Schools.
- Subgrant recipients/chartering authorities by endorsement of this proposal, assure that an application to develop and operate a charter school has been submitted to the authorizer. Both parties assure the application for federal charter school funds has been submitted to the authorizer in an adequate and timely manner.
- Subgrant recipients will participate in all data reporting and evaluation activities or on-site monitoring as requested by the U.S. Department of Education and the Wisconsin Department of Public Instruction, including the School Performance Report, participation at a reporting conference, a final grant report document, and financial claim.
- Subgrant recipients will expend planning funds only for the purpose of planning a charter school which is nonsectarian and which will be in compliance with all Wisconsin laws and administrative rules regarding staff certification and licensure.
- Subgrant recipients will comply with all provisions of all applicable acts, regulations and federal laws including, but not limited by enumeration to, the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and part B of the Individuals With Disabilities Education Act, and all provisions of the Department of Education General Administrative Regulations (EDGAR), 34 CFR, Parts 76, 77, 80, 81, 85, 97, 98, and 99.
- Subgrant recipients will comply with all provisions of the *Non-Regulatory Guidance—Public Charter Schools Program* of the United States Department of Education <http://www.ed.gov/policy/elsec/quid/cspguidance03.pdf>.
- Subgrant recipients ensure that the charter school will receive funds through programs administered by the United States Department of Education under which funds are allocated on a formula basis. Each charter school will receive such funds for which it is eligible.

III. SIGNATURES

WE, THE UNDERSIGNED, CERTIFY that the information provided in the application is true and correct to the best of our knowledge.

Signature of District Administrator/Chartering Authority Official

Date Signed *Mo./Day/Yr.*



Signature of Charter School Planning Committee Representative

Date Signed *Mo./Day/Yr.*



REQUIRED

IV. CERTIFICATION AND ENTITLEMENT

REQUIRED

Agencies receiving funds under any of the grant programs must collect this certificate whenever they enter into a covered transaction with a grantee. (Refer to instructions for more information.)

Certification Regarding

Debarment, Suspension, Ineligibility, and Voluntary Exclusion

Lower Tier Covered Transactions

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 34 CFR Part 85, Section 85.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, *Federal Register* (pages 19160-19211). Copies of the regulations may be obtained by contacting the person to whom this proposal is submitted.

1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

LEA / Agency /Company Name

Neenah Joint School District

Name and Title of Authorized Representative

Signature



Date Signed *Mo./Day/Yr.*

INSTRUCTIONS FOR CERTIFICATION

1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion-Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Non-procurement List (202-786-0688).
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

V. CHARTER SCHOOL INFORMATION		
1. Name of Charter School River Oak Middle School	2. Public School Conversion No	
3. Will your charter school be a virtual charter school as defined under Section 115.001(16), Wisconsin Statutes? A virtual charter school is a charter school under contract with a school board under s. 118.40 in which all or a portion of the instruction is provided through means of the internet, and the pupils enrolled in and instructional staff employed by the school are geographically remote from each other. No		
4. Type of School Instrumentality	5. Grade Level(s) to be Served by Charter School Grades 6 th -8 th	6. Projected Enrollment Upon Opening 100
7. Primary Type of Students Served All Student Types	8. Primary Educational Model Project-based Learning (PBL) If Other, Specify	9. Curricular Priority Liberal Arts (traditional curriculum courses) If Other, Specify
10. School Leadership Model <i>See Instructions</i>		
a. Will your charter school share space with another public school? Unknown	b. Will your charter school be led by a principal? Yes	c. Will your charter school be a teacher-led school? No
11. Lead Teacher First & Last Name <i>If known</i>	12. Lead Teacher Email Address	13. Lead Teacher Phone Area/No.

14. Secondary School Delivery Model <i>See instructions</i> Interdisciplinary Collaboration If Other, Specify	15. Date Charter to be Granted <i>Mo./Day/Yr.</i> By 12/1/2013	16. Date Charter School Will Open <i>Mo./Day/Yr.</i> 9/1/14
17. Charter School Administrator <i>If known</i> Not known at this point	18. Charter School Administrator Phone <i>Area/No.</i>	
19. Charter School Administrator Email Address		

VI. THE PLANNING PROCESS—RECORD OF ACTIVITIES

Provide details on planning activities to date.

Month/Year	Activities
August 2012	<p>This charter planning began in Feb. 2012. Parents Kathleen Hallett, Jodi Blank, Betsy Wilson and Jennie Eastman-Kiesow met to discuss the possibility of planning a charter middle school. Kathleen Hallett held a meeting at her house for parents interested in idea of a charter middle school. Watched and discussed videos and information related to Montessori Middle Schools and place-based pedagogy and project-based learning.</p> <p>April - Continued to meet with interested parents to develop initial ideas and a formal proposal to present to the NJSD Administrators.</p> <p>May - Charter planning group met with Mr. Steve Dreger, Assistant District Administrator of Learning and Leadership and Phil Johnson, principal at Alliance Charter to discuss our initial ideas for a charter school. Met with Toni Hameister, an assistant professor at Marian University who has done research on innovative school programs and discussed ideas with her. Contacted DPI and spoke with Barry Golden about questions related to chartering, planning grant.</p> <p>June - Charter planning group met with Shattuck Middle School administrators (Stephanie Pfernetton and Chad Buboltz) to discuss middle school charter ideas and get their feedback. They were supportive of the idea.</p> <p>July 31 - Open meeting held at the Neenah Public Library and interested parents attended to hear Oliver Schinkton for the OASD discuss project-based learning and the pilot program he and others are starting in 2012-13 for 9th and 10th grade students at Oshkosh North H.S. that will include PBL and an interdisciplinary teaching focus, community focus. After his talk, the charter planning group voted to work to establish a charter middle school in Neenah using project-based learning with a community focus.</p> <p>August 14, 2012 - a formal charter planning board was established with Kathleen Hallett as President and Kim Krause as Vice President and 6 other board members.</p> <p>August 29th the charter planning board met with Dr. Mary Pfeiffer, supintendent of the NJSD and Mr. Steve Dreger, Assistant District Administrator of Learning and Leadership to discuss the plan for a PBL charter school and get their input. They expressed support of the idea and agreed to collaborate with us. They stated that the NJSD and school board definitely has had discussions regarding the positive benefits of having more choices of school programs and charter schools in the district. This has been a part of strategic planning discussions in the district.</p>
September 2012	9/13/12 Meeting of the Charter Planning Board to work on the overall vision of school and start grant narrative.
October 2012	<p>10/5/12 - Created a Prezi presentation on the charter school. 10/9- Met in a special meeting of the NJSD school board, gave a presentation about our proposed middle charter school, followed by questions/discussion with the board. The school board agreed to support our plan to write a planning grant. 10/10/12 Meeting of the Charter Planning Board at NPL for continued planning for grant and planning a visit to the PBL program at Oshkosh North High School. 10/16/13 Charter Planning Board meeting with Steve Dreger, Assistant District Administrator. District will provide funds for school visits, conference attendance for a district staff member, and some costs as they come up for planning purposes.</p>
November 2012	<p>11/2/12 Charter Planning Board meeting. November 8, 2012 - Charter planning board met with the Learning and Leadership team of the NJSD (Anne Pergolski, Lisa Weiss, Sue Nennig, and Steve Dreger) discussing plans for the school, asking questions regarding curriculum, common core, integrated instruction, potential resources. 11/16- Began to draft a vision statement and possible names. 11/15- Visit to ONHS Community School program by 3 planning group members. Observed students giving project presentations. Met with the teachers and discussed key aspects of their school, use of community partners, advisory groups, common planning time, philosophy, obstacles. Very supportive of us and willing to continue to help us in our process.</p>
December 2012	On-going research via the internet on interdisciplinary learning and teaching models, project-based learning research, outcomes.
January 2013	<p>Began grant work in earnest, splitting up some sections of the grant for research and development with Kathleen Hallett leading this effort, Steve Dreger providing input and guidance with meetings on 1/24 and 29 specifically for grant review and writing. School visit to Fox West Academy in Hortonville for the morning on 1/24. Met with staff and administrator there, discussed their PBL program, start-up, professional development, curriculum, scheduling, etc. Very supportive of us and willing to help us in the process, grant writing questions. Shared their planning grant with us. Charter Planning meeting held on 1/16 and 1/31/13 to discuss grant work, development of mission and vision statements, review of Fox West school visit. Contacted James Lewicki, educational consultant, for potential consulting and he agreed. He reviewed the draft of the grant to date and gave suggestions.</p>

VI. THE PLANNING PROCESS—RECORD OF ACTIVITIES
(Cont'd.) See page 10 of grant application, Section III, item 1

Month/Year	Activities
February 2013	Planning meetings and grant work meetings weekly discussing governance, budget, names, professional development, lottery and admissions, special education, goals, curriculum using PBL and ILC design. Set date for meeting with James Lewicki to come to the NJSD to meet with the planning group and with district administrators. Weekly meetings for grant writing work as well. Kara Allen attended the DPI technical assistance meeting in Madison.
March 2013	3/7- meeting with James Lewicki.
April 2013	4/9/13 - NJSD school board meeting voting on planning grant. Submit Planning Grant Application to DPI before April 15. 4/10/13 - 1 planning board member will attend a WISN sponsored session on charter school governance in Oshkosh.

