

SUBJECT

Wood River Waldorf Methods School DBA Syringa Mountain School New Charter Petition (First Hearing)

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5205

BACKGROUND

Wood River Waldorf Methods School DBA Syringa Mountain School (SMS) is a proposed new public charter school to be located in Blaine County, Idaho. The petition was referred to the Public Charter School Commission (PCSC) by Blaine County School District 61.

DISCUSSION

Syringa Mountain School's petition is for the establishment of a new public charter school with a primary attendance area encompassing the Blaine County school district. The school will serve students in grades 1-5 initially and expand over time to include grades 6-8. SMS will implement an educational program based on Waldorf methods, including teacher looping (where one teacher stays with a class of students for several years to create strong relationships and consistency); developmentally appropriate curriculum sequencing; integration of foreign language, the arts, and a connection to nature; and use of stories, hands-on activities, and projects to engage students in their learning. The Waldorf approach is focused on the whole child, seeking to build students' intellectual, emotional, and physical capacities, and the petitioners have provided significant research demonstrating the success of Waldorf methods at other private and public schools across the country.

The SMS petition includes a well-developed description of an educational program that includes research-proven components, a strong demonstration of a target market, and four viable facilities options. The founders have already begun fundraising and have secured a significant donation for use toward facilities. Interviews and interactions with the SMS founders reveal that all individuals have been active in contributing to this petition and that the diverse backgrounds and expertise of the founders has had a positive impact on the petition and the group's ability to build support in the community.

The petition is well-written and presents strong evidence for consideration; however, the document needs additional revision to Meet Standards on all measures of the Petition Evaluation Rubric (PER) as required by PCSC policy prior to approval. The review completed using the PER includes information about all areas identified for improvement. The following items highlight PCSC staff's key concerns regarding the SMS petition:

1. The goals outlined in Tab 3 need improvement. Some of the goals are identical to proposed MSES, while others are vague. There is no content regarding specific strategies that will be used to meet the stated goals.
2. The MSES, while very close to meeting the standard, need additional clarification / revision.
3. Duplicate (or similar) sections / content in Tab 6 need to be merged.
4. The Business Plan, particularly the sections related to Marketing and Management, need additional development.
5. The transportation and nutrition sections need additional clarification, particularly in regards to how the board will determine if / when to provide services and how SMS will communicate / work with parents when services are not provided.
6. The termination plan needs revision and additional information to meet the rubric standard and include all aspects required by statute.
7. The budget assumptions, budgets, and cash flow need revision (relatively minor) to align to each other and the petition and to correct / clarify certain revenues and expenditures.

Additionally, it should be noted that the Waldorf approach to literacy, as described in the petition, is significantly different than the process commonly used, and may result in slower development of students' ability to demonstrate independent reading skills compared to their peers in more traditional programs. It is possible that this difference could negatively impact standardized test scores and students who transfer out of SMS in the early elementary years.

IMPACT

If the PCSC approves the petition, SMS will be responsible for notifying the State Board of Education of such approval, seeking authorization to begin operations for the 2014-2015 school year, and seeking authorization for LEA status. The PCSC will have 75 days to establish a Performance Certificate with the school.

If the PCSC denies the petition, the petitioners could appeal to the State Superintendent of Public Instruction, or they could decide to not proceed further.

The PCSC may elect to delay a decision on the petition by presenting SMS with a written response identifying the specific deficiencies in the petition. The petitioners would be given 30 days to revise the petition, and the PCSC would have 45 days after receipt of the revision to hold a

second hearing. Pursuant to I.C. §33-5205(2)(c), the PCSC must make its approval or denial decision “based upon whether the petitioners have adequately addressed the specific deficiencies identified in the authorized chartering entity’s written response, or based upon any other changes made to the petition, and upon no other criteria.”

STAFF COMMENTS AND RECOMMENDATIONS

Throughout the petition consideration process, the PCSC should bear in mind that recent statutory changes clarify that “the purpose of the charter petition is to present the proposed public charter school’s academic and operational vision and plans, demonstrate the petitioner’s capacities to execute the proposed vision and plans and provide the authorized chartering entity a clear basis for assessing the applicant’s plans and capacities” (I.C. §33-5205(1)). Future authorizing decisions will be based on the terms of the school’s performance certificate, rather than the charter itself. For this reason, the petition need not address every potential academic, operational, financial, and compliance matter that could arise.

Staff recommends that the PCSC delay a decision and provide SMS with a written response identifying the specific deficiencies in the petition, thus allowing time for further revisions in accordance with PCSC and staff guidance.

COMMISSION ACTION

A motion to approve the petition for Wood River Waldorf Methods School doing business as Syringa Mountain School.

OR

A motion to deny the petition for Wood River Waldorf Methods School doing business as Syringa Mountain School based on item(s)

OR

A motion to delay the decision and direct staff to issue Wood River Waldorf Methods School doing business as Syringa Mountain School a written response identifying the specific deficiencies in the petition, including:

- Items already identified on the Petition Evaluation Rubric and List of Deficiencies included in these meeting materials and
- The following item(s): _____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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PUBLIC CHARTER SCHOOL PETITION EVALUATION RUBRIC

Name of school: Syringa Mountain School Legal Name: Wood River Waldorf Methods School, A Public Charter School, Incorporated

File Number: 2013-01 Date petition originally submitted to PCSC office: 5-17-2013 Date "considered received": 6-13-2013

Date of this revision's submission: 7-16-2013 Date of this review: 8/6/2013

Date(s) of previous review(s) of this petition: 6-17-2013

Means by which petition came to PCSC:

- ☐ Virtual School
- ☒ Referred by School District: Blaine County #61
(Reason: no detailed reasoning provided in the referral letter)
- ☐ Filed by petitioner after withdrawal from school district: _____
- ☐ Transfer of district-authorized charter school: _____
- ☐ SBOE redirected petition for consideration by PCSC

Using the Public Charter School Petition Evaluation Rubric

This rubric provides the Public Charter School Commission with a means of evaluating the quality of the application and communicating its findings to petitioning groups. Quality indicators are provided for each petition component. All components listed in the rubric are required by the PCSC. A petition that sufficiently addresses an indicator will score either a "2" or a "3" for that indicator. Only petitions that score a "2" or above on ALL indicators for ALL components will be eligible for approval.

Current placement on the rubric is represented by yellow highlighting. Additional guidance may be found in the Comments column, as well as the General Comments below each section.

Please see PCSC Policy Section II.B for requirements related to the submission of petitions and petition and revisions.

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ALL ITEMS ARE HYPERLINKED - IN WORD, CONTROL+CLICK TO ACTIVATE

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Cover Page and Table of Contents					
The cover page must include the information listed in IDAPA 08.03.01.401.01. The Table of Contents shall begin on page 2 of the petition pursuant to IDAPA 08.03.01.401.02.					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Cover Page	Cover page does not contain all required elements.		Cover page contains all required elements.	Cover page contains all required elements, is professionally formatted, and clearly reflects the submission date of the current version.	Formatting could be improved to be more readable (division of lines of text, etc).
Table of Contents	Table of contents is poorly organized, incomplete, or inaccurate.	Table of contents contains few, minor errors.	Table of contents is well-organized and page numbers are accurate.	Table of contents is well-organized, with accurate page numbers and hyperlinks to each tab.	Hyperlinks are included in the PDF version of the petition, but not the Word version of the petition (recommended for any future versions).

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General Comments regarding Cover Page and Table of Contents:

PCSC staff has no significant concerns or feedback related to the Cover Page or Table of Contents.

Tab 1					
See IDAPA 08.03.01.401.03					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Executive Summary	Executive summary is not included.	Executive summary provides an incomplete or unappealing case for the school.	Executive summary succinctly introduces: school concept; community need and interest; motivation and collective qualification of petitioning group; and how success of the school will be defined.		The Exec Summary is extensive and generally well done, but it could use some slight reorganization (for logic / flow) and it currently includes content that belongs elsewhere – see in-petition comments for more details.
Mission Statement	Vision statement is not provided.	Vision statement does not express a clear, focused, and compelling purpose for the school.	Vision statement expresses a clear, focused, compelling, and measurable purpose for the school.	Vision statement clearly translates into achievable goals, selected curriculum, operational methods, and school culture.	Though the mission statement does not have content that clearly identifies academic outcomes, when considered together, the vision and

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	Mission statement is not provided.	Mission statement does not focus on educational outcomes or is unlikely to result in increased student achievement.	Mission statement focuses on high-quality educational outcomes as is likely to result in increased student achievement.	Research is cited to support the outcomes and expectations identified in the mission statement.	mission address high-quality educational outcomes (most are included in the vision statement – “rigorous integrated educational program” “well prepared for transition”). Supporting research is provided.
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General Comments regarding Tab 1:

This section has been improved. Please see in-text comments for a couple recommended changes to the Executive Summary. Additionally, I recommend looking at your formatting – the Executive Summary header is clearly the start of the section, but the Mission and Vision headers are different and less obvious (small font, not underlined or centered). Additionally, though not critical, it should be noted that there are confusing / unnecessary font changes within this Tab.

Tab 2					
See IDAPA 08.03.01.401.04					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Proposed Operations	Proposed operations are not addressed or are noncompliant.	Proposed operations are addressed in insufficient details.	Proposed operations are summarized, including: legal status, location, enrollment, student demographics, organizational structure, and educational method.	Proposed operations section identifies where in the petition items are addressed in additional detail.	Proposed operations currently has more information than is necessary (you can summarize here and refer to where the details are later in the petition). However, it includes all required element, thus meeting expectations. Please note that information that is duplicative of Appendix D (details on founders) should be removed.
Potential Effects	Potential effects are not addressed.	Potential effects are addressed in insufficient detail.	Potential effects address the impact of the proposed school on local and neighboring school districts, as well as the community. Demographic and fiscal impact information is included with source material referenced.	Comments from affected districts are included by reference to the appendix.	This section has been significantly improved.

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Target Market	Primary attendance area is not addressed.	Primary attendance area is insufficiently clear or appears inappropriate for the school's targeted mission, enrollment, or demographic.	Primary attendance area is clearly described and appears appropriate.	Map of attendance area is included as an appendix and boundaries are clearly explained. Documentation demonstrates that the attendance area is appropriate.	
	Level of market interest in the school is not addressed.	Level of market interest in the school is insufficient or insufficiently demonstrated.	Petition sufficiently demonstrates and documents interest in and demand for the school.	Aggregate demographic data regarding families interested in enrollment is included by reference to the appendix.	The school has provided a student list; the number of interested families is 75% of their intended enrollment for year one. Additionally, the petitioners have provided additional information (survey of private school families) and letters of support that further demonstrate adequate interest / demand.
Facilities Summary	Petition does not include a facilities summary or references to appropriate appendices with facilities options details.	Petition includes a facilities summary and appropriate references to appendices, but summary is vague or incomplete.	Petition includes a facilities summary and appropriate references to appendices with details. Facilities summary includes basic information about the three facility options.	Petition includes a facilities summary and appropriate references to appendices. Facilities summary includes clear, concise information about the facility options including location and total projected cost, and a plan for how alternative spaces will be identified if any of proposed options become unfeasible.	The facility options summary in the narrative includes more information than is necessary & some info that is repetitive with the facilities details in the appendices. However, since all required information is included, the board provided details for 4 options in the appendices as well as a brief back up plan (in the appendices after facilities Option 4), this item Exceeds Expectations.

