

PROPOSAL NARRATIVE

1. Charter Concept Description

Carmen Schools of Science and Technology is proposing to establish a new middle school that *replicates* the successful middle school educational model created at Carmen Middle/High School of Science and Technology, Northwest Campus, which was founded in 2013. The middle school would be based on the south side of Milwaukee with the intention of serving families living in the same neighborhoods that Carmen's South and Southeast high schools draw from.

Mission

Carmen's mission is to graduate all students as critical thinkers and self-directed learners prepared for success in college, meaningful careers, community involvement, and family life.

Vision

Carmen envisions students achieving proficiency in scientific inquiry, creative discovery, and constructive problem-solving; professional-level skills in the uses of 21st century technology; and admission to colleges that will lead to careers as civic leaders, authors, artists, scientists, teachers, doctors, or any other family-and community-sustaining career. "Carmen" is an acronym originally derived from the last names of well-known Hispanics whose successful careers are among those listed as goals in the Carmen vision statement. C = Cesar Chavez (community organizer), A = Isabel Allende (author), R = Diego Rivera (artist), M = Mario Molina (scientist), E = Jaime Escalante (teacher), and N = Antonia Novello (physician).

Carmen also envisions purposefully establishing a school culture and community based on specific "Habits of Mind" and "Habits of Heart:"

Habits of Mind: All students and staff pursue excellence in Eight Abilities: communication, analysis, problem-solving, applying values in decision making, social interaction, developing a global perspective, effective citizenship, and aesthetic engagement. All students and staff display passion for learning and appreciation for good work. All students and staff welcome new perspectives and challenging ideas.

Habits of the Heart: Everyone strives to bridge cultures through learning, work, service, and celebration. Everyone contributes to a vital and compassionate community. Everyone respects the multiple traditions that sustain democracy and build a just society.

Research Basis for the Educational Model

According to the National Assessment of Educational Progress (NAEP), Wisconsin continues to have the highest achievement gap in the country for African American students. By the time African American students are in the 8th grade, their NAEP math scores are an astounding 44 points behind their White counterparts – a gap that is 14 points larger in Wisconsin than the national average gap. The gap between Whites and Hispanics is not as large comparatively, but by the 8th grade Hispanic math students are still 23 points behind their fellow White students. Public education is the great equalizer, and yet in Wisconsin, and particularly in Milwaukee, most schools are failing to adequately educate children and teens, particularly children of color who come from low-income backgrounds. Carmen was established to

close these achievement gaps by addressing the serious educational disadvantages students bring to high school in Milwaukee.

Open for only three years, the middle school at Carmen Northwest has consistently outperformed traditional public schools in achievement gap closure. Even though students enter Carmen Northwest's sixth grade below the MPS average, the school is still only one of six MPS secondary schools (including both charter and non-charter schools) to either meet or exceed expectations on the 2016 Wisconsin state report card. Recent data show that students who spent two or more years at Carmen's middle school entered Carmen Northwest's high school with an average composite score two full points (equivalent to two years) higher on the pre-ACT than the students who entered Carmen's 9th grade from all other schools.

The Carmen approach integrates rigorous, college preparatory academic content learning with personal and life skills development, including career exposure activities in middle school and experiences in workplace settings in high school. The educational program incorporates the research-based College Readiness Benchmark standards developed by the ACT and which now serve as the underpinnings of the National Common Core Standards, and the internationally recognized Alverno College abilities-based educational model, which articulates "8 Abilities" students must achieve over the course of a liberal arts education. The research foundations for instructional approaches used to implement the model are outlined below in Section 6.

Rationale for Charter Status

Charter status is needed for the proposed Carmen middle school because exemptions from certain state and local education agency requirements are necessary for the school's operation. The Carmen middle school education model has several unique features that will distinguish it from other schools in the service area. (1) *Longer school day and school year.* Carmen middle school will operate from 8:00 a.m. to 3:45 p.m. daily and from the 4th week of August through the middle of June each year. (2) *Grading and grade promotion requirements are more stringent than those of public schools in MPS or in Wisconsin public schools in general.* Students who earn semester grades below a "C" or 73 percent are required to participate in school day and after school academic support with their teachers and in summer sessions to attempt to raise their grades up to a "C." This program also requires an extended school day.

2. Person(s) seeking to establish charter.

Patricia J. Hoben, Ph.D., Head of Schools, Carmen Schools of Science and Technology and Glen Hackmann, Chair, Carmen Board of Directors.

3. Name of person(s) in charge of school.

The south side middle school will be administratively led by a school leader appointed by Dr. Patricia Hoben, Head of Schools, with approval of the Carmen Board of Directors. The charter contract will be administered by Dr. Hoben and Mr. Glen Hackmann, Carmen Board Chair. Ms. Heather Heaviland, Director of Operations for Carmen, will address charter contract issues once a contract is in place. The planning for the new middle school is being led by Dr. Hoben with support from Ms. Kris Mac Donald, who served for two years as co-leader at the Carmen Northwest campus middle school and is now the interim Dean of Students and School Culture at the Carmen South high school campus. As Head of Schools, Dr. Hoben currently oversees the administration of all three existing Carmen schools. Ms. Mac Donald holds a Wisconsin school administrator's license, a Master's in Educational Leadership from MSOE via the Woodrow Wilson school leadership fellowship program, and currently is a Ryan Fellow in school leadership with Accelerate Institute. Parents from the Carmen Northwest middle school and

parents from Carmen Southeast and Carmen South high schools are also participating in focus groups and other planning activities for the new south side middle school.