Outline remaining work that needs to be accomplished to open your school and begin serving children by fall 2014.

Month/Year	Activities
May 2013	Involve and engage potential teachers and middle school administrator (s) in the planning process. Explore district resources and expertise for curriculum development, technology, core curricular subjects and integration of those. Work with consultant on preliminary planning of key school design elements.
June 2013	Plan for a formal charter governance board and beginning charter contract planning. Use WISN resources, webinars, area conferences, expertise from other existing schools to help with planning of curriculum and assessment using the PBL and ILC approaches. Research math and Spanish curriculums, science, LA, and social studies curricular-related materials.
July 2013	Work on writing of charter and planning of a non-stock corporation for governance.
August 2013	Hire planning consultant and planning coordinator. Continue writing charter draft.
September 2013	Purchase HD video conference system. Continue writing charter draft. Purchase sample curricula. Begin meetings of River Oak governance board. Hire attorney for advice and review of charter contract. Inform community about proposed charter school.
October 2013	Initial meeting with school board to review early draft of the charter. Revise charter based on discussions with school board. Governance board receives orientation and training.
November 2013	Formal proposal of charter to school board; school board votes to approve charter. Submit articles of incorporation for governance board. Develop promotional materials for prospective families.
December 2013	Develop promotional materials for prospective families. Begin developing school website.
January 2014	Informational sessions for prospective families for fall enrollment. Begin curriculum planning.
February 2014	Informational sessions for prospective families for fall enrollment. Applications for enrollment due from Neenah residents. Curriculum planning continues.
March 2014	Hold lottery for in-district students. Planning team and board, administrators and any staff attend WISN conference. Curriculum planning continues. Begin draft of resource guide, making contacts with potential community partners. Complete design and build of school website.
April 2014	Hire teachers. Curriculum planning continues. Begin development of assessment tools. Work with consultant for curriculum and assessment planning, key aspects of school design. Continue work on community resource guide.

VI. THE PLANNING PROCESS—RECORD OF ACTIVITIES
(Cont'd.) See page 10 of grant application, Section III, item 1

Month/Year	Activities
May 2014	Hold lottery for out-of-district students. Visit another PBL school. Curriculum planning continues. Assessment planning continues. Work and training with consultant continues. Continue work on community resource guide.
June 2014	Staff and administrator(s) attend Buck Institute training. Curriculum planning continues. Purchase curricular materials, classroom furniture, and other supplies. Assessment planning continues. Work and training with consultant continues. Continue work on community resource guide.
July 2014	Curriculum planning continues. Assessment planning continues. Purchase curricular materials, classroom furniture, and other supplies. Staff training in Project Foundry. Work and training with consultant continues. Complete work on community resource guide.
August 2014	Complete curriculum plans for all subject areas, integrated instruction, and schedule. Finalize report card template. Prepare classrooms for students' arrival. Plan and host welcoming event for students and families. Plan PR for opening day. Host students for orientation session(s).

VII-A. LOCAL PLAN FOR USE OF DISCRETIONARY FUNDS See
Completing the Application Narrative, VI. The Budget, item 2


Instruction	Amount	Explanation
Salaries and Fringe Benefits	\$3,876	\$3,876: 36 Days of Substitute teachers to cover: -6 core teachers during 2 2-day visits (24 days) to PBL schools (Note: While the school only needs 4 core teachers in the first year, based on district class size goals, we hope to identify and train all 6 core teachers during the planning year. The costs of training the additional 2 teachers is minimal and is outweighed by the the benefits of shared experience.) -4 core teachers during WISN conference (12 days).
Purchased Services		
Coaches / Consultants		
Others Specify		
Non-Capital Objects <i>Supplies and materials</i>	\$22,000	\$12,000 of furniture selected for optimal collaboration.; \$5,000 of Spanish curriculum materials; \$5,000 of Math curriculum materials.
Capital Objects <i>Equipment</i>		
TOTAL Instruction	\$25,876	
Support Services	Amount	Explanation
Salaries and Fringe Benefits <i>Subs, Extended contracts*</i>	\$61,087	\$13,716: 480 teacher hours to develop Integrated Curriiculum Development for core subjects and interdiciplinary approach; \$12,802: PBL 101 and PBL 201 training through Buck institute for 6 core teachers and 8 specialist teachers; \$10,337: 9 months @ 17 hrs/wk for a Planning coordinator to ensure that details are not neglected and that various efforts remain on track to meet our objectives during the planning year; \$5,144: 180 teacher hours to develop 3 grades of Spanish curriculum; \$5,144: 180 teacher hours to develop 3 grades of Math curriculum; \$4,572: 160 hours (32 hours for 5 specialty areas) to develop Integrated curriculum across supplemental areas (Art, Business & Information Technology, Technology & Engineering, Wellness & Health Education, and Special Education); \$6,858: 240 teacher hours: for research & training of benchmarking across 3 three areas (80 hours): 1) Leadership & Community Building, 2) Technology Inntegration & Assessment, 3) Literacy across the curriculum); \$914: 32 hours for 4 core teachers to receive training on Project Foundry; \$1,143: 40 hours for core teachers to coordinate Partnership with local businesses and organizations; \$457: 16 hours teacher extended time to organize informational meetings for the community.
Purchased Services		

VII-A. LOCAL PLAN FOR USE OF DISCRETIONARY FUNDS (Cont'd.) See
Completing the Application Narrative, VI. The Budget, item 2

Coaches / Consultants	\$40,875	\$21,375 for Consulting services & PBL Training during the planning year, the consultant will assist the team in seeing the big picture, coaching the team through the on-boarding and curriculum creation process; \$13,000 to the Buck Institute Training Fees for 6 core teachers & 8 specialist teachers to spend 4 days to take PBL 101 (\$8,500) and PBL 201 (\$4,500); \$6,500 for workshops, PBL training seminars, and other teacher professional development opportunities.
WISN or Other Network	\$6,750	Annual membership, conference fees (for 4 core teachers), and consulting services to WISN
Other Specify	\$12,891	\$5,591 in travel & lodging expenses for teachers and administrators to visit other PBL schools and attend WISN conference; \$800 Conference fees for 1 administrator to attend WISN conference; \$3500 start-up fee to Project Foundry; \$3,000 fees paid to PBL schools for immersion visits
Non-Capital Objects <i>Supplies and materials</i>	\$40,311	\$26,311: Purchase instructional resources specific to teaching and integrated project-based curriculum including but not limited to:Reference materials on project-based learning, Digital and print resources, Literacy Materials to support Integrated Instruction, STEM - Science lab equipment and materials; \$14,000: Equip classrooms with technology and resources specific to goals of River Oak Middle School. This would include but not limited to:Printers, scanners, laminator, Digital cameras, video camcorders, laptop computers.
Capital Objects	\$15,000	Purchase of HD Video Conference System
TOTAL Support Services	\$176,914	
Support—Administration	Amount	Explanation
Purchased Services	\$21,310	\$7125: Consultant fees to ORIENT and TRAIN Governance Board on planning process, timeline, charter law, and autonomy/accountability measures; \$5000: Legal fees to Draft charter school contract; gain approval of authorizer (School Board); submit to DPI \$5000: Develop promotional materials: Design advertising and marketing materials such as: logo, signs, brochures and website information. \$2400: Conference fees for 3Governance board members to attend WISN conference; \$1785: Travel & lodging expenses for Governance board members to visit PBL schools and travel to WISN conference.
Non-Capital Objects <i>Supplies and materials</i>	\$900	Supplies & materials used to support drafting of charter school contract; gain approval of authorizer (School Board); submit to DPI.
Capital Objects		
TOTAL Support—Administration	\$22,210	
TOTAL BUDGET Phase I and Phase II	\$225,000	

* Applies to payments for additional time beyond contract. Cross reference with five-year budget worksheet A, line 3.