Admin Services	Administrative services are not clearly defined.	Administrative services plans are weak or unrealistic.	Administrative services are clearly addressed and appropriate for school size.	Organization chart is provided to illustrate administrative structure.	Administrative services appear to be appropriate. However, the Administrative services section of the petition includes more information than is needed and has content that should be elsewhere (see in-petition comments). An organizational chart is included in the Proposed Operations section earlier in this Tab.
Civil Liability	Potential civil liability effects are not addressed.	Potential civil liability effects require additional clarification or explanation.	Potential civil liability effects on the school, authorizer, and local district(s) are clearly addressed and in compliance with statute.		The liability section is clear in regards to the Authorizer (though the sentence is duplicated in two different parts of the section). However, it still does not address the liability effects on the local district, school, or other entities (SDE, etc.).
Insurance	A list of the types of insurance to be obtained is not provided.	The petition lists the types of insurance that will be provided, but omits one or more required policies.	The petition lists all the types of insurance that must be provided.	The petition commits to obtaining Errors and Omissions insurance, which is recommended but not required.	

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General Comments regarding Tab 2:

Please see in-petition comments for recommended revisions. Please work to prevent duplicate /extra information and to provide information where it is requested (Examples: Proposed Operations has more info than necessary since the details should come later in Tab 5 and Tab 8; Pre-Opening Timeline belongs in Tab 8).

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 3					
See IDAPA 08.03.01.401.05					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Educational Philosophy	Description of “educated person” is not included.	Description of “educated person” does not clearly relate to school’s vision, mission, and/or instructional model.	Description of “educated person” clearly relates to school’s vision, mission, and instructional model.	Description of “educated person” is supported by research.	
	Explanation of “how learning best occurs” is not included.	Explanation of “how learning best occurs” does not clearly relate to the school’s vision, mission, and/or instructional model.	Explanation of “how learning best occurs” clearly relates to the school’s vision, mission, and instructional model.	Explanation of “how learning best occurs” is supported by research.	
Educational Program	It is unclear how the educational program relates to the vision and mission.	The description of the educational program attempts to address its relationship to the vision and mission, but additional development is required.	The description of the educational program directly relates to and supports the vision and mission.		<p>The educational program section is significantly improved and meets or exceeds all expectations.</p> <p>However, it could benefit from additional revision to improve readability and clarity. It includes more content than is necessary, which can create information overload and distract from the essential points.</p> <p>I highly recommend renaming the “Overview of each class” to be the “Curriculum Framework.” Then move the content on individual grades and classes (pages 44 – 51) to the Appendices and add a reference to it at the end of your educational program section (right before the GOALS section).</p> <p>Please see in-petition comments for additional recommendations.</p>
	Educational program fails to offer a choice currently unavailable or insufficiently accessible in the community.		Educational program offers a choice currently unavailable or insufficiently accessible in the community.		
	Description of educational program does not include an explanation of the instructional practices and/or curriculum.	Description of educational program does not provide a clear picture of the school’s plan.	Description of educational program includes instructional practices and curriculum, and illustrates for non-educators how the school will address academics.	Description of educational program is detailed and includes explanations and examples of the instructional practices and types of curriculum to be used.	
	Educational program does not appear to be developed around research-based elements.	Educational program is indicated to be developed around research-based elements, but specifics are not provided.	Educational program is developed around research-based elements and references are provided.	Research-based educational program / elements of program have a record of success in other schools, which will directly assist implementation at the proposed new school.	

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Educational Program (continued)	The petition does not address Common Core and/or the Idaho State Standards.	The petition reflects incomplete understanding of Common Core and/or the Idaho State Standards or fails to address how the school will ensure its educational program will align with Common Core and the Idaho State Standards.	The petition reflects strong understanding of Common Core and the Idaho State Standards and addresses the means by which the educational program will align with Common Core and the Idaho State Standards.	The petition includes a specific plan and timeline for ensuring alignment of the educational program with Common Core and the Idaho State Standards.	
	Curriculum framework is not provided.	Curriculum framework is addressed but incomplete or poorly aligned with mission and goals.	Curriculum framework is clear and aligned with mission and goals.		Since your curriculum framework is lengthy, per the notes above, I recommend referencing it in Tab 3 and moving it to the Appendices. Your other new / revised content acts as an appropriate summary for the curriculum framework.
	Graduation requirements are not adequately addressed.		If proposed school will offer high school grades, petition states that the school's graduation requirements will align with those of the state.		Not applicable; school proposes to open as K-5 and expand over time to be K-8.

Goals	Goals of the educational program are not included.	Goals are poorly stated, too vague or not demonstrative of logical outcomes for the educational program.	Goals convey the overarching outcomes of the educational program and reflect high standards for the target population. Goals and MSES stated in Tab 4 can be logically connected.	Goals are clearly tied to reliable research and data.	Goals in the current petition are either too broad) or repetitive w/ the MSES. I recommend you: 1) Remove the goals that are similar to the MSES. 2) Revise the other goals (that align to the definition of an educated person) so they include clear activities and have set standards for performance (without being too quantitative). For example: <ul style="list-style-type: none">• Reverance & Stewardship, as demonstrated by the completion of community service every year from grades 5 to 8.• Critical Thinking as demonstrated by strong performance on math & reading comprehension portions of school-based assessments and standardized tests.
	Goals do not clearly align with the vision and mission.		Goals clearly align with the vision and mission.		
	Petition does not include stated strategies for reaching identified goals.	Petition includes stated strategies; however, the selected strategies are not well-connected to the educational program or are not backed by evidence of their effectiveness.	Stated strategies for reaching identified goals are clearly connected to the educational program and include research-based components.	Stated strategies for reaching identified goals include research-based components and are demonstrably effective for the target demographic.	Since the petition has a well-developed Educational Program section, please make this new sub-section brief and focused on the specific activities that will lead to the school meeting its goals. For example: <ul style="list-style-type: none">• SMS will facilitate group community service in grades 5 -6 & individual service in grades 7-8.

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Educational Thoroughness Standards	Methods for addressing educational thoroughness standards are not included.	Educational thoroughness standards are addressed, but the means by which they will be fulfilled is unclear or insufficient.	Explanation of the means by which all educational thoroughness standards will be fulfilled includes specific strategies.		
	Methods for addressing educational thoroughness standards do not reflect mission and goals.	Methods for addressing educational thoroughness standards inadequately reflect mission and goals.	Methods for addressing educational thoroughness standards clearly reflect mission and goals.		
Special Education Services	Petition does not state that the school will adopt the SDE's Special Education Manual.		Petition states that the school will adopt the SDE's Special Education Manual.		
	No process is in place to identify special needs students and provide the services they require or plan is non-compliant.	Plan for identifying and serving special needs students is incomplete.	Strong, compliant plan for identifying and serving special needs students is in place and considers the following: IDEA, 504, FAPE, IEPs, and RTI intervention strategies.	Strategies and interventions reflect how special education services will be enhanced by the school's mission.	Your special education content meets standards. However, a change was made between the 1 st and 2 nd reviews, and the Plan for Students who are Academically Low-Achieving, the Plan for Students who Academically High Achieving (GT), and the Plan for English Learners (LEP) all under the header "Special Education Services." Thus, it appears they are a part of your Special Education section, which is not appropriate, so this item is not considered compliant at this time. You should remove the header to separate the sections and make it clear that you are not confused regarding the nature of special education services.
	Staffing allocations for special education are not addressed.	Staffing allocations for special education appear insufficient.	Staffing allocations for special education appear adequate. Plans consider contracting for particular services if necessary.		Staffing allocations for SPED in the Likely and Best Case scenario budgets – in these budgets SMS proposes having 0.5 FTE the 1 st year and increasing to 1 FTE in year 2.

Special Education Services (continued)	Procedures for discipline of special education students are unaddressed or non-compliant.		Procedures for discipline or special education students are compliant and reflect strong understanding of requirements.		
	Transportation plans for special needs students are not included, or are non-compliant.	Transportation plans for special needs students are vague or inadequate.	Appropriate plans to provide transportation services to special needs students are included regardless of services available to other students.		
Dual Enrollment	Plan for working with parents of dually enrolled students is not included, or plan is non-compliant.	Plan for working with parents is incomplete or reflects inadequate understanding of statute and district policies.	Plan addresses how school will inform parents of dual enrollment opportunities and will communicate with all relevant parties. Understanding of statute and district policies is evident.	Petition addresses whether or not non-charter students will be permitted to dually enroll at the public charter school.	

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General Comments regarding Tab 3:

This tab has been significantly improved. Your Educational Program section is now well-developed, though I would recommend some additional revisions, particularly to move some content to the appendices so the narrative is more understandable. More importantly, your goals still need some revision, as some are too vague and others are nearly identical to your proposed MSES. The goals should reflect the big picture, so those that align to your definition of an educated person are appropriate in concept. However, they need to be developed / more specific so you are able to tell when the school is meeting them. Also, you added a "Special Education Services" header above the plans for low-achieving students, high achieving students, and LEP students. While this may seem minor, it makes it appear that you may not understand the nature of special education / which students should receive services.

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 4					
See IDAPA 08.03.01.401.06					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Measurable Student Educational Standards	The petition does not contain MSES that are specific, outcome-based, academically-focused, measurable, and time-specific.	Some or all of the MSES require revision to meet PCSC standards for academic targets.	The MSES meet or exceed PCSC standards for academic targets and address all major academic areas.		The MSES are close, but need some revision to remove unnecessary goals and ensure that the remaining goals are clear.
	The MSES do not appear to reflect the school's mission, vision or previously stated educational program goals.		The MSES reflect the school's mission, vision, and previously stated educational program goals.		

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Measurable Student Educational Standards (continued)	The MSES rely on measurement tools that are not consistent and objective.	Some of the MSES rely on measurement tools that are not consistent or objective; or, it appears the petitioners do not fully understand the measurement tools.	The MSES rely on measurement tools that are consistent and objective. The Five-Star Rating System is used for some of all MSES. Any measurement tools specific to the school's educational model are research-based and demonstrably reliable.		Again, you are close, but more information about your final proposed MSES is needed in order for me to be confident that the measurement tool you will be using is appropriate, consistent, and objective. I know you are planning to use rubrics adapted from those of another school. I have questions about how they have been used by that school and how you plan to use them. I recommend you add an introduction to Appendix AA that provides background about the use of the rubrics by other school(s) and any research behind them (if available).
	MSES do not refer to the Five-Star Rating System or indicate significant lack of understanding regarding how ratings are determined.	Those MSES that refer to the Five-Star Rating System are insufficient to aid the school in achieving an overall rating of 3 or better.	Those MSES that refer to the Five-Star Rating System are appropriate to aid the school in achieving an overall rating of 3 or better.	Use of the Five-Star Rating System in developing MSES reflects strong understanding of how ratings are determined.	The ratings on these items were adjusted based on revised MSES (from exceeds to meets).
	The MSES do not appear appropriate for the target demographic.	The MSES, though intended to be appropriate for the target demographic, fail to meet minimum PCSC standards.	The MSES appear appropriate for the target demographic and meet or exceed minimum PCSC standards.	The MSES reflect a commitment to exceptional growth for all students.	Though the previous MSES set higher targets, it should be noted that the PCSC staff requested that the petitioners adjust their MSES to develop targets that could potentially be used as Mission-Specific measures in the school's Performance Framework.

Methods of Measuring Student Progress	The methods by which student progress in meeting the MSES will be measured are not addressed.	The methods by which student progress in meeting the MSES will be measured reflect limited understanding of the measurement tools.	The methods by which student progress in meeting the MSES will be measured are addressed in a manner that reflects clear understanding of the measurement tools. Other major methods of evaluating student progress (beyond the MSES) are also addressed.	The petition describes diverse, research-based methods by which student progress will be measured and explains how the resultant data will be applied to improve student outcomes.	<p>Please see in-petition recommendations / questions. I recommend you adjust the structure / organization of this section and the one that follows it in your petition, so it is more clear which methods you are going to use to measure student progress towards your MSES progress and the other methods you are going to use internally.</p> <p>Additionally, please see in-petition comments about the use of the Whole Child Rubrics for measuring student progress. I recommend adding additional content (probably in Appendix AA with a reference in the Measuring Student Progress section) that outlines a clear plan for using the Whole Child Rubrics as a measurement tool.</p>
	Plan for annual reporting of results related to MSES is not included.	Plan for annual reporting of results is vague or insufficient.	Plan for annual reporting of results related to MSES is clear and ensures transparency to stakeholders, authorizer, and the public.		See in-petition comments. I think you misunderstood my previous recommendation, as this was moved to a different place than I expected.
	The manner in which students will be tested with the same standardized tests as other Idaho public school students is not addressed.	The manner in which students will be tested with the same standardized tests as other Idaho public school students requires revision.	The petition addresses the manner in which students will be tested with the same standardized tests as other ID public school students and outlines how the school will ensure strong participation.		The petition includes SMS plan to ensure participation in testing. However, "Testing" section was removed, so there is no longer a statement that students will be tested using the same standardized tests as all ID public school stdts. Petition references the Star system, but the broader statement is needed in case ID changes the tests / system.