4. Community responsibility, support for, and leadership of the educational process.

The Carmen community is broadly defined as those students, staff, parents, school leaders, and representatives of community based organizations that together build and execute the mission and vision of Carmen schools. The community believes it is the responsibility of Milwaukee's civic, community, and business leaders to develop new, high quality, and innovative educational programs for impoverished families and traditionally underserved student populations. Further, the Carmen community believes that all students must graduate from middle school prepared to enter a college preparatory high school and that all high school students must graduate prepared to enter and succeed in college and family-sustaining careers. Students learn best when they can see the real world applications of their knowledge. Limiting learning to the school classroom prevents youth from fully developing their ability to apply knowledge to new contexts and from pursuing the kinds of personal passions that lead to self-directed, life-long learning. Above all else is the Carmen community's conviction that all teachers, parents, and mentors must hold the highest expectations for the academic success of all children, regardless of their cognitive abilities, or cultural and socioeconomic backgrounds.

Each member of the community has a role to play in leading the fulfillment of this vision. Students and staff together establish the school culture making it possible for the school to have the most productive environment for teaching and learning. Both students and staff have many opportunities for input throughout the school year to ensure that all policies and practices are operating as envisioned and that all voices are being heard as the program is refined. Parents may help lead the implementation of the vision by serving on the Parent Association or the School Improvement Committee (a governance support mechanism) and by attending and supporting the many school functions offered beyond the two annual parent/student/teacher conferences. Community partners can provide services outside of the school setting or bring programs to the school and serve on the School Improvement Committee with other members of the school community.

The Carmen community believes that the combination of autonomy in governance, flexibility in organizational design, creativity in human resource development, and accountability for performance established through the Milwaukee Public Schools' non-instrumentality charter contracting and monitoring process will best enable Carmen staff, students, parents and community partners to realize their shared mission and vision as they practice their core beliefs.

5. Educational program description

Carmen's middle school academic program has been developed for a diverse population of educationally disadvantaged students with the ultimate goal of closing the achievement gap for low-income students and students of color and meeting or exceeding Wisconsin state outcomes on the ACT and the ACT Work Keys exams. Key elements of the model are detailed below.

STEM Focused College Prep and Rigorous Academics

ACT has published numerous studies showing that one of the single factors with the highest correlation to a student actually completing a college education is the academic rigor of his or her high school curriculum, as manifested in the number and types of academic courses completed. Carmen's academic courses are vertically aligned from grades 6-12. In order to graduate from a Carmen school, students must complete four years of college preparatory mathematics, beginning with at least Algebra 1 and ending with at least with Pre-calculus or Calculus; five years of English (including two full-year courses in 9th

grade); four years of social studies/history; and four years of laboratory science. In addition, students must take at least three full years of Spanish, and two or more semesters in the Arts. The purpose of having a focus on science at Carmen is two-fold: to create scientific habits of mind that are useful in any life pursuit, and to meet the demand for workers in the science, technology, and engineering careers.

Middle school students must take three years of mathematics aligned to the Common Core standards such that most students can enter high school ready to take Geometry rather than Algebra and have the opportunity to complete Calculus by graduation. The Carmen middle school humanities curriculum follows the Common Core frameworks for literature, language and social studies and is supported by instructional resources from the Great Books Foundation. The science curriculum at this level includes inquiry modules from the Delta Education FOSS Middle School Science Curriculum and the Carolina Biological STC Secondary School Curriculum, both of which align with the national Next Generation Science Standards, also adopted by Wisconsin. (See Appendix L for more comprehensive information on the curriculum framework.

Stopping Social Promotion. Carmen knows that for students to stay and succeed in college they have to be prepared to attain at least a “C” in each of their classes. Therefore, the Carmen grading and grade promotion requirements are more stringent than those of other Milwaukee area and Wisconsin public schools. Students who earn semester grades below a “C” or 73 percent are required to participate in mid-year inter-session and/or summer session terms to attempt to raise their grades up to a “C.” Similarly, middle school students are not promoted if they earn lower than failing grades in more than half of the core courses after participating in summer sessions.

Career and Technical Education Program. Carmen is collaborating with local technical colleges and other colleges in order to develop Career and Technical Education programs in health professions, information technology, and engineering to supplement the core Carmen curriculum. This program has a dual purpose: 1) ensure students have multiple pathways to family and community sustaining careers, and 2) increase the diversity of course offerings to better help students explore interests and develop passions. Middle school students will be prepared to enter a Carmen high school ready to participate in the CTE curricula through career readiness activities in the advisory program supplemented by career exposure partnership programs for middle school students with Marquette University, HUSCO and other engineering firms, MATC, Froedtert Hospital and Aurora Health.