VII-B. BUDGET SUMMARY—PHASE I

Authorizer	Charter School Name	Grant Period Begin	End	Project Number For DPI Use Only
Neenah Joint School District	River Oak Middle School	August 1, 2013	July 31, 2014	
WUFAR Function	WUFAR Object	Phase I Amount		Phase II
Instruction (100 000 Series) Activities dealing directly with the interaction between instructional staff and students.	a. Salaries (100s)			
	b. Fringe Benefits (200s)			
	c. Purchased Services (300s)			
	d. Non-Capital Objects (400s) Supplies & Materials			
	e. Capital Objects (500s) equipment			
	TOTAL Instruction		\$0	
Support Services—Pupil and Instructional Staff Services (in 210 000 and 220 000 Series) Support services are those which facilitate and enhance instructional or other components of the grant. This category includes staff development and supervision.	a. Salaries (100s), extended contracts, subs		\$8,922	
	b. Fringe Benefits (200s)		\$1,276	
	c. Purchased Services (300s)		\$16,500	
	— Purchased Services—WISN (300s)		\$6,750	
	d. Non-Capital Objects (400s) Supplies & Materials		\$0	
	e. Capital Objects (500s) equipment		\$15,000	
	TOTAL Support Services—Pupil/Instructional Staff Services		\$48,448	
Support Services—Administration* (Associated with functions in 230 000 series and above.) Includes general; business; and central service administration.	a. Purchased Services (300s)		\$15,870	
	b. Non-Capital Objects (400s) Supplies & Materials		\$900	
	c. Capital Objects (500s) equipment		\$0	
	TOTAL Support Services—Administration		\$16,770	
Total Phase I Budget	Do not exceed 50% of Total Grant.		\$65,218	
DPI Approval	Signature of DPI Reviewer			Date Signed Mo./Day/Yr.
				

* No LEA may deduct administrative fees from subgrant funds that are not mutually agreed upon and voluntary. Any administrative fees or expenses reserved for the subgrant are prohibited unless agreed to by the chartering authority and the subgrantee [Section 5204(f)(4)(B), NCLB Act 2001]. USDE staff has indicated administrative expenses may not exceed 5 percent of the grant award.

Grant recipients may make budget adjustments up to 10 percent higher or lower in any approved category; changes larger than 10 percent require DPI approval.

Budget Revisions: Submit a copy of this page or PI-9600-B with appropriate revisions included, with justification provided. Submit request at least 30 days prior to expenditure of grant monies.

VII-B. BUDGET SUMMARY—PHASE II

Authorizer	Charter School Name	Grant Period	Project Number
Neenah Joint School District	River Oak Middle School	Begin: August 1, 2013; End: July 31, 2014	For DPI Use Only

WUFAR Function	WUFAR Object	Phase I	Phase II Amount
Instruction (100 000 Series) Activities dealing directly with the interaction between instructional staff and students.	a. Salaries (100s)		\$3,600
	b. Fringe Benefits (200s)		\$276
	c. Purchased Services (300s)		\$0
	d. Non-Capital Objects (400s) Supplies & Materials		\$22,000
	e. Capital Objects (500s) equipment		\$0
	TOTAL Instruction		\$0
Support Services—Pupil and Instructional Staff Services (in 210 000 and 220 000 Series) Support services are those which facilitate and enhance instructional or other components of the grant. This category includes staff development and supervision.	a. Salaries (100s), extended contracts, subs		\$44,522
	b. Fringe Benefits (200s)		\$6,367
	c. Purchased Services (300s)		\$37,266
	d. Non-Capital Objects (400s) Supplies & Materials		\$40,311
	e. Capital Objects (500s) equipment		\$0
	TOTAL Support Services—Pupil/Instructional Staff Services		\$48,448
Support Services—Administration* Associated with functions in 230 000 series and above. Includes general; business; and central service administration.	a. Purchased Services (300s)		\$5,440
	b. Non-Capital Objects (400s) Supplies & Materials		\$0
	c. Capital Objects (500s) equipment		\$0
	TOTAL Support Services—Administration		\$16,770
Total Phase II Budget	Phase I Total	\$65,218	\$159,782

TOTAL BUDGET **\$225,000**

DPI Approval	Signature of DPI Reviewer ➤	Date Signed Mo./Day/Yr.
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* No LEA may deduct administrative fees from subgrant funds that are not mutually agreed upon and voluntary. Any administrative fees or expenses reserved for the subgrant are prohibited unless agreed to by the chartering authority and the subgrantee [Section 5204(f)(4)(B), NCLB Act 2001]. USDE staff has indicated that administrative expenses may not exceed 5 percent of the grant award.

Grant recipients may make budget adjustments up to 10 percent higher or lower in any approved category; changes larger than 10 percent require DPI approval.

Budget Revisions: Submit a copy of this page or PI-9600-B with appropriate revisions included, with justification provided. Submit request at least **30** days p to expenditure of grant monies.

Executive Summary River Oak Middle School

Vision: *Providing our youth with a world class liberal arts education*

Mission: *Empowering learners to engage – with confidence – the complexity and change inherent in our global society.*

River Oak Middle School is a Neenah Joint School District charter school beginning with 100 students in grades 6-8. This innovative liberal arts school shares the NJSD's commitment to academic excellence, but capitalizes on the flexibility of Wisconsin charter school law to provide a new choice for Neenah's middle-school students. The name River Oak was chosen because of the significance of the Fox River and Neenah's Old Council Tree to this area, as well as the symbolism of the native oak tree.

Five defining characteristics drive River Oak's educational program. Students will:

- Become successful contributors to our global society through a strong **liberal arts education**.
- Build and apply their knowledge using a **project-based learning approach**.
- Make meaningful connections and build literacy skills across subject matter through **interdisciplinary studies**.
- Learn in meaningful contexts through **community partnerships**.
- Benefit from **literacy collaboration** across disciplines to close the achievement gap.

River Oak builds a *liberal arts foundation* through *interdisciplinary studies*. Liberal arts studies provide a solid base for future studies in virtually any field. It is an approach to learning that empowers individuals and prepares them to deal with complexity, diversity, and change. It helps students develop a sense of social responsibility, as well as strong and transferable intellectual and practical skills. The intersection of subjects and ideas through integrated instruction brings relevance and fosters motivation and curiosity.

The school's *project-based approach* to learning (PBL) encourages active exploration and authentic problem-solving. Students not only demonstrate their knowledge of a topic, but also apply it with purpose. Each student will act as a thinker, considerate of others, perceptive in knowledge and empathetic in execution.

River Oak's collaborative learning system relies on *partnerships*. Teachers, parents, and community members work together to stimulate students' intellectual curiosity and leadership, emphasizing strong literacy skills. This River Oak mosaic empowers students and prepares them for success in high school and beyond.

River Oak's *literacy collaboration* closes the achievement gap with a focus on development of reading, writing, speaking, listening, and critical thinking skills across all disciplines. Moreover, the use of technology, development of 21st century skills, parent and community involvement, and attention to unique learning styles and different rates of learning will anchor an innovative literacy effort.

River Oak is a dynamic learning community that engages students who learn in different ways. Its authentic, relevant approach captures (or recaptures) a passion for learning in the middle school years.

PLANNING GRANT NARRATIVE SECTION

The Charter School Vision for Innovation

1. Describe the educational vision and philosophy which will drive your charter school planning effort including the underlying theories and research which support that vision.