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Accreditation	Accreditation is not addressed, or the petition does not commit to obtaining such for grades 9-12.	The petition commits to obtaining accreditation for grades 9-12. However, the petitioners appear to lack understanding of the accreditation process.	The petition commits to obtaining accreditation for grades 9-12 and demonstrates a clear understanding of the process.	The petition commits to obtaining accreditation for all grades.	
Accountability and School Improvement	The petition does not demonstrate an understanding of the Five-Star Rating System.	The petition demonstrates limited understanding of the Five-Star Rating System.	The petition demonstrates solid understanding of the Five-Star Rating System.	The petition evidences an understanding of how Five-Star Rating System data should be interpreted and applied at the school, classroom, and student levels.	
	A plan for how the school will respond if it is ever identified as being "in need of improvement" under No Child Left Behind (NCLB) is not provided.	The plan for how the school will respond if it is identified as "in need of improvement" under No Child Left Behind (NCLB) is incomplete or has not been customized to the proposed school.	The plan for how the school will respond if it is ever identified as "in need of improvement" under No Child Left Behind (NCLB) is complete and customized to the proposed school.	The plan includes specific steps that will be taken to avoid the circumstance of being "in need of improvement."	

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General Comments regarding Tab 4:

The organization and flow of this Tab have been significantly improved. Per the recommendation of PCSC staff, the petitioners also developed new MSES in that are SMS-focused and related to the mission, as these can potentially become a part of the schools Performance Framework. These MSES are close to being ready; however, some additional refinement and information around the usage of alternative assessment tools is necessary for them to meet standard. Additionally, the Measuring Student Progress section needs additional revision, and the testing / reporting section should be added back into the petition.

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 5					
See IDAPA 08.03.01.401.07					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Governance	Governance structure is unaddressed or non-compliant.	Description of governance structure is incomplete or inadequate.	Governance structure is well explained and indicates that the board of directors shall be legally accountable for the school's operations. Petition is consistent with Articles of Incorporation and Bylaws.		

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Governance (continued)	Roles and responsibilities of members of the board of directors and administrators are not delineated.	Description of delineation between roles and responsibilities of members of the board of directors and administrators requires development or clarification.	Roles and responsibilities of members of the board of directors and administrators are clearly delineated.	Organizational chart and key job descriptions are provided. Petition defines role of school founders separately from role of members of the board of directors.	The organizational chart is provided in Tab 2.
	Ethical standards for the members of the board of directors are not addressed.	Ethical standards to which the petition refers are vague or inadequate.	Petition includes an ethical standards agreement to be signed by all the members of the board of directors.		Please see in-petition comment- I recommend changing the name of the name you use for the Code of Ethics.
	Transition from founding to governing board is not addressed.	Plan for transition from founding to governing board appears inadequate.	Plan for smooth transition from founding to governing board is clear and likely to be effective. Issues related to avoidance of "founders' syndrome" and ensuring commitment to the mission and vision are addressed.		A section on this transition was added and has most of the key information. However, it is missing thoughts / strategies for: 1) ensuring knowledge and commitment to the mission and vision are passed on, and 2) preventing "founders syndrome"
	Plan for ongoing recruitment of board members is not provided.	Plan for board member recruitment appears unlikely to be effective in securing members with critical skill sets.	Plan for board member recruitment identifies specific qualifications for board members and includes strategies for grooming prospective board members.		The board member recruitment plan is fairly strong but needs clarification. Please see in-petition questions / recommendations (particularly related to the committees non- board members can be on).
	Board training and evaluation plan is not provided.	Board training and evaluation plan is inadequate or lacks detail.	Board training and evaluation plan is detailed and specific, addressing the needs of both the initial and future board members. Self-evaluations will be completed at least annually.	Board training and evaluation plan addresses continuous improvement that includes certification through board training modules for all new members of the board of directors. Plan identifies strategies for improvement based on annual evaluations.	Meets standard; there could be a little more information regarding the board self-evaluation (tool, use of results). Also, there is some info about Board Evaluation ("Board Self Study") in Tab 6 that should be moved to this Tab.
	Commitments to comply with Open Meeting Law and Public Records Law are not included.	The commitments to comply with Open Meeting Law and Public Records law require revision for clarity or accuracy.	Clear commitments to comply with Open Meeting Law and Public Records Law are included.		

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Parental Involvement	No discussion of parental involvement is included.	Described opportunities for parental involvement appear similar to those at most public schools.	Described opportunities for parental involvement exceed those available in most public schools. Petition contains a plan for making parents aware of governance, volunteer, and other opportunities.		
Audits	Commitment to obtain annual, independent fiscal audit is not included.		Commitment to obtain annual, independent fiscal audit is included.		
	Plan for reporting of financial information to authorizer and community is not provided.	Petition provides limited information regarding fiscal transparency and related requirements.	Petition demonstrates a clear understanding of fiscal transparency requirements, including maintenance of an expenditure website.		

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General Comments regarding Tab 5:

This tab has improved and is well-written. However, the new sections on the board transition (from founding to governing) and board recruitment need some additional (but not significant) development.

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 6					
IDAPA 08.03.01.401.08					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Employee Qualifications	Teacher and administrator certification is not addressed.	Petition's statement regarding teacher and administrator certification requires editing for clarity or accuracy.	Petition states that teachers and administrators will be certified in accordance with statute.		
	Petition does not state that all teachers will be Highly Qualified.	Petition's statement regarding HQT requires editing for clarity or accuracy.	Petition states that all teachers will be Highly Qualified.		
	Criminal background checks are not addressed.	Statement regarding criminal background checks is incomplete.	Petition states that all school employees and volunteers in direct contact with students will undergo criminal background checks.	Petition states that all school employees, members of the board of directors, and volunteers will undergo criminal background checks.	

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Employee Qualifications (continued)	There is no plan for professional development and evaluation of staff included in the appendices.	There is a plan for professional development and evaluation of staff included in the appendices, but no reference to the plan is included in Tab 6.	There is a plan for professional development and evaluation of staff included in the appendices, and a reference to the plan is included in Tab 6.		
	Health and safety procedures are not addressed.	General health and safety procedures are outlined; however, additional specificity is required.	School climate is designed to ensure health and safety of students and staff. Specific procedures are detailed and address: drugs/alcohol, suicide prevention, bullying, and disaster preparedness.	School climate is clearly defined and follows best practices or research-based methods for creating safe schools. Specific procedures and staff training plans are detailed.	There are currently 2 Health & Safety sections in different areas of this tab – some of the info in the sections appears to be unique / different, while some is duplicative. This is very confusing. Though it appears that the required information may be there, these sections should be merged and given logical flow in order to make the school's plans and procedures clear (and thus, Meet Standard).
	Procedure for contacting parents and law enforcement regarding suspected use of controlled substances is not included.	Procedure for contacting parents and law enforcement regarding suspected use of controlled substances requires editing.	Procedure for contacting parents and law enforcement regarding suspected use of controlled substances is realistic and implementable.		
	Little or no information and student discipline is provided.	Student discipline section fails to clearly describe classroom management philosophy and methods, as well as disciplinary protocol.	Classroom management philosophy and methods, as well as disciplinary protocol, are clearly explained.	Classroom management and discipline procedures align with the school's mission and vision, and are designed to encourage the development of a positive school culture.	There are currently several sections related to Student Discipline in different areas of this tab – some of the info in appears to be unique / different, while most of it is duplicative. This is very confusing. Though it appears that the required information may be there, these sections should be merged and given logical flow in order to make the school's plans and procedures clear (and thus, Meet Standard).
	Suspension and expulsion procedures are unaddressed or non-compliant.		Suspension and expulsion procedures are clear and compliant.		

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Employee Benefits	Employee benefits are not addressed or are non-compliant.	Statement regarding employee benefits is incomplete.	Petition states that all staff members will be covered by PERSI, federal social security, unemployment insurance, workers compensation, and health insurance.		
Employee Status	Transfer rights are not addressed or are non-compliant.	Statement regarding transfer rights is incomplete.	Petition clearly addresses the transfer rights of charter school employees.		Transfer Rights is covered twice. Please delete the duplicative text on pg 102 (since it should be later in the Tab based on the order in Administrative Rule).
	Collective bargaining is not addressed or non-compliant.		Petition states that staff will be a separate unit for purposes of collective bargaining.		
Employee Contracts	Teacher and administrator contracts are not addressed.	Petition's statement regarding teacher and administrator contracts requires editing for clarity or accuracy.	Petition states that teacher and administrators will be on signed contracts in a form approved by the state superintendent of public instruction.		

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General Comments regarding Tab 6:

Though this Tab may have all of the required elements, there are many sections that are repeated (with content sometimes the same / similar in both places and sometimes different) making it difficult to read and review. Please merge and move sections as needed.

Tab 7					
See IDAPA 08.03.01.401.09					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Admissions Procedures	Enrollment capacity section is absent or addresses only total capacity.	Enrollment capacity section is unclear.	Enrollment capacity section includes total school capacity as well as grade-level capacity.		While your growth chart is clear and meets standards, please see the in-petition regarding a recommended revision to ensure that the growth happens in a manner that is logical in terms of re-enrolling returning students.
	Growth plan is not provided.	Growth plan is unclear or fails to detail plan from year one through final expansion.	Growth plan is clear and complete from year one through final expansion.	Growth plan includes a backup strategy for dealing with lower than expected enrollment.	
	Admissions procedures are incomplete or non-compliant.		Admissions procedures, including timelines, are clearly explained and compliant.		

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Admissions Procedures (continued)	Over-enrollment and equitable selection processes are incomplete or non-compliant.		Over-enrollment and equitable selection processes are complete and compliant.		
	Equitable selection process includes preference groups not allowed by state law, or preferences are listed in the wrong order.		Equitable selection process permits only preference permitted by statute, and the preferences are ordered correctly.	Policies regarding preference groups are included with the petition. (For example, “founder” and “sibling” are defined.)	Though definitions are included, they need revision. Please see the in-text comments regarding providing additional clarification within the sibling definition. More importantly, the definition of founder in your narrative does not match the definition of founder in your Bylaws (the definition in the Bylaws sets clear parameters). Please adjust your narrative so they match.
	Process for development of final selection list is incomplete or non-compliant.		Process for developing final selection list is clear and compliant.		
	Process for renewing final selection list is incomplete or non-compliant.		Process for renewing final selection list is clear and compliant.		
Alternatives	<i>If petition is for a traditional public school applying to convert to a charter school:</i> Public school alternatives are not addressed.	<i>If petition is for a traditional public school applying to convert to a charter school:</i> Public school alternatives are provided, but list is incomplete.	<i>If petition is for a traditional public school applying to convert to a charter school:</i> Public school alternatives are provided and include other charter schools (if applicable) and virtual charter schools.		Not applicable

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Enrollment Opportunities	Process for making citizens aware of enrollment opportunities is unaddressed or non-compliant.	Process for making citizens aware of enrollment opportunities is vague.	Process for making citizens aware of enrollment opportunities is compliant, clearly defined, and includes specific timelines.	Plans include a variety of strategies to inform the public of enrollment opportunities; methods are appropriate for the target demographic and local community.	Per the comment in the previous review, your information is good, but you have duplicative information. You moved the “Process for Public Notification...” section closer to the beginning of the Tab (which is good), but you did not yet merge it with the first paragraph, which is about the same thing. See in-petition comments.
	Plan for denial of school attendance is unaddressed or non-compliant.	Plan for denial of school attendance is incomplete.	Plan for denial of school attendance is clear and compliant.		Your info about denial of attendance was moved to Tab 6 (with discipline). That is where it should be; however, you now need to reference it in the “Notification and Acceptance Process” section. In that section, you currently refer to students not being eligible for admission but then state that you will put them on a wait list. This is confusing – is it referring to students who are not eligible (per the info in Tab 6), and if so, why would you place them on a wait list? Or is it referring to students who were not selected in the lottery process? You should clarify / separate the process for these two different groups of students.