Intervention Opportunities

While the components of Carmen’s core model described above are critical to student success, reaching all students requires supplementary programs and individualized approaches that complement and support core academics. These interventions ensure that all Carmen students, including the lowest and highest performing students are provided the resources needed to significantly increase their academic growth each year.

Blended Learning. Carmen utilizes computer based math and reading programs to identify students’ foundational skills and set growth and attainment goals for the year. Students spend 45 minutes per day using either ALEKS for math or Achieve 3000 for reading.

After School Support. Students who are earning grades below a “C” are required to attend an after school academic tutoring program until the student consistently maintains a “C” or higher. Each teacher leads structured academic support sessions one day per week allowing students to seek after school assistance up to four days per week in different subject areas.

Summer School. Carmen offers a three-week summer school program during which middle school students can gain remedial support and enrichment and also undertake physical fitness activities and various community service projects.

21st Century Skills and Career Readiness

Bridge Program. Students new to the middle school attend a 40-hour program in August that includes orientation to Carmen’s culture, mission and vision and practice of the life and study skills necessary to be successful in school. Math and literacy instruction is also included to help get the students ready for middle school level work. Students are introduced to strategies for developing the growth mindset, character traits, and planning skills necessary for success in school.

Advisory Program. All students are assigned to an advisor from the first day of the Bridge Program. The advisor -- usually a teacher, but other staff also may elect to serve in this role -- works with the student through to graduation. The role of the advisor is to assist the student in the developing high school, college and career readiness skills and to ensure that the student has access to the resources he or she will need to be successful at Carmen. The Carmen middle school environment is built upon strong relationships based on the school’s core values of respect, responsibility and trust. Through the Middle School Advisory Framework (See Appendix L), the school ensures a safe, welcoming, and aspirational learning environment focused on achieving our middle school mission and vision “Earn. Celebrate. Grow.”

Character Education. Carmen has developed a cultural framework (The Community Trust) based on three core values: respect, responsibility and trust that all staff and students apply consistently in recognizing positive and negative behaviors. Further each school adopts a set of character traits that all work to develop and celebrate.

Eight Abilities Framework. Carmen partnered with Alverno College in Milwaukee to scale Alverno’s internationally-recognized Abilities-Based Instructional Model for adolescents in a secondary school setting. There are eight abilities all Carmen graduates must demonstrate mastery of by graduation: aesthetic engagement, analysis, communication, developing a global perspective, effective citizenship, problem solving, social interaction, and valuing in decision making. These abilities are initially introduced in 8th grade to prepare students for the Carmen high school experience.

Community Service. Carmen requires middle school students to complete at least 10 hours of community service annually. Most service projects are carried out jointly with teachers, parents, and the school’s local community partners and are tied to learning goals embedded in the school’s advisory curriculum.

The following appendices also are attached to this proposal: Appendix A: school calendar, Appendix B: student day start and end times, Appendix C: uniform policy. Specific instructional strategies to implement the educational model are detailed in section 6. “Strategies for Attainment o Educational Goals.”

6. Strategies for attainment of educational goals

To achieve its educational mission, the middle school aims to (1) increase student achievement, (2) close long-standing achievement gaps, particularly racial and economic gaps, and (3) achieve performance results across a wide spectrum of success indicators including attendance rates, mobility rates, graduation rates, high school non-completion rates, and college enrollment rates. Carmen schools must perform at least as well as district schools on all measures to meet the terms of its charter contracts but the ultimate goal is to have students at Carmen achieve at or above Wisconsin state averages for *all* students.

In addition to the academic performance outcomes set forth in the charter school contract for all non-instrumentality charter schools, the expected outcomes Carmen expects to be held accountable to are as follows:

Student Academic Outcomes

- Students who graduate from the 8th grade at the south side Carmen middle school after being enrolled two or more years there will enter a Carmen high school with an average composite score on the pre-ACT or equivalent assessment that is 1.5 points (approximately 1.5 grade levels) higher than the average score of students enrolling in Carmen's south side high schools from all other K-8 or middle schools.
- Fall to Spring scores on the NWEA MAP assessments for students in grades 6 and 7 will show at least 60% of students meeting their growth goals.
- NWEA MAP assessments for students in grades 6 and 7 will show an average growth of at least 120% of projected growth from Fall to Spring.
- Fall to Spring growth on the pre-ACT or equivalent test will be 1 point or higher for students in 8th grade in reading.
- Fall to Spring growth on the pre-ACT or equivalent test will be 1 point or higher for students in 8th grade in English language.
- Fall to Spring growth on the pre-ACT or equivalent test will be 1 point or higher for students in 8th grade in math.
- Fall to Spring growth on the pre-ACT or equivalent test will be 1 point or higher for students in 8th grade in science.