River Oak Middle School is a 6th-8th grade middle school using project-based learning with a community focus, interdisciplinary teaching, and integration of a liberal arts, standards-based curriculum. We chose the name River Oak because of the significance of the Fox River to this area's history, geography, industry, and people. Oak represents the strong and long-lived oak tree, which is native to this area, and the Old Council Tree that once stood on the shores of the confluence of Lake Winnebago and the Fox River. The Menominee Indians held councils under this tree's sheltering arms prior to the 1830's. The Council Tree serves as the city of Neenah's logo.

Project-based learning (PBL) is an instructional approach in which authentic, active learning experiences engage and motivate students. Projects are based on real challenges, problems or questions; are influenced by student interest and choice; and involve an extended period of inquiry and problem-solving. Students often work in teams and partner with members of the community to help solve problems. They present their results and demonstrate their learning to each other and to the community in a variety of ways. Rigorous projects help students learn key academic content and practice project management skills, such as collaboration, communication and critical thinking (source: Buck Institute, bie.org).

Early adolescence is a critical and unique time of development. Middle school students experience significant physical, cognitive, and emotional changes affecting them academically and socially. Because of these unique needs, River Oak will create a small learning community that supports and nurtures students successfully to navigate these years.

We believe:

Project-based learning and interdisciplinary studies deepen students' understanding and application of knowledge; provide a strong academic foundation; and develop 21st century skills and skills for life.

The Buck Institute, a nonprofit research and consulting group devoted to PBL, has gathered extensive evidence that the instructional strategies and procedures that make up a standards-focused, project-based learning curriculum “are effective in building deep content understanding, raising academic achievement, and encouraging student motivation to learn” (Buck Institute, http://www.bie.org/research/study/does_pbl_work). Research studies have demonstrated that PBL can be more effective than traditional instruction in increasing academic achievement on state standardized tests (Geier, Blumenfeld, Marx, et al., 2008). It has been found to be more effective than traditional instruction for teaching mathematics (Boaler, 1997), as well as economics, science, and social science (Lynch, Kuipers, Pyke, & Szesze, 2005, and Mergendoller, Maxwell, & Bellisimo, 2006).

An article from *Educational Leadership* (Larmer, 2012) supports these findings and makes additional points:

- PBL builds skills in critical thinking, collaboration, communication, and delivering presentations.
- PBL builds the skills required by Common Core Standards, such as how to organize and explain ideas in oral presentations, use visual aids, and speak appropriately in given situations.

In “The Logic of Interdisciplinary Studies” by Sandra Mathison and Melissa Freeman, an in-depth 1997 report, the authors cite broad consensus among researchers on the benefits of interdisciplinary studies. These benefits include increased understanding, retention, and application of general concepts; increased ability to make decisions, think critically and creatively; and promotion of cooperative learning and improved attitude about oneself as a learner and as a meaningful member of a community.

We believe:

Students learn best in environments that facilitate different rates and styles of learning and promote active engagement.

Students bring diverse backgrounds, experiences, abilities, maturity levels, and motivations to the classroom. All have a right to learn and be engaged in the learning process. There is much evidence to support the educational benefits of

differentiated instruction, responding to different learning styles, and promotion of active engagement of learners (Allan & Tomlinson, 2000; Ellis & Worthington, 1994; Vygotsky, 1978). A growing body of research shows positive results for the use of differentiated instruction across a broad range of targeted groups (Rock, Gregg, Ellis, & Gable, 2008, cited from <http://www.ascd.org/publications/educational-leadership/feb10/vol67/num05/Differentiated-Learning.aspx>).

Project-based learning naturally facilitates different learning styles, interests, and ability levels. It provides students with multiple ways to acquire content, to process or make sense of ideas, and to develop products that demonstrate effective learning. Students for whom English is a second language benefit from the sharing of cultural and community connections, and receiving support and assistance from their peers. At-risk students' education is enhanced in a learning environment that is engaging and motivating, and includes a nurturing, smaller learning community. Gifted students are challenged to achieve to their potential without the limitations of a traditional grade-level curriculum. Special-needs students have opportunities to make meaningful contributions and find that their individual differences are accepted. Working in multi-age groups on projects also facilitates peer teaching and social aspects of learning (highly motivating to middle school students), and meets the needs of different learners.

We believe:

Learning is enhanced when students apply their knowledge in a variety of realistic, creative, and constructive ways.

In their books, Geoffrey and Renate Caine have summarized key principles of brain research and how it relates to learning and education. They explain that learning is physiological and the brain changes as a result of active, sensory, engaging, and physical experiences. Retention improves and neural connections are enhanced when students are provided with learning opportunities that incorporate problems, projects and simulations.

We believe:

Helping students develop an understanding of their role in society as they make connections to their larger community, its environment, history, economy, culture, and diversity will increase the relevance of learning and nurture active citizens.

A summary of research on community-based and service learning by Shelley Billig (Phi Delta Kappan, May 2000), states that "middle and high school students who engaged in high-quality service-learning programs showed increases in measures of personal and social responsibility, communication, and sense of educational competence" and that they perceived themselves as being more socially competent. Research cited in "Connecting Communities and Classrooms" by Elaina Loveland (Rural Roots Newsletter, August 2002) also supports this premise.

We believe:

Learning a foreign language is an essential skill for our global society and can be enhanced through an integrated studies approach.

There is solid educational research to support second language study and acquisition. In addition to developing a lifelong ability to communicate with people from other countries and backgrounds, other benefits include improved overall school performance and superior problem-solving skills (Bamford & Mizokawa 1991; Hakuta 1986). The Hispanic population is the largest ethnic minority in the U.S. and in Neenah, thus Spanish language instruction is a relevant choice.

We envision:

The role of a River Oak teacher is to be a facilitator, role model, and nurturer.

The students spend time with their teachers like a family. The advisory group is the multi-age base camp from which the pre-adolescent learner – with changing emotional and social needs – anchors personalized learning experience. Given the advisory group relationship, teachers see themselves as role models and facilitators of the community. Moreover, each teacher loves learning and sharing this learning with students.

We envision:

The role of the student, like the teacher's, is to be challenged, to be a sponge, and love the learning and the joy of learning with others.

- Each student will act and collaborate as an investigator. Imagine students studying the migratory pattern of birds and working with an ornithologist to build several appropriate birdhouses.
- Each student will act and collaborate as a researcher. Imagine students studying bicycle safety in town and presenting their findings to the city council, with recommendations for new signs and safety designations.
- Each student will act in a collaborative as a leader. Imagine every 8th grade student being a mentor to a 6th grade student or a big brother/sister to a 2nd grade student.
- Each student will act as a thinker; considerate of others, perceptive in knowledge, and empathetic in execution. Imagine students reading aloud each Tuesday and Thursday with their favorite elder through the Meals on Wheels program just down the street from the school.
- Each student will be a questioner, concerning himself or herself with knowing more. Imagine students walking along Wisconsin Avenue, looking at historical homes and wondering how they were built and who lived there.
- Each student will be a connector, building a bridge to the community. Imagine students who design, prepare, and cook a lasagna dinner for a local church's free meal program.

a. Describe how the concept of a charter school was introduced. Who introduced the concept and why?

The concept of a charter school was first initiated by parents of students at Neenah's Alliance Charter Elementary School. The idea for a charter middle school grew out of parents' positive experiences with Alliance (a Montessori-based program entering its 10th year as a charter), desire for a charter option at the middle school level, active parental involvement, and parent leadership. After discussions with other interested parents, and having done an interest survey of 40 families a few years ago, the initial planning group felt confident there was a definite interest and need for a charter middle school.

The founding parents had background knowledge of the Montessori philosophy at the middle school level, which is a place-based and project-based approach. The group did additional research into other innovative school programs, particularly project-based and place-based learning. After defining their ideas, goals, purposes, and curriculum plans, the parent group held discussions with Neenah Joint School District administrators and middle school principals. These district representatives expressed their support for the proposal and also supported the need for another middle school choice for families of the more than 1,400 middle school students in the Neenah Joint School District. After additional discussions with educators familiar with PBL, a Charter Planning Board was established in August, 2012. This group has been working in a variety of ways to move the planning forward and is further detailed later in the grant.

b. Include a vision or mission statement.