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Student Handbook	There is no draft student handbook included in the petition's appendices.	A draft student handbook is included in the appendices, but the reference to the appendix or the plan for distribution of the handbook is lacking or absent.	A draft student handbook is included in the appendices. Tab 7 includes a brief plan for finalizing and the handbook and ensuring stakeholder access to, and review of, the document. The section includes a reference to the location of the Draft Handbook in the appendices.		
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General Comments:

This Tab has been significantly improved. There are a couple potential areas for improvement, but only one section that should be revised in order to meet expectations. In the Notification and Acceptance Process, some new language was added that is confusing and presents unclear processes for putting students on the waitlist (if not selected in the lottery) and denying attendance (for other reasons, usually related to prior expulsions or severe behavior issues).

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 8					
See IDAPA 08.03.01.401.10					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	Comments
Business Plan: Description	Business description is not provided.	Business description is vague or incomplete.	Clear and well-considered business description addresses both the non-profit corporation and public entity aspects of the school.		
	There is no Pre-Opening Timeline in the appendices or there is no reference to the appendix in Tab 8.		There is a Pre-Opening Timeline in the appendices and a reference to the appropriate appendix in Tab 8.		
Business Plan: Marketing	Marketing plan is not provided.	Marketing plan is vague or incomplete.	Comprehensive marketing plan includes goals, tasks, timelines, expenses, and responsible individuals.	Marketing plan extends beyond the pre-opening year and includes opportunities for partnerships to engage the community with the school.	This section has improved, but needs additional revision for clarity and completeness. Please clarify the Committee's role. Identify marketing goals, and ensure that the timelines and costs for tasks are provided or referenced (even beyond pre-opening). See in-petition comments.

	Strategy for reaching at-risk and underserved families is not provided.	Strategies for reaching at-risk and underserved families are vague.	Strategies for reaching at-risk and underserved families, as well as families that might not be aware of the school, are well developed.	Petitioners have already made efforts to reach at-risk and underserved families. Evidence of interest in the school reflects that these efforts have been successful.	This is close. There are clearly identified strategies for reaching non-English speakers. However, no strategies have been identified to target other groups (at-risk, SPED, etc.).
Business Plan: Management	Management plan is not provided.	Management plan is vague or incomplete.	Comprehensive management plan identifies roles and responsibilities of the board of directors, administration, business management, contractors, and support staff. If a management company is to be used, costs and services are clearly described, and a copy of the proposed contract is included in the appendix.		The management plan needs an introduction to answer the following questions, as they are critical to the management structure and process: How will different entities (board, administrator, staff, contractors, etc.) interact / work together to manage the operations of the school? How will you identify appropriate division of roles and address overlap / issues? See in-petition comments and questions for more guidance.
	The management plan does not include a reference to the appendix which contains board member resumes or the petitioning group list.		The management plan includes a reference to the appendix which contains board member resumes and the petitioning group list.		
Business Plan: Finances	Financial oversight plan is unaddressed or non-compliant.	Financial oversight plan is incomplete or likely to be ineffective.	Financial oversight policies and plans are described and demonstrate understanding of proper fiscal oversight.	Financial oversight plan includes details about the school's intended policies for: budgeting, processing and monitoring of revenue and expenses, and managing cash flow. Plans demonstrate a strong understanding of proper fiscal oversight. Thorough, appropriate financial policies have been adopted by the board of directors.	The financial oversight meets standard in content, but could use some re-organization so that it flows logically and makes more sense. See in-petition comments and questions for more details.

	No fundraising or grant writing plan is provided.	Fundraising or grant writing plan is incomplete, or the budget relies on fundraising/grants to remain viable.	Realistic fundraising and grant writing plan identifies specific strategies, grantors, and goals. However, the budget does not rely on fundraising or grants to remain viable.	Successful fundraising strategy has been enacted. Documentation of guaranteed donations and/or grants is provided.	
Bus Plan: Finances (continued)	Financial plan does not include a reference to appendices where budget and cash flow documents can be found.		Financial plan includes a reference to appendices where budget and cash flow documents can be found.		There are duplicate references – one that is incomplete (pg 131) and then a list that is complete (pg 133) Please delete the first.
Transportation	No plan for the provision of student transportation is in place.	Plan is to add student transportation in future years, but the service will not be offered immediately.	Clear, documented plan is in place to offer student transportation beginning in year two or sooner.	Clear, documented plan is in place to offer student transportation beginning in year one.	The petition states that transportation will be offered in year 2 if fiscally viable. Given that this is a conditional commitment, it leaves a significant questions – How will the board determine fiscal viability? How will transportation needs be addressed in the interim? (There is a reference to reduced cost bus passes but the narrative does not provide adequate info or match the letter provided in the appendices).
	Transportation plan does not consider how the plan (or lack thereof) will impact the ability of all interested families to enroll.	Transportation plan partially addresses how the plan will impact the ability of all interested families to enroll.	Transportation plan includes narrative regarding how the plan will impact the ability of all interested families to enroll, influencing student demographics and school finances.		
Nutrition	Student nutrition is not addressed.	Student nutrition service plans vague or undocumented.	Description of whether and how student nutrition will be provided is clear and documented.	Student nutrition will be provided beginning in year one.	This section was improved with new content, but should be revised to further clarify what circumstances will lead you to having / not having a lunch program and how you will address lunch space and scheduling if you do not have a program.

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	Free and reduced lunch (FRL) eligibility is unaddressed or non-compliant.	Plan for identifying students who are eligible for FRL is unclear or inadequate.	Appropriate plan is in place for identifying students who are eligible for FRL.		
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General Comments regarding Tab 8:

The business plan, particularly the management and marketing plans need some revision in order to be organized, clear and complete. The transportation and nutrition sections need some (relatively minor) additional revision to provide further clarification on your new content.

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Tab 9

The petitioners are not proposing a virtual school; therefore, Tab 9 evaluation measures have been removed from this rubric.

Tab 10					
See IDAPA 08.03.01.401.12					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds – 3	
Business Arrangements and Partnerships	No information is provided regarding services to be purchased or contracted.	Information is provided regarding services to be purchased or contracted, but is incomplete or vague.	List of contracted services and key business partnerships is provided. Supporting documents (draft contracts / letters of intent / MOUs) are included in the appendices and referenced in Tab 10.		The list and description of potential contracted services, relationships, and community partnerships is well done, extensive, and with a strong body of documentation. Well done.
	Community partnerships are not addressed.	Descriptions of community partnerships are vague or uncertain.	Specific community partnerships are described and supported by agreements or letters of support, which are included with other contracts in the appendices.	Community partnerships are integral to the mission and educational program. Such partnerships have been developed and their nature is clearly described.	

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	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Rationale for use of the EMO / CMO is not addressed or appears to be a poor choice for fulfilling the school's mission, goals, or needs.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Rationale requires further development.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Petition provides strong rationale for use of the EMO / CMO, rather than performing the work in-house.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Use of the EMO / CMO will provide unique opportunities and meet goals that could not be achieved in-house.</p>	Not applicable
Business Arrangements and Partnerships (continued)	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Roles of management organization and school board and employees are not addressed.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Roles are not clearly defined, or are inappropriate.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Roles of management organization, school board, administration, business managers, and teachers are clearly defined. Organizational chart indicates employment and supervision relationships.</p>		Not applicable
	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>School board appears to have inadequate oversight and control over school finances, educational program, and/or employees.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>School board apparently retains oversight and control, but no plan is in place for evaluating the management company.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>School board clearly retains oversight and control over school finances, educational program, and employees. Plan is in place to regularly evaluate and redirect EMO / CMO as needed.</p>	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Local, independent school board clearly evaluated multiple management companies and selected a vendor appropriate to meet specific needs.</p>	Not applicable

	<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Tab 10 does not include a reference to an appendix containing the CMO / EMO agreement or contract.</p>		<p><i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i></p> <p>Tab 10 includes a reference to an appendix containing the CMO / EMO agreement or contract.</p>		Not applicable
Termination	Termination plan fails to specify individuals responsible for tasks associated with dissolution.	Termination plan relies on employees for the completion of tasks associated with dissolution.	Termination plan specifies non-employee individuals responsible for tasks associated with dissolution.		It is not clear who will be in charge of termination. In one location, the petition says that the board president will be in charge. In another, it says the board can determine a designee and that the designee may / may not be a board member or Administrator.
	Disposal of assets is unaddressed or non-compliant.	Disposal of assets is generally addressed, but additional detail is required.	Plan for disposal of assets, including responsible individual and timelines, is clear and compliant. Distinction is made between assets purchased with federal and non-federal funds.		
	Payment of creditors is unaddressed or non-compliant.	Payment of creditors is generally addressed, but priorities are not specified.	Payment of creditors is addressed and includes a list of priorities for payment (if permitted by courts). Specific timelines are included.		Payment of creditors is mentioned, but there is no indication of the prioritization of payments (in either the narrative or in Appendix V).
	No plan is in place for completion of final, independent fiscal audit.		Plan is in place for funding and completion of final, independent fiscal audit.		The commitment to complete a final financial audit is included in Appendix V.
	Long term record storage is not addressed.	Long term storage plans are vague or inappropriate.	Plans for secure, long-term storage of records, including student and personnel records, are clear. Process for accessing records will be available to the public.		Please see in-petition comments and questions related to concerns about the proposed storage plans.

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	Student records transfer plan is not provided or is non-compliant.	Student records transfer plan is vague or inadequate.	Process for transferring student records is clear, includes identification of responsible individuals, and will be available to the public.		
	Personnel records transfer plan is not provided or is non-compliant.	Personnel records transfer plan is vague or inadequate.	Process for transferring personnel records is clear, includes identification of responsible individuals, and will be available to the public.		
Additional Info	Additional information is repetitive or unnecessary.		Additional information is new (not repetitive of previous content) and is helpful and appropriate.		Not applicable; no additional information was provided
	Additional information is given in the appendices, but there are no references in Tab 10.		There are appropriate references in Tab 10 to additional information provided in the appendices.		Not applicable; no additional information was provided

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General Comments regarding Tab 10:

Tab 10 has been improved, however, there are still some aspects of the Closure / Termination plan that are unclear and do not address the minimum information required by statute / rule (ie. prioritization of payment of creditors).

Please see the Notes for individual measures above and the in-petition comments and questions for additional details.

Appendices					
The appendices section must include the information listed in IDAPA 08.03.01.401.13. Additional appendices may be included as referenced in other sections of the petition. Appendices should be organized in a logical manner.					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds - 3	Comments
Articles of Incorporation & Bylaws	Articles of Incorporation are not included, or are included but unsigned.	Signed Articles of Incorporation are included but require revision.	Signed Articles of Incorporation, including any amendments thereto, are included as an appendix to the petition.	It is clear that the petitioners understand the nature and purpose of the Articles.	