School Culture Outcomes

- The school-wide average daily attendance rate exceeds the average daily attendance rate for MPS students in grades 6-8 in the first year of operation and all subsequent years.
- The school-wide average daily attendance rate is 90 percent or higher in year one, 92% or higher in year 2, 94% or higher in year 3 and subsequent years.
- September-to-September student keep rate is 80% or higher each year.
- Annual September to September teacher return rate averages 80% or higher after the second year of operation, not including those who a) are not asked to return due to performance issues; b) leave because they move out of Milwaukee or Wisconsin; or c) have a significant life change that causes them not to return to work.

Instructional Strategies

Teachers use a combination of instructional approaches to meet educational goals. The Carmen Instructional model centers on the belief that effective instruction is student centered with the teacher facilitating learning instead of imparting knowledge. In order for teachers to deliver this type of instruction, they must use strategies to manage their classroom and deliver content. Carmen teachers are trained in and continuously practice Doug Lemov's Teach Like a Champion strategies. Additionally, teachers must use data to design their instruction to tailor content and approaches to learning to the strengths and areas for growth of their students. With this data, they are then able to choose the appropriate best practices to design their lessons. Among the best practices used by Carmen are rigorous reading access points and Great Books' Shared Inquiry discussion methods to instill in students the ability to access content on their own through strong reading skills. The comprehensive instructional and coaching model is located in Appendix P and summarized below.

Teach Like a Champion Strategies. The strategies in Doug Lemov's Teach Like a Champion originated from his study of the successful Uncommon Schools charter schools in New York. He identified 49 strategies of master teachers to help new and struggling teachers become champions in the classroom. Carmen's schools use these concrete, specific, and easy to learn steps in onboarding new teachers; in ongoing professional development of all teachers, regardless of content area specialty; and during individual instructional coaching of teachers. Carmen teachers use Teach Like a Champion strategies to set high academic expectations, engage students in the lesson, create a strong classroom culture, and set and maintain high behavioral expectations.

Data-Driven Instruction. As described in Paul Bambrick-Santoyo's Driven by Data, when implemented well, data-driven instruction has the power to dramatically improve student performance. Carmen leaders and teachers continuously address the four components that need to be in place: rigorous assessment, skills in analysis, accountability of action, and a growth mindset culture. Teachers collaborate with others who teach the same course as well as with school and network staff to design and vet rigorous assessments. After delivering these assessments to students, teachers analyze the results to determine what their students know, what their students are struggling with and, as a result, what instructional strategies were successful or unsuccessful with their students. In collaboration with the course team and instructional coach, teachers then make action plans to increase their students' achievement. This process occurs not only at the end of course units with summative assessments, but also throughout units with formative assessments. The growth mindset leads the teachers to believe they can always improve in their instructional choices and that their students can always improve.

Rigorous Reading Access Points and Great Books Shared Inquiry. Carmen has embraced the strategies of Doug Fisher and Nancy Frey in Rigorous Reading, including their research-based five access points to rigorous reading: purpose and modeling, close and scaffolded reading, collaborative conversations, an independent reading staircase, and demonstrating understanding and assessing performance. By including reading instruction in all classes, Carmen teachers are developing students as self directed learners by increasing their ability to access content through their own reading.

Teachers also facilitate higher level discussions of literature and informational texts in all content areas using the Great Books Shared Inquiry technique. This discussion method of teaching has been developed and refined by the Great Books Foundation over the last sixty years. Similar to Socratic seminars, Shared Inquiry discussions are led by students answering a discussion question after completing activities to effectively use the text in their discussion. In this process, students read and annotate the text. Next, they re-read the text using a specific annotation strategy designed by their teacher. Lastly, before they begin the discussion, students form their answer to the shared inquiry question. Throughout the discussion, students are prompted to respond to each other using textual evidence. After the discussion, students reflect on their answer to the shared inquiry question using their experience in the discussion.

Vertically Aligned Best Practices. Content in each subject is vertically aligned throughout grades 6-12 in Carmen schools to ensure that students are building on their knowledge and skills each year. Additionally, each grade level focuses on specific study skills, note taking techniques, and organizational habits, so that students are gradually building towards greater ownership of their learning. Content-specific study skills, note taking techniques, and organizational habits, such as research and writing skills, also scaffold throughout each year of instruction. Teachers use these guides to make decisions about instructional strategies appropriate for their subject area and grade level.

Co-Teaching. Carmen's student support services program includes co-teaching by regular and special education teachers to create supportive and inclusive classrooms as well as resource room support. Also,

the Carmen Middle School model includes elements of co-teaching by humanities and STEM teacher teams. Instruction in co-teaching classrooms varies depending on the strengths of the teachers and the content of the lesson. Collaborative options include one teacher/one assistant, one teacher/one observer, station teaching, parallel teaching, alternative teaching, and team teaching. All co-teacher teams use a variety of co-teaching strategies and minimize the use of one teacher/one assistant and one teacher/one observer approaches.