Vision:

Providing our youth with a world class liberal arts education

Mission:

Empowering learners to engage – confidently -- the complexity and change inherent in our global society.

c. Describe why a charter is needed to achieve the vision. How is the school innovative and unique and how will it differ from the schools now currently available to students in the district? Why can't the vision be accomplished by merely adding a program to the existing offerings?

River Oak will offer a clear choice to parents and students interested in a distinctive middle school choice that is also academically rigorous and standard- and research-based. River Oak will use Wisconsin Charter Law to waive certain statutes and policies in order to innovate a powerful pedagogy in return for academic growth and measured accountability. It will offer a smaller learning community than the traditional middle school because of the staff and student relationships that will be built over a period of three years and the small school design. River Oak will be autonomous with an independent governance council empowered through a five-year charter contract. The council will oversee decision-making, budgeting, curriculum, schedule, flexible grade groupings, staffing, and professional development. River Oak is far more comprehensive than merely adding a program to the existing structure of Neenah Middle School, which includes a 6th grade housed at Horace Mann Middle School and a 7th and 8th grade housed at Shattuck Middle School.

Unique and innovative aspects of River Oak which are different than the Neenah Middle School program include:

- Project-based learning using in-depth inquiry methods, community resources, real-life applications, documentation and presentation in a variety of ways
- A strong focus on disciplinary literacy woven into all subject areas, with all teachers trained to deliver instructional literacy in both language arts and mathematics areas

- A standards-based curriculum structured around interdisciplinary concepts, themes and driving questions for all core subject areas with a primary focus on disciplinary literacy across all subject areas.
- Field and expeditionary studies into the local community
- A flexible schedule to allow for these components
- Collaborative, team teaching with common planning time
- Spanish World Language Instruction for all 3 years and for all students
- Art, technology, business, Spanish world language, health and wellness included in interdisciplinary studies and project-based applications
- Music studies required for all students for all 3 years
- Multi-age learning opportunities through project work and advisory groups
- Advisory program format with students assigned to an advisory group. This group will meet daily for classroom meetings, student governance and decision-making, learning about group dynamics and team building skills, and other life skills. Students will have the opportunity to develop a long-term relationship with a trusted adult and with their peers
- A structure that allows for collaborative community partnerships to make learning more relevant, practical, and meaningful; River Oak projects will connect students with families, business, industry, natural resources, recreation, non-profit, and civic groups

Although individual teachers may use projects, nothing currently available at the middle school level is comprehensive and focused in this way. Currently at the Neenah Middle School (6th and 7th-8th), the daily schedule is an 8-period day (including lunch). Each period is 53 minutes long. The weekly schedule is divided into a Day 1 and Day 2 rotation. River Oak will have a flexible schedule that is responsive to curricular and instructional needs. It will allow for large blocks of time for project work, expeditionary studies in the community, and variable scheduling blocks for foundational instruction, team teaching, and various aspects of project work.

The Neenah middle school at 6th grade (Horace Mann) uses a "house" structure to provide more nurturing, consistent relationships. The students then go on to 7th-8th grade (Shattuck) with a more traditional structure. River Oak will provide a 6th-7th-8th grade experience. It will use multi-age advisory groups and looping by the core teachers, in which they will have the students for more than 1 year.

The NJSD has a strong literacy focus and intervention services for students who are struggling. River Oak will build upon that through its team teaching and collaborative learning methodologies, use of community partners, a variety of assessments, and additional professional development in best practices in literacy instruction and intervention, disciplinary literacy, and mathematics literacy.

In order to have the governance and curriculum autonomy, academic flexibility and inherent choice that is necessary for a school like this, a charter school rather than just an additional program offering is needed.

d. Explain how the charter school provides its students' core academic subjects.

Core academic subjects will be taught using an interdisciplinary, collaborative teaching model that integrates concept and theme-based units within the context of challenging, real-world, in-depth project-based studies. The curriculum will be based on the Wisconsin Common Core Standards for Literacy and Mathematics and the NJSD standards which are closely aligned with this. The Wisconsin Next Generation Science Framework and Social Studies Framework (when they are available) will guide the development of the science and social studies curriculum. The Wisconsin Model Academic Standards for Science and Social Studies will be used until the new standards are developed.

The primary content of each project will be related to science and social studies curriculum, with the focus and depth of content in these subject areas varying depending on the project unit. The Common Core standards for literacy including reading, writing, speaking and listening in response to varying demands of audience, purpose and discipline, being able to use technology and digital media strategically and capably, and coming to understand other perspectives and cultures will be an integral part of *all* project work. Specific skills and language art content will also be delivered through seminars, modules, and workshops as needed.

The River Oak interdisciplinary, project-based curriculum will provide a world class liberal arts and 21st century skills foundation. Seminars and modules will present subject-specific content and provide direct instruction in foundational

skills. Workshops related to projects will allow students to practice skills, delve into subject matter, integrate the arts, health and wellness, business and engineering, and to learn and use a variety of practical skills and technology.

A rigorous, responsive mathematics curriculum congruent with the school's philosophy, the state's mathematics foundations, and the Wisconsin Common Core Standards for Mathematics will be designed. Students will have daily but flexibly scheduled mathematics instruction, with many hands-on, collaborative, and technology-based learning experiences. They will gain mathematical proficiency in problem-solving, reasoning, interpretation, and understanding. The curriculum for mathematics will include application of mathematics skills into project studies, expression of mathematical skills and concepts through models, use of tools, design and construction, data representation and presentations. It will also include focused, specific, and sequential instruction in data and statistics, algebra, geometry, probability, number, and measurement using a variety of teaching strategies and differentiated instruction. The school is considering the use of a specifically developed mathematics curriculum and/or one such as Connected Math that would be purchased.

Students will be assessed using formal and informal methods with an emphasis on performance-based and benchmark assessment. Parent-teacher conferences led by students, quarterly progress reports based on learning benchmarks and a grading system, individual digital portfolios, culminating project events, and virtual communication between home and school will be used to inform parents about their children's progress in the curriculum.

2. Provide a description of:

- a. **The grade levels of the children served** will be grades 6-8.
- b. **The primary education model to be used** is a project-based learning model with use of community partnerships. Projects will be primarily teacher-led using an inquiry model. The projects will focus on science and social studies concepts and themes, with integration of the Common Core Standards for language arts and mathematics. An interdisciplinary, collaborative teaching model will be used in conjunction with the PBL approach.
- c. **The measurable goals of the charter school (these goals must be reflected in the charter). This does not include student achievement goals (see 2e. below) and d. The means of measuring the charter school goals in each year of the charter. (to be reflected in the charter contract)**

Charter School Goals:

1. **Governance Board** – River Oak will establish and maintain an autonomous Governance Board that is well trained and informed to guide the school and oversee policies, personnel, fiscal management, and operational activities.
 - a. *Year 1 measurement:* Board established by September 2013; record of governance training; WISN statewide conference attendance; articles of incorporation for non-stock corporation by Dec. 1, 2013.
 - b. *Year 2:* New Board members elected by October 2014; board orientation by November 2014. Meeting minutes and training records.
 - c. *Years 3-5:* New Board members elected by October; board orientation by November. Meeting minutes and training records.
2. **Enrollment** – Enroll students in grades 6, 7, and 8 during the spring prior to the next school year. Provide at least two informational meetings in January-March; inform community through local media outlets and make announcements through district channels.
 - a. *Year 1 Measurement:* At least 100 students enrolled by September 2014; records of informational meetings and attendance, communications.
 - b. *Year 2:* At least 125 students enrolled by September 2015; records of informational meetings and attendance, communications.
 - c. *Years 3-5:* At least 125 students enrolled by September; records of informational meetings and attendance, communications.
3. **Core Curriculum** – Develop (1st year) and continue to develop and implement (years 2-5) a standards-based PBL and Interdisciplinary Learning Collaborative (ILC) model for curriculum for instruction in science, social studies,

mathematics, and language arts through curriculum writing by consultants and staff, and purchase of curricular related materials by August.