Articles Incorporation & Bylaws (continued)	Bylaws are not included, or are included but unsigned.	Signed Bylaws are included, but require revision.	Signed Bylaws are included as an appendix to the petition.	It is clear that the petitioners understand the nature and purpose of the Bylaws.	<p>Your Articles of Incorporation and Bylaws are (and should be) two separate documents. So your Bylaws should be titled as such, not titled "Articles of Incorporation: Bylaws". You Bylaws have been significantly improved but could still use additional revision:</p> <ol style="list-style-type: none"> 1) The Bylaws currently start with "SMS, A Public Charter School, Inc. Doing Business As Syringa Mountain School" but your legal name is still Wood River Waldorf Methods School – so your Bylaws should say "Wood River Waldorf Methods School, Inc. Doing Business As Syringa Mountain School" 2) 4.1- Remove Joy Spencer's name since she resigned 3) 4.3- how will candidates be identified? By the board? By a committee? By nomination? Can more than one person be nominated for one board member position? 4) 4.3(e)- do you mean 300 days before the meeting or is this a typo (30?)?
	Bylaws do not address the process by which members of the school's board of directors will be selected.	Bylaws partially address the process by which members of the school's board of directors will be selected. Process for board selection may be addressed, but bylaws lack full clarity and detail.	Bylaws outline a clear process for selection of members of the school's board of directors, including: number and designation of seats, board member terms, elections vs. appointments, nomination and voting procedures, eligible voters, applicable definitions, etc.		

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Elector Signatures	Elector petition and/or documented proof of elector qualifications are not included, or the number of electors is insufficient.		Elector petition and documentation for proof of elector qualifications are included.		
	No members of the petitioning group attended the SDE's Charter Start! Workshop.	Documentation confirms the petitioning group's attendance at the SDE's Charter Start! Workshop. However, only 1 member attended or the attendee(s) is/are no longer actively involved in the petitioning process.	Documentation confirms that at least 2, active members of the petitioning group attended the SDE's Charter Start! Workshop.	Documentation confirms that all active members of the petitioning group attended the SDE's Charter Start! Workshop.	
Board Resumes and Petitioning Group List	Resumes for all members of the school's board of directors are not included.	Resumes provided may be incomplete, unprofessional, or lacking references.	Professional resumes for all members of the school's board of directors are included and provide several references, with contact information, for each board member.	Resumes are accompanied by a brief narrative explaining the individual and collective qualifications of the members of the board of directors, focusing on their capacity to assume responsibility for public funds and the education of Idaho students.	
	Board membership reflects a lack of diverse experience and skills.	Board membership reflects some diversity of experience and skills.	Board membership reflects diverse experience and skills (such as education, law, real estate, management, financial planning, and community outreach). It is evident all members of the board of directors are active in the petitioning process.	Board membership includes experience with charter school leadership.	Interviews and other interactions with PCSC staff have demonstrated that the founding board members have all been active in the petitioning process. Resumes and interviews have revealed the diversity of experience on the board. Though the board membership lacks legal or real estate experience, it is clear that the larger founding group includes individuals and/or parents who are active in providing the board with knowledge and support in these areas. The appendices include a letter regarding pro-bono legal services.

Board Resumes and Petitioning Group List (continued)	A list of the petitioning group, including names and primary roles of persons involved with petition development is not provided.	The list of names and roles of those involved in the development of the petition is incomplete or vague.	The petition includes a list of the names and primary roles of all persons significantly involved with development of the petition, including: founders, members of the board of directors, contractors, employees, and community volunteers. List identifies individuals expected to remain involved with the school during pre-opening and operations.	The board member qualifications summary and petitioning group list should be separate; I recommend moving the board qualifications summary to be the first page in App D. The petitioning group list should be a list of names (a table will work well for this), their role within the group, whether they are currently active, whether you anticipate them being active in the future, and if so, in what role. Example:														
				<table><tr><th>Name</th><th>Currently Active</th><th>Current Role</th><th>Anticipate Future Active</th><th>Future Role</th></tr><tr><td>Mary Gervase</td><td>Yes</td><td>Board</td><td>Yes</td><td>Brd or Employee</td></tr></table>					Name	Currently Active	Current Role	Anticipate Future Active	Future Role	Mary Gervase	Yes	Board	Yes	Brd or Employee
	Name	Currently Active	Current Role	Anticipate Future Active	Future Role													
Mary Gervase	Yes	Board	Yes	Brd or Employee														
Contracts, Leases & Agreements	Contracts, leases, agreements or other documents demonstrating relationships described in Tab 10 (and other sections of the petition) are not included in the appendices.	Documents demonstrating relationships described in Tab 10 (and other sections of the petition) are included in the appendices but are vague or incomplete.	Contracts, leases, agreements, and other documents demonstrating relationships are included in the appendices. Documents are well-organized, clear, and adequate to demonstrate the relationships described in Tab 10 (and other sections of the petition).				Though leases are listed here, you do not need to provide any of the documents related to your potential facilities in this Appendix, provided that they are already in your Facilities Details appendices. Additionally, it would be helpful if you could move some of the letters in this section so that letters about similar items (ie. nutrition) are grouped together.											

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	<i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i> Contract is incomplete or absent.	<i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i> Contract is unclear, or costs appear unreasonable by comparison to services provided.	<i>If a Charter Management Organization (CMO) or Educational Management Organization (EMO), or other management company is to be used:</i> Contract clearly delineates costs and services. Costs appear reasonable by comparison to services provided.		Not applicable
Budget Assumptions & Supporting Documents	Budget assumptions have not been provided or PCSC	Budget assumptions are incomplete or unclear.	Budget assumptions are provided for the pre-opening year, as well as the first three years of operations. The assumptions are complete, consistent with the budgets, and appropriately documented. Budget assumptions are provided on the completed PCSC's Budget Assumptions template.	Budget assumptions include explanations of how the assumptions were developed. A description of what budgetary adjustments will be made if enrollment fails to meet projections is included.	The total amount for furnishings and equipment in the Budget Assumptions (\$69,315.60) does not match the amounts in any of the Pre-Opening Budget scenarios. Also, the staffing allocations note indicates class sizes of 20, 25 or 30, but when the projected enrollment (120, 165, 190) is divided by the teacher FTE (5.5, 6, 6), the average classes sizes would be: 21.8, 27.5 and 31.7 respectively. Additionally, the inclusion of class sizes of 30 does not match the growth table in Tab 7.
Pre-Opening / Start-up Budget	Pre-opening year budget is not provided.	Pre-opening year budget is incomplete, poorly documented, or appears insufficient to cover activities described in the petition.	Pre-opening year budget reflects reasonable expenditures that align with remainder of petition, including: marketing, facilities, staffing, insurance, contractors, memberships, certifications, audits, curriculum, technology, exceptional student services, etc. Revenues and expenditures are supported by documentation.		The Pre-Opening Budget has been improved. However, the pre-opening costs for furnishings and equipment for the likely (\$54,962) and best case (\$64,449) budgets seem high when considered in light of the letter in the appendices with a commitment for furnishings donations. See Note at end of Appendices marked by*

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Pre-Opening / Start-up Budget (continued)	Spending priorities do not clearly align with the stated mission and educational program.	An attempt has been made to align spending priorities with the mission and educational program, but resources allocated appear inadequate to meet pre-opening needs.	Spending priorities align with the mission and educational program and resources. Pre-opening budget is adequate to meet the schools pre-opening needs while also demonstrating thoughtful, conservative budgeting practices.		
Three-year Operating Budgets	Operating budgets for the first three years of operations are not provided, are incorrectly formatted, or are incomplete.	Operating budgets for the first three years of operations are incomplete, poorly documented, or appear insufficient.	Operating budgets for the first three years of operations are provided on the PCSC's template. Budgets are provided for best-case, worst-case, and most-likely-case scenarios. Revenues and expenditures appear reasonable and are supported by documentation.	Five-year budget projections are provided.	Though expenditures for furnishings and equipment may appear high (\$24k per year beginning in Year 2, as reflected in your Likely budget), SMS founders have explained that the amount is a function of additional classrooms and that furnishings and materials may be a bit more costly for SMS than other schools because of the school's commitment to use of green / natural / sustainable materials (which connects to the SMS mission).

Three-year Operating Budgets (continued)	Projected growth appears unrealistic or inadequate to meet long range financial plans.	Growth projections are not clearly supported by realistic data and/or supported by expanded staff and facilities.	Projected growth is realistic, adequate to meet long range financial plans, and supported by expanded staff and facilities.		<p>The enrollment projections in your Best Case budget does not match the growth table you provided in Tab 7, which establishes a 20 student cap for the K classes and a 25 student cap for all other grades. Your budget includes enrollment of 20 students for K and 30 students in other classes. These should match.</p> <p>Additionally, the staffing projections you have used in your Likely and Best Case budget scenarios are concerning in regards to the class sizes that could result, particularly in light of the growth table in Tab 7. Your enrollment / teachers for each budget scenario yields these average class sizes for Year 1, 2 and 3:</p> <p>Likely: 1- 27.5, 2- 26.9, 3- 26.5 Best: 1- 31.7, 2- 31.25, 3- 31</p>
	Spending priorities do not clearly align with the mission and educational program.	An attempt has been made to align spending priorities with the mission and educational program, but resources allocated appear inadequate to achieve stated goals.	Spending priorities align with the mission and educational program and resources are adequate to achieve stated goals.		The majority of expenditures seem appropriate; however, SMS may find it difficult to implement the proposed educational program with class sizes of 27-31 students (as reflected in the budgets).

1 st year Cash Flow	First-year cash flow projection is not provided.	First-year cash flow projection is incomplete, inadequate, or indicates insufficient understanding of public school funding.	Adequate first-year cash flow projection reflects thorough understanding of public school funding.		<p>The Cash Flow shows state apportionment in the revenue section in months when payments will not be received (the early payment should be on the cash flow for Aug, regular payments are in Oct, Nov, Feb, and May).</p> <p>Also, Cash flow is inserted into the appendices in a manner that is unreadable (size & orientation).</p>
Facilities	Specific facility options have not been identified, or too few facility options are provided.	Descriptions of multiple, specific facility options are included; however, detail is insufficient or the facilities may not be adequate to ensure full implementation of the educational program.	Descriptions of three or more realistic facility options are provided with sufficient detail indicating that the facilities are appropriate and sufficient. Facility options are presented using the completed PCSC Facility Options template.	<p>The primary facility option is unusually strong, such as a guaranteed donation of a building or land.</p> <p>Reasonable, well-supported backup options are also included.</p>	<p>Why is there lease info about 100 Mustang Ln in the 3rd Facility Option and lease info about 406 North Main immediately following? For any facility option where you are providing info, you should complete a facility template, or at the very least, provide a cover page that gives basic info (overall cost, size, etc.) about the Other Facilities Being Considered. Otherwise, you should remove these documents (you may inform the PCSC verbally of back-up facilities options).</p>
	One or more of the proposed facilities are not located within the primary attendance area and/or the district by which the petition was referred to the PCSC.		All of the proposed facilities are located within the primary attendance area and the district by which the petition was referred to the PCSC.		
	Timelines for facility completion are absent or unreasonable.	Timelines for preparation of one or more of the facility options are aggressive and may not be attainable.	Reasonable and appropriate timelines for completion of all facility options are provided.	Contingency plans are provided for use in the event that facility preparation timelines cannot be met.	