Services for Students with Special Needs

Carmen supports and provides special education services to students with a variety of disability designations. Each student receives special education and related services to address needs based on his/her Individualized Education Program or IEP. A student with a disability is entitled to be educated in the least restrictive environment, which means the student must have the opportunity to utilize the general education curriculum and as often as appropriate with non-disabled peers. The IEP team determines the type and amount of services needed, and students are given a service level designation based on the number of hours of service needed per week. For students with disabilities who enroll at the Carmen middle school, the same services will be provided. School staff members make contacts with school counselors and special education teachers at potential feeder elementary schools as well as MPS student services to identify students with special needs who may be interested in attending the school.

A smooth transition for special needs students from other schools to Carmen is enhanced by post-enrollment orientation sessions and one-on-one meetings with incoming families of special needs students, and by reviewing the IEP. All students, regardless of their special needs, have a unique opportunity to learn and grow at Carmen. For students with disabilities, Carmen is an excellent place for a student to develop while receiving the support and mandated services he or she needs, including college preparation support. The IEP team determines the appropriate services for each student with the goal of placement in the least restrictive environment possible. The amount of time each student will participate within the general curriculum and away from the general curriculum will be determined by the IEP team based on each student's individual needs.

A variety of assistive technologies are available in order to make accessing the general curriculum possible for students with disabilities. Students have access to computers, books on tape, computerized reading programs and dictation programs to assist students in accessing the general curriculum and performing at their highest level. Having access to these types of assistive technologies can greatly increase a student's confidence and foster the manifestation of his or her true abilities and talents.

Carmen has a network Special Education Coordinator who coordinates initial evaluations, monitors IEP compliance, reporting, and related activities. Further, Carmen employs certified special education teachers in a ratio of approximately 1 F.T.E. teacher per 15 students with IEPs; however, staff numbers are dictated by the numbers of students with disabilities and the specific nature of the services required.

A complete Special Education Services Plan is provided as Appendix F.

Other Service Areas

English Language Learners are provided services by specialists supported hired using federal Title and per pupil funds.

The middle school will employ a full-time School Social Worker who helps support the social/emotional needs of students and families and also supports school staff members in meeting those needs as appropriate in their respective roles.

The school will have a library with fiction and non-fiction instructional and student resources and access to on-line resources in a full range of subject areas appropriate to support the middle school curriculum. School staff members and teachers are trained to use the library and made familiar with the research resources available for classes and for individual student use. Volunteers also support student access to and proper use of the library and media resources.

7. Measurement of student progress

In addition to the mandated state and district tests (e.g., Wisconsin Forward and STAR), the new middle school will also use the NWEA MAP exam to assess academic growth in grades 6 and 7 students and the pre-ACT exam for 8th grade students to measure high school and college academic readiness.

Beyond standardized testing, Carmen believes that assessment of student learning must inform and guide the practices of our teachers. Both students and teachers must learn to assess their own performance and learn to adjust their efforts accordingly. Carmen schools want to be held to the highest public standards for accountability and thus we also conduct local assessments that allow the public to compare the overall achievement of a Carmen school with that of other schools statewide and throughout the nation.

Assessment of student learning should measure student knowledge, performance, and progress and always should be based on clearly stated objectives, criteria, and/or standards to ensure the data actually measure what they are intended to measure (i.e., are valid). Carmen also believes that assessment should be formative (during the learning process so adjustments can be made mid-course) and summative (at the end of a unit or course to look at performance in relation to set standards for achievement).

Examples of *formative assessments* include: quizzes and tests (e.g., comprised of multiple choice or fill-in or true-false or short answer or essay questions), lab reports, and student self-assessments (e.g., reflections or questionnaires). Examples of *summative assessments* include: norm-referenced exams (e.g., ACT or MAP), which measure a student's performance relative to a normal/bell curve; criterion-referenced exams (e.g., Wisconsin Forward), which measure a student's performance judged in relation to specified criteria and seek to demonstrate the student's proficiency in outcomes associated with high standards; final examinations; student portfolios; and senior project reports and presentations.

Tools for Measuring Progress on Goals

The middle school will use many different kinds of tools to measure progress on core goals, including the following examples:

- Standardized exams (e.g., pre-ACT, Wisconsin Forward, MAP, STAR)
- Classroom-based quizzes and tests (used primarily to measure subject area content knowledge)
- Performance assessments (used to measure one or more of Eight Abilities in the context of a particular content area)
- Student portfolios
- School program and activity logs and records
- Staff, Student, and Parent Survey Instruments

An assessment plan is attached as Appendix O to this charter proposal and specific performance measures also are listed in the Executive Summary.

8. Governance

The middle school will be managed under the auspices of Carmen High School of Science and Technology, Inc., a nonprofit corporation established in 2007 and that currently oversees three distinct charter schools. A Carmen Board of Directors now serves and will continue to serve as the principal governing and policy-making entity of the nonprofit corporation. The Bylaws of the corporation specify that the Board may have no fewer than 3 and up to 13 voting members and the Head of Schools, who is a non-voting member.

