

DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD Charter and/or Charter Agreement Amendment Application

Part I: General Information

All applicants must complete this section

SU	BMI	TTED BY: Dominique Fortune, Board Chai	<mark>r</mark>
SU	BJEC	CT: Charter Amendment Request for	or: (Mark all that apply)
	Progr Grade Grade Addit Goals Missi	Ilment Ceiling Increase ram Replication of Grades Served le Level Expansion (Single Grade) le Level Expansion (Grade Band) tional Facility or New Location s and Achievement Expectations ion or Education Philosophy culum, Standards or Assessments	 Name Change – Campus or Facility Campus Reconfiguration LEA Status for Special Education Special Education Enrollment Preference Governance Structure (Bylaws, Articles of Incorporation or Management) Graduation Requirements Competency-Based Learning Application
SUE	BMIS	SSION DATE: 10/5/2018	
SCF	1001	L BACKGROUND	
		_ ·	y. This information provides helpful background to the DC
	Proda) b)	ovide the following information about your Loc Campus name(s) and location(s): Lee Monte Year opened: 2014	ssori Public Charter School
SCHOOL BACKGROUND Please address the following questions in their entirety. This information provides helpful back PCSB Board as it reviews these requests. Overview of School Performance 1. Provide the following information about your Local Education Agency (LEA) by campus: a) Campus name(s) and location(s): Lee Montessori Public Charter School b) Year opened: 2014 c) Grade levels served (Currently and at maturation of charter agreement, if applicable) growing to PK3-6 th d) Date that charter will be eligible for possible renewal: 5-Year Review in 2018-19 2. Please select the performance indicators below that describe the school's current performance that apply) Currently rated Tier 1, or met at least 2/3 of targets on the most recent PK-only PMF	ation of charter agreement, if applicable). Currently PK3-5",		
	d)	Date that charter will be eligible for possible	renewal: 5-Year Review in 2018-19
2.		•	hat describe the school's current performance*: (Mark all
		Currently rated Tier 1, or met at least 2/3 of Accountability Framework.	targets on the most recent PK-only PMF or Alternative
	\boxtimes	School is not currently under corrective action	on.
	\boxtimes	Has historically met enrollment projections v	n/in 80% of target.
	\boxtimes	School has been in operation for 3+ years.	
		School is currently accredited. Expires June	2020
		the school has multiple campuses or varying Fademic performance of each campus here: n/	

Disclaimer: While processing this application, DC PCSB staff may contact you later to request additional information for the Board's consideration. By submitting this application, you agree to cooperate with DC PCSB staff to ensure your application is processed in a timely manner. For questions, please contact DC PCSB staff person Laterica (Teri) Quinn at (202) 328-2660.



PROPOSAL

Lee Montessori Public Charter School submits to the DC Public Charter School Board this application to amend its charter agreement by changing the item(s) selected above. If approved, this amendment will be effective on______, 20______ (leave blank if this has not been determined).

1. Please provide details on the selected amendment(s) above and describe the requested change(s), including the school's rationale for the proposed changes. Describe any planning that is already underway to prepare for the proposed amendment.

Following a strategic planning process that included extensive consulting with Bellwether Education Partners, in consultation with the Lee Montessori Board of Directors, Staff, Family Teacher Association, Lee Montessori is requesting an increase to our Enrollment Ceiling, in line with the table on Page 6, that would, at scale, increase our total enrollment from 297 to 697. Further, once we have identified a location, we will seek a subsequent amendment to allow us to enroll students at a site in either Ward 7 or Ward 8.

2. How will the proposed amendment(s) support or enhance the school's mission?

Lee Montessori was founded with the mission of closing the Opportunity Gap for DC Schoolchildren. The combination of this continued mission and the current demographic trends in Wards 1-6 lead us (1) to have the desire to open a 2nd campus and (2) compels us to open a second campus in either Ward 7 or Ward 8.