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Facilities (continued)	Petition does not demonstrate that the facilities is (or can be) in compliance with applicable codes, health and safety laws, ADA requirements, etc.	Petition partially demonstrates that the facilities are (or can be) in compliance with applicable codes, health and safety laws, ADA requirements, etc. However, additional information is needed to ensure compliance.	Petition demonstrates that the facilities are (or can be) in compliance with applicable codes, health and safety laws, ADA requirements, etc.	Certificates to verify compliance and/or written quotes for bringing facilities into compliance are included by reference to the appendix.	
	Pre-opening timeline is not provided using the PCSC's Pre-Opening Timeline Template.	Pre-opening template requires additional development to ensure timely completion of preparation to begin operations.	Complete, pre-opening timeline is provided using the PCSC's Pre-Opening Timeline Template and reflects strong understanding of the steps involved in preparing for operations.		
Staff Professional Development & Evaluation	Professional development plan is not included or is reflects a plan with minimal offerings that is poorly aligned with the mission or clearly inadequate to ensure successful implementation of the educational program.	Petition expresses an intention to base professional development on teacher needs, student progress, and school mission, but plan is vague. Plan needs additional development to ensure successful implementation.	Professional development strategy is thorough, specific, and sufficient to ensure successful implementation of the educational program and fulfillment of the mission. Adequate resources are committed to initial and ongoing professional development.	Professional development plan is sufficient (both in content and resources) to ensure successful implementation and integrates staff feedback and school and staff evaluation data in determining future training needs.	
	Plans for teacher and administrator evaluations are not included or are non-compliant.	Plans for teacher and administrator evaluations are vague or insufficient.	Petition includes clear process for evaluating teacher and administrator effectiveness and using results to improve student outcomes.	Plans for working with underperforming teachers/administrator(s) are included.	

Outreach Activities	Petitioners have not engaged in significant outreach activity.	Past and planned outreach activities may not be adequate to ensure community interest and involvement.	Outreach activities designed to reach a broad audience have resulted in documented enrollment interest and community involvement with school development. Planned outreach is specific and ongoing.		Currently your section shows only past activities and provides articles about the school (which represent your PR efforts, but aren't what we're looking for here, so please move or delete). I recommend providing a one-page document (which can be followed by your flyers, etc. if you feel they are important) that lists the past outreach activities you have done and the future activities you are planning – these should be activities that have put you in contact with the community / potential SMS families (Facebook page established, Q&A sessions in the community etc.). It would be helpful for the document to include the name and nature of the activity (name and very brief description), the date, and the attendance level (if you know it or can estimate it) or attendance goal.
Interested Family List	A list of interested families is not included in the appendices.	A list of interested families is included in the appendices but does not demonstrate an adequate level of market interest based on the school's stated enrollment targets.	A list of interested families is included in the appendices and demonstrates an adequate level of market interest based on the school's stated enrollment targets.	The list of interested families is well organized and detailed, and includes a number of potential students that <i>far</i> exceeds the school's stated enrollment targets.	The number of potential students (123) represents 75% of the target enrollment (likely scenario budget, etc.) for SMS. Additionally, the petitioners conducted a survey to gauge interest and get feedback from the community. Additionally, SMS has provided letters of support from parents and community members.

Student Handbook	Draft student handbook is not provided.	Draft student handbook is incomplete or has not been tailored to the school.	Complete, draft student handbook is tailored to the school.		
Other Appendices	Appendices are poorly organized or lacking critical information.		Appendices are logically organized and include all critical information without providing unnecessary or redundant materials.		

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General Comments regarding Appendices:

The appendices are generally strong, clear, and well-organized. However, there are still some documents that need revision; particularly important are the items related to clarifying / correcting the budget assumptions, Pre-Opening Budget, 3-year Operating Budgets, and Cash Flow.

Please see Notes above for questions and comments on specific appendices.

*NOTE regarding Pre-Opening Budget deficiency: PCSC staff noted that the furnishings / equipment expenditure projections in the Likely and Best Case scenarios of the Pre-Opening Budget appear high (\$54,962 and \$64,449, respectively), particularly given the commitment that SMS has for a furnishings donation. PCSC spoke with SMS founding board members Mary Gervase and Ben Rogers on July 30, 2013, regarding this issue. Mr. Rogers stated that the Pre-Opening Budget that the PCSC currently has was created before the furnishings donation was confirmed, so it does not take the donation into account. SMS will be revising the Pre-Opening Budget to reduce the projected furnishings / equipment costs. However, the PCSC staff evaluated this item based on the documents in-hand (those to be considered at the first hearing), so this is still considered below expectations until it is corrected.

General Quality Indicators					
These indicators apply throughout the petition and the petitioning process.					
	Does Not Meet – 0	Partially Meets – 1	Meets – 2	Exceeds - 3	Comments
Timeliness	Petition and related documents are frequently submitted after deadlines.	Petition and related documents are occasionally submitted after deadlines.	Petition and related documents are submitted in accordance with timelines in statute, rule, and PCSC policy. Exceptions to this are very rare and have <i>advance</i> approval from PCSC staff.	Petitions and related documents are submitted promptly, well in advance of required deadlines.	
Thoroughness	Petition revisions fail to address many concerns and recommendations cited by SDE and PCSC staff. Petitioners attempt to rely on oral assurances in place of written revisions.	Petition revisions address most concerns and recommendations cited by SDE and PCSC staff.	Petition revisions consistently reflect petitioners' best efforts to respond thoroughly to all concerns and recommendations previously cited by SDE and PCSC staff. Revisions are made in the petition document.		

August 15, 2013

Thoroughness (continued)	Some petition revisions are made without the use of legislative formatting.		<p>All petition revisions are correctly marked using legislative formatting.</p> <p>Only revisions made since the last PCSC staff review marked.</p> <p>(Legislative formatting need not be used on budget spreadsheets or when entire appendices are simply re-ordered but not changed.)</p>		<p>In this particular version of the petition, there were numerous instances where legislative formatting was not used or was not used correctly. Issues included: deleting content without showing the deletion; changing (adding / revising) content without showing marking, and moving content without using legislative formatting appropriately.</p>
Professionalism	Petition contains many typographical errors and/or formatting inconsistencies.	Petition contains a moderate, but unacceptable, number of typographical errors and/or formatting inconsistencies.	Petition contains very few typographical errors and/or formatting inconsistencies.	Petition is free of typographical errors and/or formatting inconsistencies.	<p>Typographical errors were minor and not a significant issues. Formatting was a distraction at times; inconsistencies included: formatting ofr headers (main vs. sub-header, etc.), font size and style, margins, and document size / readability. Many supplementary documents (mostly in the appendices) were too small to be read. In at least one instance, a margin issue led to content being too close to the edge and difficult to print and/or running off the page and being unreadable.</p>
	Quality of writing is poor and requires extensive editing.	Writing requires editing for clarity, consistency, and/or grammatical errors.	Quality of writing is clear, consistent, logically organized, and free of grammatical errors.	Writing is exceptionally strong, presenting concepts in a concise, compelling, and error-free fashion.	<p>There were a few minor grammatical errors, but they did not present a significant distraction. Logical order and flow should be improved (particularly with sections being duplicated). Notes regarding sections where this was an issue are provided in the in the appropriate Tabs (above) and/or through in-petition comments.</p>

Professionalism (continued)	Petition is poorly organized and/or contains numerous reference errors.	Petition is reasonably organized and contains few reference errors.	Petition is well-organized and references to other documents, sections, and appendices are accurate. The document includes sufficient electronic “bookmarks” for ease of navigation.		The PDF versions of the petition and appendices include hyperlinks – If you are submitting your petition for an additional hearing, I recommend adding bookmarks and hyperlinks to the Word version of the petition for ease of navigation by the PCSC
	Petition contains text obviously taken from other documents and not reviewed or customized.	Petition contains sections of “boilerplate” text that have not been customized to suit the school.	Petition does not rely on text taken from other documents, except as is appropriate for replication of proven models. Any “boilerplate” sections have clearly been reviewed and customized as necessary.		
Communication	Petitioners did not communicate with the SDE or PCSC regarding questions, updates, or issues in the petitioning process.		Petitioners communicated appropriately and professionally communication with the SDE and PCSC. Petitioners sought out assistance from the SDE and PCSC when needed and kept the PCSC updated during the petitioning process regarding any issues / changes.		
Compliance	Petition format is not consistent with IDAPA 08.03.01.400.	Petition format is mostly consistent with IDAPA 08.03.01.400.	Petition format is consistent with IDAPA 08.03.01.400.		
	Petitioners did not follow the petitioning process as outlined in ID §33-52 and PCSC policy.		Petitioners followed all appropriate steps of the petitioning process as outlined in ID §33-52 and PCSC policy.		

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GENERAL COMMENTS REGARDING THE PETITION

Formatting

First and foremost, it was noted early in the petition and throughout that there were many instances where legislative formatting was not used or was not used appropriately. At times, this appeared to be the result of content being moved from one section of the petition to another. When you move content, you should leave it where it was in your previous version and strikethrough the text in that section to show that it is being taken out. Then add the text where you want it and underline it since it is new to that section. While content being moved was clearly the source of some of the legislative formatting issues, there were also sections where content was deleted without any markup (sections that were in the original petition were deleted and are no longer there) or where content was added but not underlined as new. This makes it difficult for the PCSC and staff to review changes made to the petition. If the petitioners have questions regarding the use of legislative formatting, they should review the Idaho Rule Writers' Manual and/or contact PCSC staff directly.

Other formatting issues: Font sizes and types changed throughout the petition. Headings were formatted inconsistently – main headers, sub-section headers, and level 2 sub-section headers should be formatted the same throughout. Margins also shifted, with some content being difficult to print (because it is too close to the edge) and at least one instance where text ran off the page.

Content

Though the petition needs additional revision to Meet Standards in all areas, it should be noted that it was significantly improved since its initial submission to PCSC staff and when considered overall, it is a relatively strong petition. The educational program, which is clearly outlined in the petition, is well-developed and includes documented research-based components. There appears to be an adequate market in Blaine County for this school. The founders have already begun fundraising and have secured a significant donation for use toward facilities. Four viable facilities options are outlined and appropriate supporting documentation is included. Finally, the founders have demonstrated the development of relationships / partnerships to support the school's mission and educational program.

Though the large concepts of the petition are all strong, there are some areas that need further development and/or clarification to Meet Standards as outlined in the rubric. Each of these deficiencies is shown in the rubric above, and details are outlined in the Notes column (in blue font) and/or in the petition (in red font). Petitioners are welcome to follow-up with PCSC staff with any questions.

August 15, 2013

**Syringa Mountain School
List of Deficiencies identified by PCSC during Review #2**

Tab 2

- Though the liability section addresses the impact on the Authorizers, it does not address effects on the local district, school, or other entities.

Tab 3

- Some of the goals are too broad, making it difficult to ascertain how the school's board and administration will know when the goals have been met.
- There is no section outlining strategies to reach the goals – it can / should be concise, but there need to be clear activities related to the goals.
- In the Special Education Services section, an organizational issue makes it appear that the sections on services for Academically High Achieving / GT, Academically Low Achieving, and ELL / LEP students are a part of the Special Education Services section. They should not be; a simple reorganization will make it clear and bring this to Meets Standards.

Tab 4

- While much improved, some of the Measurable Student Educational Standards (MSES) need additional revision / clarification.
- The “Testing” section which was previously in the petition was removed; this section included a required commitment to test SMS students using the same standardized tests as are used for all Idaho public school students.

Tab 5

- The plan for transitioning from founding to governing board needs additional information (regarding ensuring that knowledge and commitment to the mission is passed along and how SMS plans to prevent “founders syndrome”).
- The plan for board member recruitment needs additional clarification (committees, etc.).

Tab 6

- There is considerable duplication of content / sub-sections in this Tab (though most seems to be identical, some content is slightly different); content needs to be merged.

Tab 7

- The Notification of Acceptance section should be clearer in terms of the different processes for a) students who have been denied enrollment (based on appropriate reasons as outlined in Tab 6 and aligned to statute / rule) and b) students who have not received enrollment in the lottery process and are being waitlisted.

Tab 8

- Business Plan: Marketing needs additional details related to SMS's overall marketing goals, tasks, timelines, and responsible parties. Additionally, strategies for reaching out to specific groups beyond non-English speakers (at-risk, SPED, etc.) could use further development.
- Business Plan: Management needs an introduction that demonstrates how the different entities (board, administrator, staff, contractors, etc.) will interact / work together to operate the school.
- The Transportation section does not include a clear commitment to providing transportation in Year 2 (or sooner); states that it will be provided if "fiscally viable" but does not clarify how this will be determined. Additional detail regarding how transportation will be addressed in the interim will also help.
- The Nutrition section needs similar development to the Transportation section – how will the board determine fiscal viability? How will lunch space and scheduling be addressed if there is not program?