Summary of Management and Governance Structure of School

The middle school will be a non-instrumentality charter school and its Board of Directors maintains independent governance authority. The school will be lead by a Principal who reports to the Head of Schools who in turn reports to the Carmen Board of Directors. the Bylaws state that the governing board will meet regularly and hold one annual meeting. The annual meeting is held in April. Officers are elected at the annual meeting, as are new members; however, new members may be proposed and elected at any meeting of the Board.

The full Board of Directors meets six times per year and its Executive Committee meets on the alternating months. The Bylaws charge a *School Improvement Committee* (SIC) with advising the Board of Directors on the school's Education Plan (i.e., annual strategic plan with goals and objectives) and making recommendations to the Board on program directions and resources needed to meet the school's measurable goals for each school year. The SIC is responsible for ensuring that the school's budget and human resources are aligned with the education, parent involvement, and community engagement plans, local performance measures, and qualitative and quantitative benchmarks identified in the charter contract. The school's progress in meeting its educational plan goals is monitored by the SIC, which has representatives from the faculty, the student body, the Board of Directors, the Parent Association and other community organizations (e.g., area universities, businesses that sponsor student interns, community and neighborhood organizations, etc.) that partner with Carmen Schools to support the charter network's mission and vision.

Authority of Governing Board

The governing Board of Directors maintains authority over all decisions regarding school operations and together with the Head of Schools is accountable to the charter authority (MPS Board of School Directors) for ensuring that each charter school follows the provisions of the non-instrumentality charter school contract. The Board of Directors has sole authority over approval of budget, the education plan, hiring and evaluation of the Head of Schools, overseeing the annual fiscal and contract compliance audits conducted by an outside firm, and developing and setting policies in these and other areas.

Names/Titles of Governing Board Members

- Glen Hackmann, R.W. Baird (Chair)
- Jason Kohout, Foley and Lardner, LLP (Treasurer)
- Sharon Canter, Community Volunteer
- Tom Ellis, Silver Spring Neighborhood Center
- Ivan Gamboa, Tri City National Bank
- Craig Jorgensen, VJS Construction Services
- Agustin A. Ramirez, HUSCO International, Inc.
- Todd Reardon, Braeger Co. of Wisconsin

- Barbara Wanzo, Blark Arts Milwaukee
- Patricia Hoben, *Non-Voting Member* of the Board of Directors (Head of School)

Involvement of Parents and Community

Parents and community members may serve on the school’s Board of Directors, as well as the Board’s School Improvement Committee and the *Parent Association*. All parents are expected to participate with their children in the school’s community service program and to spend some time volunteering at the school. Attendance at fall and spring parent/teacher conferences is mandatory. In addition, participation in parent workshops is expected of parents. Workshops cover topics that parents request and generally are aimed to help parents grapple with parenting issues such as bullying, what it takes to be successful in a college preparatory school, health and welfare issues, etc. The school also encourages community partner involvement. Community partners are invited to assist students and the staff in many different ways, including tutoring, career information, providing jobs and internships, and helping the school to develop strong relations in the neighborhood of the school.

The Parent Association (PA) leads fundraising by parents and serves as a volunteer support group for the school. This organization gives parents an opportunity to be empowered with knowledge of the school’s operations. The PA also assists the Board indirectly through its roles in fundraising and reporting information about issues of interest to parents. All parents are encouraged to take on PA leadership role and/or to participate in the organization. The PA leadership prepares and presents written and oral reports of PA activities to the School Improvement Committee and the Board of Directors.

When a student enrolls at the school, he/she and parents will be required to participate in a one hour in person meeting before the start of the school year at which the school’s educational goals and strategies and operational policies are reviewed. After the meeting, the parent and student sign contracts acknowledging their receipt and understanding of the school’s expectations and policies.

The school is committed to working with students and parents/guardians to resolve issues of concern in a mutually agreeable fashion. According to the school’s Parent/Student Handbook, if at any time a parent has a complaint that is not satisfactorily addressed by the staff at the school, he/she is directed to schedule a phone or in person meeting with the Head of Schools to seek resolution of the concern. After this meeting takes place, if the parent is still not satisfied with the school’s handling of the issue or concern, he/she is directed to the Chair of the Board of Directors, who will schedule a meeting to discuss and attempt to resolve the issue of concern. Each year, the Head of Schools meets with parents in an open-ended forum in the Fall and Spring to identify strengths and challenges at the school in order to help the school leader and faculty team be proactive in addressing issues of concern of families as they emerge and to celebrate successes.