3. While considering this amendment request, DC PCSB staff may review the school's history of board actions, DC PCSB audits, community complaints, enrollment trends, and any relevant data used by DC PCSB to monitor equity in schools. Please describe any DC PCSB audits, notices of concern or other board actions issued against your school in the past 3 years. What was the outcome? Please explain what steps, if any, you've taken to address the concerns that prompted a DC PCSB audit, board action, or community complaint.

The only issues remotely relevant would be the three community complaints received in our first four years of operations. These complaints were addressed directly with the parents involved, and included, as relevant, support from the Lee Montessori Board of Trustees.

4. DC PCSB will review the school's Financial Audit Reviews (FAR) and current financials to determine the fiscal health of the organization. If applicable, describe how the proposed amendment will impact the school's finances. Explain any anticipated expenses for the proposed changes and how the school will finance them. [EXCLUDES the following amendments: Governance, Goals, Mission, Curriculum, Name Changes and Graduation Requirements. If not applicable, write N/A.]

Note: If applicable, in addition to your narrative please attach a proposed 5-year Operating Budget.

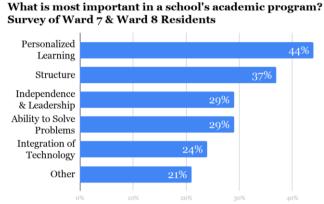
It is a fundamental belief of Lee Montessori that public schools should operate largely off of public funding. As such, it is our objective to leverage the school's current resources, supported by short-term startup funding from philanthropic sources, and other fundraising activities, to cover all expenses related to the startup of a second campus, along with the creation of a network office, including significant increases in staffing, a short-term increase in per pupil expenses to allow for smaller class sizes in the first few years, etc.

5. How has the school informed its external stakeholders (e.g. local ANC commissioners, neighbors) and internal stakeholders (e.g. staff, parents) of the proposed amendment(s)? Please attach any written communication (e.g., meeting minutes). Describe any notable support for or opposition to the proposed amendment(s). If concerns have been brought to your attention, how do you plan to address them? [EXCLUDES the following amendments: Governance, Goals, Mission, Curriculum, Graduation Requirements and Competency-Based Learning Credits. If not applicable, write N/A.]



First, it is our belief that robust community engagement should not begin until (1) an LEA has the approval for expansion and (2) there are potential sites where the school could open. As such, it is our strategy to conduct preliminary outreach prior to the submission of an ECI, followed by robust engagement once an ECI is approved and there is a strong possibility for acquiring/leasing a site. We have already conducted this preliminary work, and look forward to the robust outreach commencing in December 2018.

- √ Early-Stage Outreach to Identify Demand and Support and to Determine Design Principles.
 - a. Interviews with five PCS leaders and one DPCS leader with experience in expansion, Ward 7/8, or both to discuss needs and strategies for implementing educational programs in Ward 7 and Ward 8 and the most critical work needed when replicating.
 - b. Interviewed 69 randomly sampled residents of Ward 7 and Ward 8 to determine their support for our expansion. A key takeaway is that there is strong demand for a school in their neighborhood that supports a personalized, structured program that supports their child's independence and leadership, the hallmarks of a child's experience at Lee Montessori.



- c. Discussed our plans for expansion with current Lee Montessori families, in particular those that reside East of the Anacostia River. Two key themes were that:
 - 1. Our program that focuses on restorative practices and supporting the families with significant needs leads to an improved school community; and
 - 2. Our integration of children with special needs into classrooms in ways that are non-stigmatizing creates a positive environment for all children involved.
- □ **Post-ECI Approval Outreach that focuses on ensuring community support.** Following ECI approval, we will embark on a major effort to ensure that the community in which we might locate is supportive of our school. This work will include the following outreach activities:
 - i. Meetings with Advisory Neighborhood Commissions;
 - ii. Door-to-door and localized contact;
 - iii. Town halls at local community groups;
 - iv. Coordination with Community-Based Organizations and Faith-Based Community
 Organizations;
 - v. Partnerships with local businesses and nonprofit organizations
- **6.** When did your school's board approve the proposed amendment(s)? Please attach minutes from the meeting and vote results.