- a. *Year 1 measurement:* Written curriculum plan for 2014-15 by August 2014 with additional details, adjustments during the year. Records/notes of school visits, purchase of materials.
 - b. *Year 2:* Written curriculum plan for 2015-16 by August 2015 with additional adjustments during the year. Records/notes of school visits, purchase of materials.
 - c. *Years 3-5:* Written curriculum plan by August with additional adjustments during the school year. Records/notes of school visits, purchase of materials.
4. **Assessment** – Develop (1st year) and continue to develop and implement (years 2-5) a framework for formative and summative assessment models for core curriculum and use of digital portfolios by August of each year, with adjustments during the year.
- a. *Year 1 measurement:* Assessment plan developed by August 2014 with additional work during the school year. Assessment model and framework including a report card by August, 2014. Written plan and samples of assessments, teacher records.
 - b. *Year 2:* Assessment models and work completed by August 2015 with adjustments as needed during the school year. Written samples of assessment, teacher records.
 - c. *Years 3-5:* Assessment models and work completed by August with adjustments as needed during the school year. Written samples of assessment, teacher records.
5. **Encore subjects** – Develop an integrated instruction model for the teaching of Spanish, art, wellness and health, engineering and technology, business and information technology, and special education.
- a. *Year 1 measurement:* Written plan, instructional model by September 2014.
 - b. *Year 2:* Written plan, instructional model updated by September 2015.
 - c. *Years 3-5:* Written plan, instructional model updated by September 2016.
6. **Marketing** – Inform parents and the larger community about the charter school with open house/informational meetings in the fall, brochure and digital information about the school, and one spring culminating, presentation event that includes the parents and larger community.
- a. *Year 1 measurement:* Informational meeting for community and interested parents by October, 2013. Brochure created by January, 2014. Website live by March, 2014. Opening events by August and September 2014. Records of events, materials.
 - b. *Year 2:* Fall open house, spring culminating community events held; updates to written and digital materials by January 2015. Records of these events, materials.
 - c. *Years 3-5:* Fall open house, spring culminating community events held; updates to written and digital materials by January 2016. Records of these events, materials.
7. **Community** – Develop community partnerships and a community resource guide to enhance learning opportunities and fulfill goals of the school. Each year’s projects should include at least four community partners.
- a. *Year 1 measurement:* Draft of resource guide with contacts and information on businesses, nature centers, museums, civic and cultural organizations, other schools, community members, naturalists or environmental educators, scientists, engineers, artists and others by July 2014.
 - b. *Year 2:* Continued development of a resource guide, updated as needed through the school year; use of at least 4-6 community partners. Project records, resource guide with contacts and information.
 - c. *Years 3-5:* Continued development of a resource guide, updated as needed through the school year; use of at least 6 community partners. Project records, resource guide with contacts and information.
8. **Staffing and Training** – Hire all new staff by May 1 of each year to allow training of new staff and staff curriculum planning institute each summer.
- a. *Year 1 measurement:* All staff hired by spring 2014. Summer 2014 comprehensive training and curriculum development, workshops for skill efficacy, collaborative work time with other teachers, meetings with community partners and orientation meetings with students and families.
 - b. *Year 2:* Staff hired by May 1. Record of hiring, trainings, summer curriculum development.
 - c. *Years 3-5:* Staff hired by May 1. Record of hiring, trainings, summer curriculum development.

e. The measurable student achievement goals for each year of the charter not to exceed five years (these goals must be reflected in the charter) and f. The means of measuring the student achievement goals each of the first five years.

Providing a project-based, interdisciplinary learning environment with use of community resources and partnerships will make learning meaningful and relevant to students. Students at River Oak are expected to demonstrate high levels of achievement. Both quantitative and qualitative data will be used to evaluate student academic proficiency and 21st century skills. Growth will be monitored with use of formative and summative assessments. Performance data will be analyzed to ensure that students are demonstrating academic proficiency in all core subject areas. The STAR, a nationally standardized test for assessment in reading and math, will be administered five times a year to all students in addition to Wisconsin state assessments for middle school students.

Student Achievement Goals - Year 1 of the Charter:

- a. 80% of River Oak students will perform at or above district averages on the state assessment and STAR reading and math assessments. *Measurement:* Standardized test averages comparisons between schools.
- b. 100% of students are actively involved in River Oak's literacy initiative to become proficient in disciplinary literacy by reading and using a variety of authentic texts, vocabulary, writing, speaking, and listening within the context of different subjects and fields. *Measurement:* Project work documentation and records, teacher observation and assessment, writing samples, video and audio presentations.
- c. 85% of students at River Oak will participate in at least 4 in-depth science and/or social studies, standards-based, community-focused projects and will demonstrate proficiency in the following areas:
 - Science and social studies content and concepts
 - Communication skills through the recording of at least one oral report, one written report or essay, and one other form of written communication to be included in an individual digital portfolio.
 - Application of technology skills in all projects.
 - Mathematical literacy and skills related to projects.
 - Application of art, design, and construction skills in at least 2 projects yearly.*Measurement:* individual portfolio records, project demonstrations and records, work samples, teacher reporting.
- d. With teacher guidance as needed, 85% of River Oak students will demonstrate understanding of inquiry methods to design, research, analyze, and present 1 individual project appropriate for curricular goals and content per year. *Measurement:* Project work documentation, teacher observations and teacher report.
- e. 90% of students will share a project at a school-wide community showcase event. *Measurement:* Project Review and student PLP. Record of the event.
- f. 90% of students will participate in at least one student-led parent-teacher conference each year. *Measurement:* Teacher and student notes, documentation.

Student Achievement Goals - Year 2 of the Charter:

- a. 85% of River Oak students will perform at or above district averages on the state assessment and STAR reading and math assessments. *Measurement:* Standardized test averages comparisons between schools.
- b. 100% of students are actively involved in River Oak's literacy initiative to become proficient in disciplinary literacy by reading and using a variety of authentic texts, vocabulary, writing, speaking, and listening within the context of different subjects and fields. *Measurement:* Project work documentation and records, teacher observation and assessment, writing samples, video and audio presentations.
- c. 90% of students at River Oak will participate in at least 4 in-depth science and/or social studies, standards-based, community-focused projects and will demonstrate proficiency in the following areas:
 - Science and social studies content and concepts
 - Communication skills through the recording of at least one oral report, one written report or essay, and one other form of written communication to be included in an individual digital portfolio.
 - Application of technology skills in all projects.
 - Mathematical literacy and skills related to projects.
 - Application of art, design, and construction skills in at least 2 projects yearly.*Measurement:* individual portfolio records, project demonstrations and records, work samples, teacher reporting.
- d. With teacher guidance as needed, 90% of River Oak students will demonstrate understanding of inquiry methods to design, research, analyze, and present 1 individual project appropriate for curricular goals and content per year. *Measurement:* Project work documentation, teacher observations and teacher report.
- e. 90% of students will share a project at a school-wide community showcase event. *Measurement:* Record of the event.

- f. 90% of students will participate in at least one student-led parent-teacher conference each year. *Measurement:* Teacher and student notes, documentation.

Student Achievement Goals - Year 3 of the Charter:

- a. 90% River Oak students will perform at or above district averages on the state assessment and STAR reading and math assessments. *Measurement:* Standardized test averages comparisons between schools.
- b. 100% of students are actively involved in River Oak's literacy initiative to become proficient in disciplinary literacy by reading and using a variety of authentic texts, vocabulary, writing, speaking, and listening within the context of different subjects and fields. *Measurement:* Project work documentation and records, teacher observation and assessment, writing samples, video and audio presentations.
- c. 93% of students at River Oak will participate in at least 4 in-depth science and/or social studies, standards-based, community focused projects and will demonstrate proficiency in the following:
- Science and social studies content and concepts
 - Communication skills through the recording of at least one oral, one written report or essay, and one other form of written communication to be included in an individual digital portfolio.
 - Application of technology skills in all projects.
 - Mathematical literacy and skills related to projects.
 - Application of mathematics concepts in measurement, data collection, and data analysis in all projects.
 - Application of art, design, and construction skills in at least 2 projects yearly.
- Measurement:* individual portfolio records, project demonstrations and records, work samples, teacher reporting.
- d. With teacher guidance as needed, 93% River Oak students will demonstrate understanding of inquiry methods to design, research, analyze, and present 1 individual project appropriate for curricular goals and content per year. *Measurement:* Project work documentation, teacher observations and teacher report.
- e. 98% of students will share a project at a school-wide community showcase event. *Measurement:* Record of the event.
- f. 98% of students will participate in at least one student-led parent-teacher conference each year. *Measurement:* Teacher and student notes, documentation.