9. Certifications and qualifications for employment

Teachers and the school leader will meet the professional standards required by the state of Wisconsin for their respective positions. Faculty will possess valid teaching certificates or Charter school licenses in accordance with Wisconsin statutes 118.19(1) and 121.02(1)(a). Additional standards for the professional staff may be set forth by the school’s Board of Directors. School leaders are evaluated by the Head of Schools and the network leadership team using the Wisconsin Department of Public Instruction’s principal evaluation tool and the Carmen school audit process (see Appendix P). The top three criteria for evaluating a teacher’s job performance are: (1) Teaching all the required curriculum for each course and successfully integrating the Common Core or other relevant Standards; (2) Successfully incorporating Alverno College’s Eight Abilities into the curriculum and performance assessments; and (3) Demonstration of ability to identify one’s own strengths and areas in need of improvement and to develop

professionally through goal setting and implementation of plans that support the goals. Teachers are evaluated by the school leader using a modified Charlotte Danielson framework (see Appendix P). New teachers are given a preliminary evaluation at three months and a formal evaluation at six months and have access to an experienced instructional coach throughout the first year of teaching. In addition, the teacher writes a Professional Development Plan (PDP) and plans for meeting benchmarks for student academic growth under the school's local assessment measures. Compensation is determined on a scale commensurate with traditional MPS schools. Any performance bonuses are approved annually by the Board of Directors.

Carmen will work to identify and recruit ethnic minorities and Spanish speakers to serve as faculty at the school. The Carmen has a strong partnership with Teach for America Milwaukee, which has been a significant resource for recruiting teachers of color. As a growing organization Carmen Schools has been working to recruit nationally as well.

With the goal of identifying a large and diverse job candidate pool, advertisements for all of the positions will be posted starting in fall 2017 in a variety of forums, including the Department of Public Instruction web site, the Teach for America national network site, and Milwaukee area and out of state colleges and universities. Teacher referrals are also a very important way to identify strong candidates to serve at Carmen schools.

10. Health and safety procedures

The new middle school will adopt the existing Carmen Schools of Science and Technology safety and crisis handbook, which employs best practices and complies with MPS codes. If a tenant in an MPS building, the school will cooperate with MPS in its regular inspections of the facility for safety, systems operations, hazardous materials, and other health and safety factors.

11. Student population to be served

Students from all over Milwaukee will be welcome at the south side middle school, but marketing and recruitment efforts will focus on the neighborhoods where the school expects to be located and where most of Carmen's current south side high schools' families reside, which primarily includes the 53215 and 53204 zip codes. Since Carmen does not provide transportation services, students at Carmen schools tend to live within a 2-4 mile radius of the school. Carmen will target fifth grade students from MPS K-5 schools in the service region and also will target students who would otherwise remain enrolled in the parochial K-8 schools in the service region. Carmen is better positioned to reach middle school students than other stand-alone middle schools because of the strong name recognition of Carmen's original south side high school and the fact that these middle school students will be eligible to enroll directly in a Carmen high school, either Carmen South or Carmen Southeast. United Community Center's two middle schools and the new St. Augustine Prep middle school are recruiting significant numbers of middle school students from 53204 and 53215 and surrounding areas, and Carmen is well-positioned to compete with these non-MPS entities, making it more likely that students will start in an MPS school by 6th grade and remain through high school.

Demographic data from the 2010 census show that the majority of students in the primary target area are low-income and Hispanic, with a smaller but growing population of African Americans. Recruitment of special needs students will be accomplished by working directly with families attending existing Carmen schools as well as counselors, social workers and school leaders from K-5 MPS schools and K-8 private schools in the target region. Special efforts will be made to ensure that students with IEPs submit enrollment forms by the published submission deadlines in order to be included in the first lottery, or if no lottery is required, admitted early in the enrollment process.

Carmen is committed to adopting some less traditional student recruitment strategies that will generate interest in hard-to-reach communities and neighborhoods. Examples already planned include:

- Distributing information meeting fliers and brochures at local churches, coffee shops, popular stores, and cultural festivals scheduled for the 2017-2018 school year preceding the opening of the new school
- Recruiting students and parents who are enrolled in Carmen’s south side high schools to serve as spokespersons and advocates for the school in a variety of settings
- Canvassing, door-to-door, single resident homes, apartments, and public housing
- Working with south side organizations that advocate for families of students with special needs

The middle school’s Diversity Plan and the Special Education Services Plan are attached to this charter petition as Appendices E and F, respectively.

12. Enrollment procedures

The new Carmen middle school will be open to all students of appropriate grade levels. Because a major operating goal is to ensure all students are prepared for high school, most students will be enrolled in the 6th grade entry year so they have the opportunity to go through all three middle school years at Carmen. A more limited number of transfers will be accepted as 7th and 8th grade students. The school requires all students who wish to apply to submit report cards from the past school year and to write a brief essay describing why the student wishes to attend a Carmen school. This application information is *not* used for selection purposes. All students who apply to the school are accepted unless the applicant pool exceeds the available seats. In that case, a lottery is held. The student’s application, including grade reports and the essay, are used in a one-hour meeting that is held with each student *after* a seat has been offered. The purpose of the meeting is to carefully review the unique requirements of the school with each family to ensure that the family clearly understands the expectations. The meetings are intended to provide a realistic overview of what is offered and expected by the school, and to get the student and families excited about the prospects of an education that prepares him/her for college preparatory high school education.