January 30, 2017



Five-Year Budget Projections

Assuming expansion to 2nd campus starting in the Fiscal Year ending June 30, 2020

Pro	iected	Enrolln	nent
FIU	jecteu	EHITOHI	пепт

Projected Enrollment					
	2	3	4	5	6
	2019-20	2020-21	2021-22	2022-23	2023-24
General Education (Gr	ades PK3-K = I	Primary, 1-3 =	Lower Elemen	tary, 4-6 = Upp	er Elementar
PK3	94	96	109	101	123
PK4	81	89	101	101	106
K	37	70	78	86	87
1	28	34	61	69	77
2	32	26	31	53	62
3	29	29	34	28	48
4	12	26	24	31	25
5	6	11	17	22	27
6	5	4	9	13	19
Total	324	385	464	504	5 74
Special Education					
Level 1	16	20	27	30	36
Level 2	4	5	6	7	8
Level 3	8	8	8	9	g
Level 4	44	47	49	51	52
Total	72	80	90	97	105
Percent of Total	22%	21%	19%	19%	18%
ESL	5	7	8	9	10
Percent of Total	2%	2%	2%	2%	2%
	-	-	•	-	
At-Risk	99	129	170	190	228
Percent of Total	31%	34%	37%	38%	40%
				-	-
Classrooms					
Primary	8	9	9	9	ç
Lower Elementary	4	4	6	7	ç
Upper Elementary	2	2	3	3	3

Revenues

	2019-20	2020-21	2021-22	2022-23	2023-24
General Education	\$4,237,989	\$5,112,975	\$6,190,696	\$6,736,033	\$7,752,860
Special Education	\$1,265,041	\$1,487,522	\$1,758,832	\$1,970,665	\$2,227,066
Facilities Financing	\$1,073,070	\$1,294,225	\$1,583,191	\$1,745,468	\$2,017,712
Total Local Revenues	\$6,576,100	\$7,894,722	\$9,532,719	\$10,452,165	\$11,997,638
Federal Revenues	\$330,227	\$410,620	\$521,959	\$575,529	\$674,858
	•	-			
Private Revenue	\$358,000	\$161,100	\$128,880	\$128,880	\$128,880

Total Revenue	\$7,603,120	\$8,845,377	\$10,593,000	\$11,588,496	\$13,250,960

Expenditures

	2019-20	2020-21	2021-22	2022-23	2023-24
Staff Expenses	\$5,025,929	\$5,604,755	\$6,628,831	\$7,240,749	\$7,923,966
Occupancy Expenses	\$1,161,323	\$1,414,833	\$1,752,615	\$1,939,883	\$2,259,798
Direct Student Expenses	\$973,829	\$1,126,775	\$1,273,001	\$1,385,084	\$1,333,862
Business Expenses	\$396,958	\$433,633	\$497,870	\$525,863	\$577,740
Total Operating Expens	\$7,558,039	\$8,579,995	\$10,152,317	\$11,091,580	\$12,095,366

TICE IIICOIII	Net	Incom
---------------	-----	-------

Total Surplus/(Deficit)	\$45,081	\$265,381	\$440,683	\$496,916	\$1,155,594
	$\Phi \Delta \mathbf{r}_{1} \cdot \mathbf{r}_{2} \cdot \mathbf{r}_{3}$	少としつこうしょ	Φ2121U 1UU 3	0490,910	Q140101010101010101010101010101010101010