Tab 10

- The Closure / Termination plan needs additional development / clarification in regards to: which person will be in charge of overseeing the closure process (Board President or the designee? Who is eligible to be the responsible designee?), how payment of creditors will be prioritized (this info is required by statute), and SMS's plan for long-term record storage.

Appendices

- Bylaws need revision:
 - Legal name of the school should be on the Bylaws
 - Additional information is needed regarding how board candidates are identified
 - There is a potential typo in 4.3(e) regarding when a proxy vote will be considered (300 days before? Or is it supposed to be 30?)
- Petitioning Group list needs revised to clarify each person's past / current role and whether they are anticipated to continue involvement in pre-opening and/or operations (and in what role)
- Budget Assumptions
 - Some numbers don't match any budget version furnishing / equipment amounts
 - The math seems to be incorrect in regards to class size estimates
 - Class sizes included in the assumptions don't match the caps established in the growth table (Tab 7)
- Pre-Opening Budget
 - The Furnishings / equipment projected costs in the Likely (\$54,962) and Best Case (\$64,449) budgets seem high given the commitment that SMS has for a furniture donation.
- 3-year Operating Budgets
 - Staffing allocations and class sizes in the Likely and Best Case scenario budgets do not match the caps established in the growth table (Tab 7)

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- Classrooms of 27-31 students (per Likely and Best Case budget scenarios) may make it difficult for SMS to successfully implement its educational program
- Cash Flow
 - State apportionment payments are included in the revenue for incorrect months (the months where they are included do not match with the months when they will be received).
- Outreach Activities
 - The documents provided did not provide adequate information – there should be a list (or similar) that clearly demonstrates the past (completed) outreach activities the founders have engaged in, as well as those that are planned.
- General Quality
 - Legislative formatting was not consistently and correctly used
 - There were inconsistencies with formatting and margins – some of these made it difficult to read images and documents (too small) or margins that allowed text to run off the page)

**Idaho Public Charter School Commission
Petition Review
Founding Board Interviews**

Petitioning School	Wood River Waldorf Methods School DBA Syringa Mountain School (SMS)
Dates of Interviews	July 25, July 26, and July 30, 2013
PCSC Staff who Conducted Interviews	Alison Henken, Charter Schools Program Manager
Founding Board Members Interviewed	Mary Gervase
	Don Keller
	Pheobe Pilaro
	Ben Rogers
	Travis Scott
Additional Person(s) Interviewed	Kate McClure, potential future board member

PCSC staff completed interviews with the five founding board members of Syringa Mountain School (SMS). These interviews focused on the members' interest in founding the school, their understanding of board member and authorizer roles, the experience and expertise they bring to the board, their level of understanding regarding school finance and business accounting, and the challenges they anticipate as the school opens.

Our interviews revealed that one board member is a hedge fund and investment advisor; one has a background in environmental sciences, yoga, and healthy living; and three are professional educators. The board brings expertise in administration and teaching, charter schools, business and school finance, and business operations. Several of the founding board members have served on school boards in the past, and one has implemented a Waldorf curriculum as a teacher at a private school. The members all demonstrated a strong commitment to the founding of the school, and all demonstrated that they have had an active role in the petition process. Three of the five board members confirmed during interviews that they would be interested in having their children at SMS if the petition is approved. Though the board appears to be lacking in legal expertise, they have been receiving pro-bono legal support from an engaged community member and have a letter of commitment included in the petition that confirms continued pro-bono legal assistance through the pre-opening phase.

The consensus of the members is that Charter schools provide choice and an opportunity for innovation, research, and scaling of best practices to other schools and districts. They described the mission of SMS as providing a rigorous liberal arts curriculum that integrates Waldorf methodology, is developmentally appropriate, and inspires students to want to learn and develop their unique talents. The Board perceives their role to include providing expertise in their particular fields, fundraising, building community support, and developing a strong foundation for the school's mission, vision, educational program, and operational framework. The level of understanding regarding school finance appears to be strong; in addition to having one founding board member with a strong business-finance background, all board members have had some level of interaction with school finance, either as a school board member or school administrator.

The board members seem to have a fairly solid understanding of the role of the board and the transition between the founding board and the governing board. They described the founding board as focused on establishing the vision and getting the school operating with purpose and a solid identity, while the governing board should ensure the mission and vision are implemented, create policies, and oversee the operations and finances of the school. Each member understands

the value of formal board training and has verbally committed to participate in such training if they transition onto the governing board. The potential challenges they anticipate are adequate enrollment, building strong community support, finances and fundraising (including a capital campaign for a long-term facility), and recruiting and maintaining high quality teachers. Board members perceive the role of the authorizer as being one of oversight and accountability, particularly in regards to the school's Performance Certificate. Additionally, several members believe the relationship between the authorizer and the school should be a partnership; in their opinion, the Authorizer should support the school in working towards high quality and advocate for the duplicating and scaling of best practices across the sector.

Strengths of the board:

- Personal investment
- Role definition
- Finance, education, school board, and charter expertise
- Commitment to training
- Mix of parents and non-parents

Areas of concern:

- Low level of school legal knowledge (this weakness seems to have been addressed, since the board has sought out and received external support)

August 15, 2013

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SYRINGA MOUNTAIN SCHOOL

Cultivating the Head, Heart and Hands

A Petition to Establish a Public Charter School Beginning in August of the 2014–2015 school year. Opening with Grades K–5 the first year and adding additional grades each subsequent year through 8th grade within or near the city of Hailey, Idaho

Available to all Idaho students with a primary attendance area consisting of Blaine County School District No. 61

Submitted to Public Charter School Commission May 17, 2013

Revised and resubmitted July 16, 2013 and August 2, 2013

Contact: Dr. Mary Gervase,
208-720-6327,
Post Office Box 3531, Hailey, Idaho 83333
marymgervase@yahoo.com

Syringa Mountain School does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs, including vocational programs, in accordance with Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Educational Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended. Any variance should be brought to the attention of the administration through personal contact, letter, phone, or mail.

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Appendices and letters of support under separate cover.

ACKNOWLEDGEMENTS

We were most fortunate to incorporate so many ideas and practices from others who have gone before us to show us the way. We aspire to create a school modeled on your good work. Thank you.

The Mountain School, Kate Woods and the Woods Family who began this journey for all of us!

Desert Star Charter School, Journey School, a Public Charter School, Mountain Sage Community School, Palouse Prairie School of Expeditionary Learning, Sage International School of Boise, The Sage School, Tomorrow River Community Charter School, Waldorf School of Cape Cod, Waldorf School of Baltimore, Wisteria Charter School, Yuba River Charter School, Michelle Clement Taylor, School Choice Coordinator, Idaho State Department of Education, Dr. Nick Hallett, Commissioner, Idaho State Public Charter School Commission and Idaho Capacity Building Project and Don Keller, Principal, Sage International School, Alison Redman Henken, Public Charter School Commission Program Manager, Mike Schlatter, Randy Flood, Dale Bates, Svea Grover and so many others.

Our sincerest gratitude.

SMS Founders: Ben Rogers, Joy Spencer, Travis Scott, Phoebe Pilaro, Greg Bloomfield, Don Keller

TAB 1 EXECUTIVE SUMMARY, VISION AND MISSION STATEMENTS

EXECUTIVE SUMMARY

Wood River Waldorf Methods School, a Public Charter School, Inc, Doing Business As (DBA) Syringa Mountain School, is answering the call from Wood River Valley Families to provide a unique, rigorous, holistic, free, public school of choice to all families who choose it. Slated to open August 2014, this will be the **first** public Waldorf charter school in Idaho and the **first** public school of choice in the Wood River Valley.

What is Syringa Mountain School? It is a K-8 public school choice that

- ✓ Nurtures the intellect, imagination, and emotional life of each child.
- ✓ Offers a rigorous, relevant, balanced, and memorable liberal arts education.
- ✓ Incorporates sustainable living practices and experiential learning through daily animal husbandry and gardening skills.
- ✓ Infuses academics with singing, painting, drawing, flute, violin, storytelling, handwork, and drama.
- ✓ Touches children's hearts and kindles their imaginations.
- ✓ Inspires children to live engaged and successful lives, prepared to meet the demands of their world

What is Waldorf education?

Waldorf education is the fastest growing independent educational movement in the world. In the U.S. alone, there are over **50 public Waldorf charter schools** and 129 private schools. Approximately 1000 Waldorf schools and 1,600 Waldorf early childhood programs span 91 countries and five continents. Waldorf education is truly global, not only in its scope, but also in its approach.

While many Waldorf schools are private, The George Lucas Educational Foundation reported in 2009 that the number of public schools inspired by Waldorf educational methods is growing fast, fueled in part by the passage of the No Child Left Behind Act and the charter school movement. **1**

This educational model is a compelling public education option, incorporating new and different research based strategies that improve and enhance both student achievement, cognition and social emotional health.

Offering a “Waldorf-inspired, liberal arts and arts integrated education designed to promote the growth and development of the whole child, and incorporating sustainable living practices and experiential learning in a K-8 public school setting. Our school fosters the intellect, nurtures the imagination, and recognizes the emotional life of each child. Our aim is to inspire children to live engaged and successful lives, prepared to meet the demands of their world.”

The philosophy of Syringa Mountain School is founded upon the conviction that children are innately curious about themselves and the world; they inherently want to learn, discover, and create. The role of the school is to nourish and guide this natural exuberance, energy and delight in the quest for meaning and knowledge. Creative approaches in which the arts are integrated into academic learning serve to wholly engage the child and provide an experiential, multi-sensory context for understanding intellectual concepts. The experiential study of world cultures enriches the student's expanding world-view, giving an appreciation for diversity, flexibility of thinking, and an intrinsic empathic understanding of social and cultural issues. The school's overall educational approach is designed to instill in its students not only high standards for academic achievement and civic responsibility, but also a sustaining degree of intellectual curiosity, creative thinking, problem solving and creative self-expression, as well as valuable interpersonal and intrapersonal life skills. Class teachers stay with the same group of Waldorf students, advancing through the grades for multiple years, allowing for trusting relationships to be established and true mentorship to take place.

The Waldorf-inspired approach to education recognizes that certain capacities emerge in students at fairly predictable stages, while also allowing for individual rates of maturation and uniqueness. This appreciation for the metamorphosis of comprehension underlies both the organization of the curriculum and the changing methods of teaching. Classrooms, materials used and curriculum cultivate a sense of beauty, wonder and deep respect for the natural world, affirming that the intelligence and imagination of the young child is best developed without the use of technology; up to grade six computer technology is used only as a practical necessity for computer based testing, library and research purposes. Learning a second language begins in first grade. The joy of music enhances cognitive development throughout all of the grades. Cooperation and self-advancement is encouraged rather than outwardly directed competition. The goal of this educational experience is to enable students, as fully as possible, to freely choose and realize their individual path through life. The school community is further connected through optional seasonal programs and festivals.

What does the research say?

There is a growing body of research substantiating Waldorf practices and curriculum and their holistic, balanced approach to education. Although research is cited throughout this document, these studies are indicative of this growing research pool.