13. Enrollment and grade level distribution

The school will open in 2018 with a single 6th grade class and total enrollment will grow according to the schedule shown in the table below. If in the first year of operation the full capacity for 6th grade cannot be met, then the school will open one section of 7th grade. The model shown offers a conservative growth scheme over the five year term of the charter until 320 students in grades 6-8 enrollment capacity is achieved.

School Year	Grade Levels	Student Enrollment
2018-2019	6,(7 possible)	80
2019-2020	6,7	140
2020-2021	6,7,8	200
2021-2022	6,7,8	260
2022-2023	6,7,8	320

14. Proposed budget

A complete proposed five-year budget plan is attached to this charter petition as Appendix G. Carmen has been awarded a grant for replication of the Carmen middle school model from the U.S. Department of Education in the amount of \$800,000. The grant is to be used for the start up expenses associated with the establishment of the new south side middle school, including furnishings, equipment, curriculum materials, technology, and some staff costs that can be sustained once school enrollment is at capacity. Carmen has also received a five-year \$100,000 per year grant commitment from the M and I Foundation that will be used for the replication of the middle school. The Charter School Growth Fund also has committed a grant of \$250,000 to Carmen for start up expenses related to the replication of the middle school. Carmen also will seek other grants to support the start up costs that can not be covered by public per pupil funds from MPS until enrollment is at the 320 student capacity.

15. Annual financial and program audits

An annual fiscal audit and the required contract program performance and compliance audits will be conducted by Reilly, Penner, & Benton, LLP. Carmen High School of Science and Technology has contracted with this firm since 2007.

16. Student discipline procedures

The school elects to have its own discipline policy, the same one approved for the three existing Carmen schools. The policy is attached as Appendix H. The foundational principle of the Carmen discipline policy is that the students and staff operate under a Community Trust agreement and that this Trust must be maintained in order for the school to maintain a culture that reflects the school's three core values of Respect, Responsibility and Trust. The middle school also adopts a set of character traits that are embedded in all activities throughout the school day such that each student and staff member strives to manifest the positive behaviors that are reflective of the school's selected character traits. Middle school students are celebrated in a variety of ways for modeling the school character traits. By the same token, behaviors that are inconsistent with the kinds of positive behaviors representative of the character traits are subject to disciplinary actions as described in Appendix H.

Under the school's policy, parents can appeal decisions made by the school leader directly to the Head of Schools and, if not satisfied with response from the Head of Schools, will be referred directly to the Chair of the Carmen Board of Directors.

Procedures for disciplinary actions regarding students, including a complete description of the appropriate due process afforded under law as well as offenses that can result in suspension or administrative transfer are described in detail in the policy document given at Appendix H.

17. Public school alternatives

A primary reason for opening the middle school is to create a strong high school preparatory middle school that prepares students for success at schools like Carmen South and Carmen Southeast. Thus Carmen is seeking a location that is accessible to families that are currently enrolled in Carmen's high schools and are interested in having younger siblings at a Carmen middle school as well as others living nearby Carmen's two existing south side high schools. Many of these families are from non-MPS charter schools and parochial schools on the south side.

Students who do not wish to attend this charter middle school have other alternatives in the MPS system including K-8 and middle schools and other private schools participating in the Milwaukee Parental Choice Program. Middle school age students in the attendance area can attend south side MPS traditional and charter schools such as Greenfield Elementary, Morgandale Elementary, Rogers Street Academy, La Causa, Longfellow Elementary and Wedgewood IB Middle School. Non-MPS charter and private schools also operating in the target neighborhoods include: United Community Center's two middle schools, Notre Dame, Nativity, St. Adalbert, St. Rafael, Prince of Peace, St. Anthony, and the new St. Augustine Prep to open in 2017.

18. School facilities and liability insurance

The middle school hopes to lease a facility on the south side of Milwaukee from MPS. The facility would meet the occupancy requirements of appropriate state codes and must be adequate to serve 320 middle school students under the Carmen middle school educational program model. Given the limited availability of MPS facilities, the Carmen Board of Directors is also evaluating other properties available for lease that would meet the requirements.

The school will carry an insurance portfolio that includes:

- A fidelity bond to MPS
- Indemnification and hold harmless clause for MPS for claims
- Workers compensation and statutory employers liability insurance
- Comprehensive general liability insurance

The school will meet all other MPS non-instrumentality charter contract requirements pertaining to insurance.

19. Effect of charter school establishment on liability of school district

The school will adhere to all state laws and MPS insurance and risk management requirements.

20. School transportation and nutrition policies

The school will work use MPS food services if it is located in a leased MPS facility or will work with a non-MPS nutrition services vendor to provide meals for students if the school is located in a facility leased through another owner.

Transportation will not be provided to students, with the exception of homeless students and any student with an IEP that includes transportation. Parents will be informed of all policies pertaining to transportation and nutrition in writing during the enrollment process and orally at open houses and at individual meetings that take place with all new families once a student accepts a seat at the school.

21. Non-instrumentality status

The south side middle school will be a non-instrumentality charter school.

22. School year length and term of contract

The school will open in late August 2018, and is seeking a five-year contract.