Student Achievement Goals - Years 4 and 5 of the Charter: Student achievement goals for years 4 and 5 will be the same as year 3.

3. Describe the charter school's two-three year professional/curriculum development plan by answering the following questions.

a. What specific competencies, skills and knowledge do teachers and administrators need to successfully implement the proposed primary educational model at the charter school?

Teachers and administrators at River Oak will need strong knowledge and understanding of charter schools and how they are unique and different under the law. They will need a specific understanding of the philosophy, curriculum, vision, goals, decision-making, and governance of River Oak.

Teachers and administrators at River Oak will need a solid understanding of what project-based learning is, the different models for PBL, and the focus of PBL at River Oak. Administrators will need to understand the unique competencies, teaching, and assessment methods being used in order to evaluate, support, and hire staff. Teachers will need to be competent in planning, implementing and concluding in-depth projects. They will need a solid understanding of the Wisconsin Common Core and the Next Generation Science and Social Studies Standards. They will need to know how to teach inquiry methods of learning and how to focus the driving questions and problems that form the focus of the projects. They will need to master a project management system such as Project Foundry. Teachers will need collaborative skills to work as a team, help develop collaborative skills in their students, and work with community partners. Teachers will need to be competent in teaching to multiple ages and grades, and in differentiated instruction. Teachers will need to be able to plan and write curriculum and to devise appropriate assessments to measure student knowledge and learning from their project work. Teachers will also need to use technology competently and apply technology to project work.

b. Provide a 2-3 year professional development plan on how you intend to develop the required competencies, skills, and knowledge for teachers and administrators to achieve the innovation envisioned for the charter school.

Planning Year - April, 2013 - July 31, 2014

A middle school administrator or administrators will be identified to be involved in planning the charter school. The administrator will visit PBL charter schools (at least 2), attend at least 1 innovative schools or PBL conference, work with

the identified charter school consultant in the planning of critical design features of the school along with the planning board, be involved with charter school governance planning and implementation, and review curriculum and assessment development. The administrator will receive PBL training and immersion as intensively as the teaching staff. The school administrator and planning team will attend the annual Wisconsin Innovative Schools Conference.

Core teachers for the charter school will be identified and hired in the winter of 2013 and spring of 2014. A summer planning and training session will be instituted for all River Oak teachers to include a Buck Institute training in PBL, additional training in interdisciplinary teaching and learning through use of consultants, training seminars, and conferences. Teachers will also use online PBL tutorials, manuals, DVDs, and other purchased training materials. For other aspects of the charter school, including use of advisory groups, multi-age teaching, standards-based curriculum, assessment, integrated curriculum and planning, training will include use of consultants, purchased professional development reference materials, WISN and UW-O resources, as well as online resources.

Eight specialist teachers, including special education, literacy and math intervention, art, wellness and health, and Spanish, will also receive instruction in PBL through the Buck Institute and use of consultants.

Significant curriculum and assessment planning time will be provided to all staff during the summers of 2014 and 2015.

Use of Project Foundry, an on-line, project-based learning management system will be researched during the planning year. Teachers will have training on use of this system during the summer of 2014.

First Implementation Year - August 1, 2014 - July 31, 2015

The school administrator and teachers will participate in at least 2 PBL school visits during the year to collaborate with and learn from the teaching staff at these schools. The school administrator and 4 core teachers will attend the annual Wisconsin Innovative Schools Conference. All teachers will attend at least 1 PBL conference or training institute during the school year and a summer follow-up training session in PBL through the Buck Institute. A consultant will provide additional support and training during the 1st year of implementation. Monthly district in-service days and other district in-services will support the development of technology integration and differentiated instruction. Follow-up training on use of the Project Foundry system will also be provided. New teaching staff will receive the same training as the initial group of core teachers. Collaboration with other schools using PBL and/or ILC models will be achieved through use of an HD video conference system.

Second Implementation Year - August 1, 2015 - July 31, 2016

The school administrator and teachers will participate in 2 PBL or ILC model school visits during the year to collaborate with and learn from the teaching staff at these schools. The school administrator and 4 core teachers will attend the annual Wisconsin Innovative Schools Conference. All teachers will attend at least 1 PBL conference or training institute during the school year and a summer follow-up training session in PBL through the Buck Institute. A consultant will provide additional support and training during the 2nd year of implementation. Monthly district in-service days and other district in-services will support the development of technology integration and differentiated instruction. Continued training in curriculum and assessment development, use of advisory groups, integrated instruction will take place with use of a consultant, purchased professional development materials, online and other seminars. Any new teaching staff will receive the same training as the initial group of core teachers. Collaboration with other schools using PBL and the Interdisciplinary Collaborative Learning model will be achieved through use of an HD video conference system. Ongoing staff collaboration and support time will be built into the weekly schedule.

c. Describe the necessary training that will be provided each year for new employees or employee transfers.

New employees or employee transfers will have at least two to three weeks of training in the summer prior to the start of the school year. They will participate in the summer curriculum planning institute with other staff. Training will be accomplished the first year through mentoring with one or more existing staff members experienced and knowledgeable in the school's philosophy, goals, teaching methodology, curriculum and assessment. A governance board member or the school administrator will provide orientation in the charter school governance, history, and unique aspects as a charter school. Buck Institute PBL training, use of a consultant, school visits, attendance at the WISN conference or other seminars, will be utilized and funded through use of district or governance board funds. New employees will also observe at another PBL school in the fall of their first year. Monthly district in-service days and weekly collaboration time with

other River Oak staff, collaboration with other schools through the HD videoconference system, will be opportunities for additional support and training.

d. When school districts authorize charter schools and receive federal funding, significant resources are invested in professional development during the initial 3 years. Please describe efforts that will be undertaken to retain these teachers in the charter school.

Efforts will be made to retain teachers by having a supportive, collegial school environment where teachers feel valued and are included in critical decision-making, curriculum development, and policy-making. Existing charter school staff will help orient and mentor new staff through their first years. The school administrator will provide support by valuing the goals, philosophy and unique methodology of the charter school and by facilitating teacher collaboration as needed. Teachers will be paid for their training time and for the time spent in summer curriculum planning. The NJSD administration is supportive of charter schools. The charter school will aim to have active parent involvement to support the teachers as needed.

Governance and Autonomy

Note: New requirement: the governance board must develop bylaws and become a non-stock corporation under Wisconsin law by Dec. 1, 2013.

1. Identify which exemptions from state law the school will take advantage of in order to maximize the flexibility afforded to charter schools by state law.

All state statutes and regulations and District policies will apply to River Oak except for those specifically designated for exemption authorization from the authorizer in this contract or future amendments. Waivers for exemption from state requirements are:

- a) Length of school day [Statute 121.01(1)(f)] to allow for a flexible schedule to take into account the varying needs of the PBL environment.
- b) Library media services [Statute 121.02(1)(h)] for the provision of an on-site library since River Oak will have access to the Neenah School District Library system.
- c) Number of School Days [Statute 121.02(1)(f)] to allow for flexible scheduling for both student projects that may occur on non-school days and staff attendance at professional meetings and conferences.
- d) Length of School Day [Statute 120.12 (15)] Option of completing coursework requirement outside of typical school day.

2. If applicable, submit a request and justification for waivers of any federal statutory or regulatory provisions that the applicant believes are necessary for the successful operation of the charter school. None are being sought.

3. School Board Policies to be waived.

- a) School Day Hours [District Policy 420 & 421] to allow flexibility of scheduling for PBL projects.
- b) In-service Program for Teaching Staff [District Policy 470 and 472.2] to allow for Charter governance board to evaluate and recommend training outside of the Professional Development Council.
- c) Non-resident Students [District Policy 512] to allow admittance to River Oak based on open enrollment criteria and River Oak lottery policy.
- d) Overnight field trips [District Policy 757.23] may be authorized by the Principal to allow for flexibility in scheduling.
- e) Selection of classroom materials [District Policy 654] to allow for River Oak to select materials appropriate to PBL approach.
- f) Outside research and survey projects [District Policy 660, 661, 662, 663, 664, 665] to allow for various surveys and questionnaires to be developed and utilized as part of the inquiry method of learning.
- g) Criteria for Judging Appropriateness of Research Projects [District Policy 667] to allow for expanded scope of research projects within a PBL approach.
- h) Daily Schedule of classes – to be exempt from existing 6th grade 8-period schedule and 7th and 8th grade 7-period schedule to allow for flexible schedule with PBL projects.
- i) Substitute Teachers – exemption from the number of days teachers may be absent from their classroom to allow for additional time for teachers to attend PBL conferences.