Enrollment Trajectory

SY2014-15 through SY2029-30

Enrollment

Grade	2014-15 2	015-16 2	2016-17 2	2017-18 2	018-19	2019-	20	2020	-21	2021-2	22	2022	-23	2023-	24	2024	-25	2025	-26	2026	-27	2027-	28	2028	-29	2029	-30
		,	Ward 5			Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE	Ward 5	SE
PK3	36	36	48	35	36	43	48	42	50	41	68	41	60	48	75	45	66	42	66	47	66	45	66	43	66	46	66
PK4	20	32	33	48	40	40	40	41	48	41	60	41	60	36	70	43	70	40	70	37	70	42	70	40	70	38	70
K	8	18	26	34	44	37		37	32	38	40	38	48	36	51	32	60	38	60	36	60	33	60	37	60	36	60
1	10	11	19	25	31	40		34		34	27	35	34	36	41	34	43	30	51	36	51	34	51	31	51	36	51
2		8	11	17	23	28		37		31		31	22	33	29	34	35	32	37	28	43	34	43	32	43	30	43
3			8	11	15	21		26		34		28		29	19	31	25	32	30	30	31	26	37	32	37	31	37
4				8	10	13		19		24		31		25		26	16	27	21	28	26	27	26	23	31	29	30
5					7	9		12		17		22		27		22		23	14	24	18	25	22	24	22	21	25
6						5		7		9		13		19		22		19		20	12	21	15	22	19	22	18
Total by Campus*	74	105	145	178	206	244	88	265	130	281	195	297	224	297	285	297	315	297	349	297	377	297	390	297	399	297	400
Total - Network						332		395	5	476		521	1	582	2	61:	2	640	5	674	1	68	7	696	6	69	7
Classrooms																											
Primary (PK-K)	3	3	4	4	4	4	4	4	5	4	6	4	6	4	7	4	7	4	7	4	7	4	7	4	7	4	7
Lower Elementary (1-3)	1	1	2	2	3	4		4		4	1	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Upper Elementary (4-6)				1	1	2		2		2		3		3		3	1	3	2	3	2	3	3	3	3	3	3
Total	4	4	6	7	8	10	4	10	5	10	7	11	9	11	11	11	12	11	13	11	13	11	14	11	14	11	14
Students/Class																											
Primary (PK-K)	21.3	28.7	26.8	29.3	30	30	22	30	26	30	28	30	28	30	28	30	28	30	28	30	28	30	28	30	28	30	28
Lower Elementary (1-3)	10	19	19	26.5	23	22.3		24.3		24.8	27	23.5	18.7	24.5	22.3	24.8	25.8	23.5	29.5	23.5	31.3	23.5	32.8	23.8	32.8	24.3	32.8
Upper Elementary (4-6)				8	17	13.5		19		25	,	22		23.7		23.3	16	23	17.5	24	28	24.3	21	23	24	24	24.3
Total	18.5	26.3	24.2	25.4	25.8	23.6	22	25.5	26	26.9	27.9	25.5	24.9	26.3	25.9	26.3	26.3	25.7	26.8	26	29	26.1	27.9	25.8	28.5	26.3	

^{*} Total for Ward 5 campus is our current maximum under our charter. Enrollment by grades is a projection, so the two do not match.

Section A1.

Enrollment Ceiling Increase

*ONLY complete this section if applying to amend Enrollment Ceiling Increase:

A school should apply for an enrollment ceiling increase if it plans to offer more spaces in the next fiscal year and wishes to be paid for the additional students. A school does not need to apply for a change in enrollment ceiling if it is offering the same total number of spaces but not in the exact grade levels it determined through its Schedule I. If applying for an enrollment ceiling increase, please be sure the school meets the criteria listed in the Enrollment Ceiling Increase Policy. Failure to meet the criteria may result in denial of your charter agreement amendment request.

Note: Schools that do not meet all criteria outlined in DC PCSB's Enrollment Ceiling Increase Policy may be asked to provide additional information, such as the following:

- Assessment data other than PARCC (e.g. WIDA, NWEA MAP, IEP goal mastery, etc.)
- School's response to resolving the issue(s), including steps already taken to improve the issue
- Any other information that provides context regarding missed criteria
- **1.** Why is the school seeking this enrollment ceiling increase? How does the school know there is demand for this expansion? How does the scope, pace, and need for the enrollment ceiling increase align with current demographic and growth projections in the city (such as the projections found in this <u>study</u>).
 - Lee Montessori Public Charter School opened its doors to students in August 2014 with the mission of using the Montessori Method to close the opportunity gap while fostering a lifetime love of learning and cultivating independence among DC school children. From the day it opened its doors, the school has developed a strong reputation in the DC community for high-quality academics and a commitment to serving students from all backgrounds. Having completed its fourth year of operations, the school is now looking to begin planning to expand its impact, in particular among children coming from low-income communities in Washington, DC. The school is prepared for this expansion based on the following:
 - a. Strong Academic Model. The school leverages the long-standing Montessori model as the backbone of instruction. To address changes to society since the inception of the model, along with the needs of the populations the school serves, the school has supplemented the model with evidence-based practices including:
 - Reading interventions, such as Guided Reading and DRA;
 - Math interventions, such as small group lessons and incorporating non-Montessori principles;
 - Supports for Children with Special Needs, such as Restorative Practices and Child Study; and
 - School Climate Interventions, such as a school-wide coaching protocol;
 - b. Demonstrated Operational Excellence. From its inception, the school has consistently met or exceeded expectations for school operations. In particular, the school has had clean audits and has met the requirements for Tier 1 expectations for the DCPCSB's Finance & Accountability Review.
 - c. Major Demand from Diverse Families across Washington, DC. With a ratio of applications:seats offered going from ~7:1 in its founding year (2014) to ~30:1 for School Year 2017-18. When looking at these numbers from Ward 7 and Ward 8, this number went from 1.2:1 to ~4:1
- **2.** DC PCSB will review the school's enrollment trends over the past 3 years. What patterns are we likely to find? Is there any context you can provide to explain your current enrollment patterns?
 - a. Describe the impact your school's enrollment ceiling(s), certificate of occupancy, and waitlist/vacant seats have had on your recruitment and program growth.
 - b. Describe ways that your school ensures you recruit, enroll, and re-enroll students with disabilities and English language learners, along with your target population. What methods do you employ to ensure



your curriculum is accessible to all students regardless of race, ethnicity and gender as shown through reenrollment rates?

Given our extensive research and outreach, it is clear that:

- ✓ <u>Demand for Montessori is Strong.</u> In numerous surveys of families in Ward 7 and Ward 8 families consistently indicate that they are looking for progressive forms of education for their children, and indeed the PCSB's own research indicates that "Dual language, expeditionary learning, and Montessori programs are needed as no charter schools in Ward 8 currently offer these options."
- ✓ <u>Demand for Lee Montessori</u>. In the lottery for School Year 2018-19, Lee Montessori received 186 applications from students currently residing in Ward 7 or Ward 8, more than enough to fill the 88 seats we will offer at our 2nd Campus in School Year 2019-20.
- 3. Will the proposed enrollment ceiling increase cause the school to exceed the maximum occupancy load detailed in the school's certificate of occupancy? If so, when and how will the school address this?

 The additional students that we enroll will be served at a second site. Following the identification of a location, we will seek a subsequent amendment for the site.
- **4.** Please include a completed enrollment matrix* with your charter amendment application. Click here for enrollment matrix template.
 - *If requesting an amendment for more than one campus, please complete a separate enrollment matrix for each campus.

^{**}If school is not currently at Maximum Enrollment, please add columns to include all projected school years until maximum enrollment is expected to be reached.



Section A2.

Program Replication*

*(with no changes to grades configuration or curriculum)

**ONLY complete this section if applying for a Program Replication of Grade Levels Served.

DC PCSB will generally approve a campus replication amendment for LEAs that fit the following criteria:

- Have PMF scores of Tier 1 or its equivalent for each PMF related to the LEA for the majority of the past five years, including all existing campuses;
- Are financially viable with sufficient financial standing for the past three years; and
- Are in compliance with all applicable laws and PCSB policies.
- 1. How will the school ensure that the quality of the new campus will be the same as the quality of the existing campus(es)? How will you ensure that quality is maintained across all campuses over time? If the expansion is tied to a takeover or restart, please describe your plan to ensure quality. In your response include:
 - a. Anticipated changes that will be made to your organization structure, including an updated organizational chart.
 - b. Recruitment and staffing plans (including hiring timeline) for these vacancies, including the new principal/academic lead, counselors, and key support staff.
 - c. Professional development and other supports offered to staff at the new campus.

Our entire team has engaged in a robust plan to ensure that the quality of programming continues at our second campus. In particular, we have hired a School Leader that will have spent 18 months training under the guidance of our Founding Head of School and Principal. Further, we have worked to ensure both a reasonable transition for key staff from our founding campus to our new campus. For example, one of our Founding Teachers will transition in January into a Coaching position and will support the instructional quality at our new campus. In addition, we have hired several fully AMI Montessori-trained teachers that will move from "co-teacher" roles into Lead Teacher roles at the new campus.

2. How many students will be served at the new campus and what is your timeline for expansion? NOTE: If the replication will require an amendment to your enrollment ceiling, you also must complete the *Section A1: Enrollment Ceiling Increase* template.

The new campus will open with 88 students in PK3 and PK4, growing to 400 students in grades PK3-6th.

- **3.** Please include a completed enrollment matrix* with your charter amendment application. Click here for enrollment matrix template.
 - *If requesting an amendment for more than one campus, please complete a separate enrollment matrix for each campus.
 - **If school is not currently at Maximum Enrollment, please add columns to include all projected school years until maximum enrollment is expected to be reached.
- **4.** In addition to providing a <u>5-year Operating Budget</u>, please answer the following questions regarding the financial impact of the proposed new campus:



- a. How much does the proposed new campus cost, and how many students will be served at the new site? The new campus will cost \$2.2 million in SY2019-20, growing to \$4.4 million after five years.
- b. What is the school's per-pupil cost, and how does this compare with its per-pupil allowance? Per pupil costs start at approximately \$25,000 in the first year and drop to ~\$18,400 after five years. The latter is in line with our experience at our first campus, with the former subsidized by philanthropic dollars in the early years.
- c. If you plan to operate multiple facilities, in addition to the proposed new campus, what is the LEA's total facilities cost (e.g. lease, plus mortgage)? How does this expense compare with your per-pupil allowance? Given feedback from colleagues in the field, we have budgeted spending 120% of the facilities allowance. We hope to spend a lower percentage of our allowance, but have a conservative plan.
- d. What additional sources of funding do you plan to use to pay for this new campus. We have several requests for additional funding to various philanthropic sources. However, if the philanthropic revenues are not approved, we can adjust our expenditure/revenue mix to support expansion.
- e. If applicable, what contingencies do you have in place in case the new campus enrolls fewer students than anticipated? With fewer students, we will adjust the number of classroom-based positions, along with our network staff.

Note: If you have identified a new location, please also complete <u>Section C1: New Location</u> and submit with this request. If not, please note that you must submit Section C1 when a new location has been identified. Please note that another public hearing will be held once a location has been found.



LEE MONTESSORI PCS BOARD OF TRUSTEES 1/30/17 Board Meeting Minutes

In Person Attendees: Dominique Fortune, Kelly Smith, Djahna Akinyemi, Christina Nagey, Lance Helming, Craig Mccullough, Chris Pencikowski, Beverly O'Bryant and Marimba Johnson. Staff members included Megan Hubbard and Erin Rowsey.

- 1. Call to Order at 6:30pm
- 2. Approved previous Minutes from 11/30/16 Meeting
- 3. Expansion

The board discussed expansion at length and reviewed the Expansion Strategy slides provided by Head of School. Board discussed questions surrounding differences and similarities to current campus, student demographics, actual need for early childhood programming in ward 7 and 8, other schools across nation and outcomes. Board discussed the timeline and overlap with the middle high school developments.

- 4. Adjourned at 8:25.
- 5. Executive Session Meeting took place at 8:30pm.
 - Executive members gave authority to Head of School to continue work in exploring expansion, exploring funding opportunities and next steps with guidance from Board Chair.