4. Charter schools have a separate governance board that is legally able to contract with the authorizer. This board has autonomy and control over charter school policies, procedures, personnel, instructional programs and the

budget.

a. Describe your plans to establish an independent charter school governing board if you have not done so.

The Planning Board will transition to the Governance Board no later than September 2013, and will consist of 7 members with a majority of parents and community partners. Articles of incorporation and bylaws will be established that will further delineate board member roles and responsibilities and decision-making for River Oak school policies, curriculum, strategic planning, relationship with the district, and management of funds.

b. Describe the authority this governing board will have to make decisions regarding budgets, personnel, curriculum, charter school policies and the overall operation of the charter school.

The governance board for River Oak will have authority for independent oversight of the budget, curriculum, personnel decisions, school policies and overall operation of the school. Specific procedures and responsibilities will be clearly defined in the charter school contract, bylaws, and policies; implementation and operational procedures will be developed by the governance board in conjunction with the developers of River Oak Middle School during the fall and early winter of the planning year, 2013-2014.

c. Include a description of the administrative relationship between the charter school and the authorizer and describe how the charter school will be managed. If sharing a principal with a traditional school, indicate how the management of the charter school will be impacted.

The River Oak principal will be shared with a traditional school. The administrator relationship between the charter school and the traditional school will rely on a strong sense of community, like the one that has been achieved in our elementary charter school, Alliance, and its host school, which use a shared principal.

The principal will be identified early so that he or she can be part of the planning process, participate in on-site consulting and training, and develop a strong understanding of the school's uniqueness. The principal will be trained in charter school philosophy, participate in WISN or other charter-related conferences and partake in the PBL training to gain a solid background and understanding of the school's philosophy, teaching methodology, and curriculum, and an understanding of the laws that give charter schools both unique authority and accountability. The NJSD supports the charter school and there will be high-level administrative support for the dual roles the middle school administrator will need to fulfill. Having a shared principal will benefit the staffs of both schools. The principal will facilitate a positive relationship for the charter school and NJSD community and be able to share an understanding of how beneficial the charter is for our community. River Oak will maintain its autonomous structure and foster community building within our schools and our broader community. As an instrumentality of the school district, the teachers will be NJSD employees and subject to the same regulations as other NJSD teachers. Performance reviews will be a component of the administrator's job.

d. Describe the specific training that will be provided to the charter board and when it will be delivered, e.g. governing authority, Roberts Rules, by-laws, finances/budgets, fund raising, parent involvement etc.

The River Oak planning and governance board will work with a consultant for training related to effective governance board design and implementation, strategic planning, Roberts Rules of Order, development of community partnerships, PBL and ILC philosophy and best practices during the planning year and first year of implementation. Board members will attend Wisconsin charter conferences or other WISN conference opportunities during the planning year and first year of implementation and at least yearly thereafter.

The Planning Process. Describe the present state of your planning process, the activities to date, the types of people involved in the process, the financial or other resources available, the involvement of the chartering authority or district school board, administration, staff; the involvement of parents and community; the work completed and the work which remains to be done to develop a successful charter school. Include these items in your narrative:

1. Provide a description of how parents and other members of the community have been involved in the planning and design of the charter school. Discuss the results of student data analysis and needs assessment measuring community and parent support for the new charter school. Describe how this school will close the achievement gap.

From a preliminary interest survey, to early inquiries and meetings, to the preparation of the planning grant, parents have driven this initiative—with the support of district administrators and the school board. Parents outside the planning group have also expressed sincere interest and enthusiasm about the possibility of a new alternative for the 1,400 middle-school students in the district.

Spring 2009: A survey of over 40 Alliance Charter Elementary parents showed very strong support for a charter middle school based on Montessori or project-based learning.

February 2012: Kathleen Hallett started a charter middle school initiative, knowing that the district administration had expressed support of charter schools, Alliance Charter had been successful, the district's financial status was improving, and parents had continued to express interest in a charter middle school. Kathleen began meeting with a small group of interested parents to formulate ideas and research options.

March 2012: A larger meeting (of about 20 parents) was held to discuss the goal of proposing a charter middle school and to look at different innovative options. More formal meetings were held from that point forward with a dedicated group of about 8 parents.

May 2012: The planning group met with Toni Hameister, an associate professor at Marian University in Fond du Lac who has researched innovative schools. She shared some of that research, some of the challenges of PBL, information about schools she had visited and helped us consider unique options for a charter school such as foreign language inclusion.

May 2012: The parent group met with Steve Dreger, Assistant District Administrator of Learning and Leadership (NJSD) and Phil Johnson, principal of Alliance Charter. We also met with Dr. Mary Pfeiffer, superintendent. We presented a proposal for a middle school charter based on our inspiration of Montessori middle schools using a placed-based approach and other project-based approaches. We expressed a desire to use local community resources to help in curriculum writing, planning, and implementation. Mr. Dreger and Dr. Pfeiffer stated we had the district's support in moving the proposal forward.

June 2012: The parent group met with Stephanie Phernetton and Chad Buboltz, Shattuck Middle School principal and associate principal, to discuss the proposal for the middle school charter and get their guidance. They expressed support of the idea.

July 2012: Oliver Schinkten, a science teacher in the Oshkosh school district, came to speak to about 45 interested parents at a public meeting. Mr. Schinkten spoke with enthusiasm about his experiences with PBL at Merrill Middle School in Oshkosh, its success with students with varying abilities, and the skills the students developed. He also discussed the PBL program with a community focus (Community School within Oshkosh North High School) that he and three other staff members were piloting. Those who heard Mr. Schinkten speak were very inspired. We voted to form a formal charter planning board and pursue a charter middle school in Neenah using PBL with a community focus.

August 2012: We established the planning board with Kathleen Hallett, a parent and occupational therapist with CHW-FV, also with educator certifications, as president, and Kim Krause, parent with teacher licensure, as vice-president. Other initial members (all parents of children in the NJSD) are Jean Maurice Boyer, vice chair of United Way Fox Cities Developing Children and Youth Impact Panel; Jodi Blank, current chairperson of Alliance Charter Education Corporation and assistant manager/program coordinator for an international work and travel program; Kara Allen, business consultant; Sonja Rusch, elementary education major at UW-O; Tracy Romzek, environmental engineer; and Catherine Holecko, freelance writer. Mr. Steve Dreger has served as the district administrator helping with the planning process. Mr. Dreger arranged for funds to be available for school visits and charter conference attendance by staff.

October 2012: The planning board presented the proposed charter to a special meeting of the NJSD school board and answered their questions. The board pledged support for writing of a planning grant.

Fall 2012: The planning board gathered input and support from district curriculum specialists, including Sue Nennig, director of curriculum, instruction and assessment; Anne Pergolski, K-12 math coordinator; and Lisa Weiss, literacy coordinator. Parents also met with Mr. Brian Wunderlich, principal at Horace Mann Middle School, toured Horace Mann and learned more about the 6th grade middle school curriculum and schedule. He shared that he knows of teachers there interested in PBL.

November 2012: Members of the planning board visited the Community School at Oshkosh North High School.

January 2013: Members of the planning board visited Fox West Academy in Hortonville.

January – March 2013: The planning board focused on grant writing, budget development, and the research, review, and discussions needed to define the charter school. Charter educational consultant came to share information and answer questions on PBL and ILC designs from the planning board and NJSD administrators on March 5, 2013.

To be completed: During the planning year, we will complete several key activities, including drafting the charter contract and presenting it to the NJSD School Board for approval before December 1, 2013. We will involve and engage potential teachers and middle school administrator(s) in the planning process. Teachers should be hired by May 1, 2014. Teachers will receive training in PBL and in ILC design.

Curriculum and assessment development will be critical, and planning grant funds will be used to hire consultants, engage district staff in developing the curriculum, including core subjects, encore subjects and Spanish. Research into potential