In a recent study, 2011, public Waldorf schools were compared to traditional public schools using their district standardized test scores in Reading and Math. Test score results suggested the Waldorf experience provided a slower academic build-up resulting in lower test scores in Kindergarten and the early primary grades followed by higher levels of advanced performance by the 8th grade.²

Waldorf students are less exposed to standardized testing; such tests are generally absent or minimal in the elementary school years. Despite this, U.S. Waldorf pupils' SAT scores have usually come above the national average, especially on verbal measures.³ Studies comparing students' performance on college-entrance examinations in Germany found that as a group, Waldorf graduates passed the exam at double to triple the rate of students graduating from the state education system,⁴ and that students who had attended Waldorf schools for their

entire education passed at a much higher rate (40% vs. 26%) than those who only had part of their education at a Waldorf school.⁴ Educational successes of private Waldorf schools may partially reflect the social status of their students.⁵

In "Learning from Rudolf Steiner: The Relevance of Waldorf Education for Urban Public School Reform," a study published in 2008 in the journal *Encounter: Education for Meaning and Social Justice*, researcher Ida Oberman concluded that the Waldorf approach successfully laid the groundwork for future academics by first engaging students through integrated arts lessons and strong relationships instead of preparing them for standardized tests. In her assessment of four California public schools that use Waldorf methods, Oberman found that students tested below peers in language arts and math in the second grade, but they matched or tested above their peers in the same subjects by eighth grade.⁶

A 2009 study comparing Waldorf and public school students in New Zealand found that the Waldorf students, who had no formal instruction in reading in pre-school or kindergarten, caught up in reading ability by around age 10, at which point there was "no difference in reading achievement between children who had been given early instruction in reading and those who had not".⁷

Despite their sometimes lessened exposure to standardized testing situations, U.S. Waldorf pupils' SAT scores have typically come above the national average, especially on verbal measures. See Todd Oppenheimer's "Schooling the Imagination" article in Atlantic Monthly, Sept. 1999, for detailed analysis.⁸

"Our findings from the QCA suggest that public Waldorf schools are able to provide a more holistic experience for their students, while giving them the ability to be ultimately successful in academics over the course of a K-8 education. This study draws into question the value of early test scores as predictors for later performance for students in Waldorf schools. Based on our data, early test scores provide poor predictive value as to the quality of education of Waldorf students are receiving at least as measured by test scores and national rating scales. This lack of correspondence of test scores to qualitative measures of schools performance should be a considerable concern for policy makers who support testing in the early grades. If we are to gauge schools based on test scores then these tests should at least be reliable measures of student outcomes in later grades. If not, then we must question the expense, time and stress of testing at all. Until reliable measures of school quality are available, the impact of testing should be minimized, especially in the lower grades" (Larrison, 2012).

There are some font changes in the section below

European schools Waldorf research

A 2008 report by the Cambridge-based *Primary Review*, found that "educational alternatives, including Steiner-Waldorf schools and home schooling, produce better academic results."⁹

A 2005 UK Department for Education and Skills report noted significant differences in curriculum and pedagogical approach between Waldorf/Steiner and mainstream schools and suggested that each type of school could learn from the other type's strengths: in

particular, that state schools could benefit from Waldorf education's early introduction and approach to modern foreign languages; combination of block (class) and subject teaching for younger children; development of speaking and listening through an emphasis on oral work; good pacing of lessons through an emphasis on rhythm; emphasis on child development guiding the curriculum and examinations; approach to art and creativity; attention given to teachers' reflective activity and heightened awareness (in collective child study for example); and collegial structure of leadership and management, including collegial study. Aspects of mainstream practice which could inform good practice in Waldorf schools included: management skills and ways of improving organizational and administrative efficiency; classroom management; work with secondary-school age children; and assessment and record keeping.¹⁰

A 2006 PISA study of Austrian students found that Austrian Waldorf students are above average in science. The Waldorf students did best in understanding the questions raised by science and the ability to solve scientific problems and were also above the OECD average for their joy and interest in science.¹¹ The authors concluded "The relatively high expertise in science among Waldorf students, in combination with their very high motivation and interest in these subjects, as well as the various pedagogical principles, suggest that regular schools can learn from the Waldorf schools, particularly with regard to concrete application to the sciences."¹²

Creativity

A study comparing the drawing ability of children in Steiner/Waldorf, Montessori and traditional schools concluded that "the approach to art education in Steiner schools is conducive not only to more highly rated imaginative drawings in terms of general drawing ability and use of color but also to more accurate and detailed observational drawings,"¹³ while another study found that Waldorf pupils average higher scores on the Torrance Test of Creative Thinking Ability than state-school students.¹⁴

At Risk Students

The Thomas E. Mathews Community School in Yuba County, California serves high-risk juvenile offenders, many of whom have learning disabilities. The school switched to Waldorf methods in the 1990s. A 1999 study of the school found that students had "improved attitudes toward learning, better social interaction and excellent academic progress."¹⁵ This study identified the integration of the arts "into every curriculum unit and almost every classroom activity" of the school as the most effective tool to help students overcome patterns of failure. The study also found significant improvements in reading and math scores, student participation, focus, openness and enthusiasm, as well as emotional stability, civility of interaction and tenacity.¹⁶

Ida Oberman, author of *The Waldorf Movement in Education from European Cradle to American Crucible 1919–2008*, is so convinced that Waldorf holds answers for urban school reform that in August she launched a Waldorf-inspired school of her own: the Community School for Creative Education in nearby Oakland, California, now in its second year of operation (Oberman,2010)

While most Waldorf schools are elementary, the Bill & Melinda Gates Foundation helped launch the first public Waldorf high school four years ago at the George Washington Carver School of Arts and Science in Sacramento, California. Test scores have since risen dramatically: In 2008, 67 percent of 11th-graders scored “far below basic” or “below basic” in English; in 2011, just 12 percent did.

The most comprehensive research to date on North American Waldorf graduates spanned 60 years of US and Canadian Waldorf high school graduates, from 1943-2005 produced these results. [17](#)

The images (below) are difficult to read – can you make them bigger / clearer?

US Colleges and Universities from which Waldorf Alumni/ae Have Most Frequently Graduated	
1. Oberlin College (including music conservatory)	11. St. John's College
2. Hampshire College	12. Temple University
3. University of California, Santa Cruz	13. Vassar College
4. Prescott College	14. Wesleyan University
5. Bennington College	15. Adelphi University
6. University of California, Berkeley	16. Amherst College
7. Earlham College	17. Boston University
8. Emerson College, Boston	18. Bowdoin College
9. Harvard University / Radcliffe College	19. Brown University
10. Smith College	20. Cornell University

Source: Research Institute for Waldorf Education

Waldorf Graduates Exceed General US Population in Humanities & Science Majors			
Declared Majors	General US Population 1991-2002	Waldorf Graduates 1991-2002	Waldorf Graduates Relative to General US Population (Likelihood Multiplier)
Arts & Humanities	14.6%	39.8%	2.7 x
Social & Behavioral Sciences	10.9%	29.9%	2.7 x
Life Sciences	6.2%	9.9%	1.6 x
Physical Sciences & Math	2.0%	2.8%	1.4 x
Engineering	6.4%	1.8%	0.3 x
Computer & Information Sciences	6.1%	2.5%	0.4 x
Education	7.3%	2.1%	0.3 x
Business & Management	19.3%	4.6%	0.2 x
Health	11.6%	5.6%	0.5 x
Other Technical & Professional	9.7%	0.4%	0.0 x
Vocational, Technical, & Other	5.9%	0.6%	0.1 x

Source: Research Institute for Waldorf Education

Perhaps the most significant support for Waldorf education comes from an unlikely source, findings from the brain sciences and the emerging field of Mind, Brain and Education (MBE). MBE is a program cofounded by one of the central figures in modern holistic approaches to education, Howard Gardner. The primary goal of this initiative as defined by another of the founding members, Kurt Fischer is “to join biology, cognitive science, development, and education in order to create a sound grounding of education in research” (Fischer, 2009, p. 3). MBE is a growing field that holds promise for holistic educators (Sousa, 2010; Tokuhamma-Espinosa, 2011) and is especially compatible with Waldorf education. . . 18

These results support further investigation into the Waldorf approach and indicate it may have potential for guiding pedagogy towards a more holistic approach in public education. Future research should examine the emergence of cognitive capacities such as creativity, flexibility, and innovation specifically in students participating in public Waldorf schools. Syringa Mountain School is working with Boise State University and the Pesky Learning Center to provide this research base as the school is launched (Appendix E).

The section below feels like it belongs in the educational program. You have already provided plenty of content in the Executive Summary about the Waldorf approach and the research that backs it; this is getting into more details than necessary.

Some highlights of the Waldorf approach to teaching:

Music, art, and movement are greatly employed in the learning process. Those emphasized are dance/eurythmy, water colors, flute/recorder and in later years violin/cello, songs in the round, knitting and crocheting, wood carving and nature crafts.

- Story-telling is used to awaken imagination, build vocabulary and oral language, retain attention and teach subjects such as math, history, geography, social studies, writing and reading.
- Emphasis is put on nature and environmental stewardship. Children will spend much time outside exploring the world around them gaining a deeper understanding of science and nature studies.
- Children are taught real-life tasks such as housekeeping, cooking, fiber arts and gardening.
- Technology is de-emphasized in the early years at school and at home. Parents of enrolled children will be expected to greatly limit their children's exposure to computers, TV, and video games.
- Spanish immersion begins for students in first grade.
- Teachers follow their students from first grade until middle school. This allows teachers to develop a stronger relationship with their students, giving them the knowledge to create curriculum based on their students' needs and strengths.
- Main lessons (which include all traditional subjects) are typically taught in 6 week sessions. Children gain a deep and personal relationship with the material therefore retaining it longer.
- Seasonal studies and festivals are taught and celebrated throughout the year.

The Waldorf method of education offers an academically rigorous curriculum presented in a developmentally appropriate and arts-integrated context. By combining elements of a traditional Waldorf curriculum, sustainable living, and Idaho State Standards and Core Standards, students will excel academically and transition gracefully into upper level public high school settings.

Why the Wood River Valley?

Current research continues to add greater credence to this unique three dimensional, well rounded view of human development- the development of children's mental, emotional and physical capacities; also called thinking, feeling and willing; heart, head and hands. Utilizing this cutting edge research, Syringa Mountain School intends to serve as an education innovation incubator for the Blaine County School District and other Idaho school districts.

While the Blaine County School District provides a number of excellent educational choices to parents and families ~~in our area~~, Syringa Mountain School proposes a significantly different educational choice that is not presently available and is in demand both locally, nationally and internationally. ~~It will expand enhance the variety of educational choices that the Blaine County School District offers to its families.~~ The Syringa Mountain School, will educate children of the Wood River Valley with a Waldorf inspired curriculum, a biodynamic farm experience and an empowering wilderness skills program, thanks to a cadre of committed and visionary staff and parents. The school will initially offer Kindergarten through 5th grade classes, expanding through 8th grade as the school population grows.

Typically, Waldorf education is only available in private school settings, accessible only to those in the upper economic echelon of our society. We strongly believe that education inspired by Waldorf methods and curriculum should be made public and tuition-free so that all who wish to attend have the option to do so, regardless of their socioeconomic status. In this way, we can ensure social justice in school choice. In addition, Hailey, Idaho is the ideal home for a public school where Waldorf and sustainable living methods are practiced; Syringa Mountain School reflects and represents the values of a growing population in our community.

The "Waldorf or Waldorf-inspired?" section and the "Where did the idea for the school come from?" sections seems like they should be moved to be with the other Waldorf information (earlier in the Executive Summary, probably before the Research section).

Waldorf or Waldorf-inspired?

The term "Waldorf" is trademarked, protected and available for use only by private education institutions, with guardianship held by the Association of Waldorf Schools of North America (AWSNA). The use of standardized and required testing, as well as the removal of certain aspects of traditional Waldorf curriculum and practices, means that Syringa Mountain School is not a true Waldorf school, and thus, cannot claim to be one in title. The rise of public, charter schools inspired by Waldorf methods and curriculum is leading to the possible development of criteria through which public, Waldorf-inspired charter schools could become accredited. The Alliance for Public Waldorf Education, of which Syringa Mountain School is a member, is the primary support network and advocacy group for Waldorf-inspired charter schools in the United States. SMS intends to continue its membership with the Alliance for Public Waldorf Education, remaining informed about future developments in this regard.

Where did the idea for the school come from?

Our vision for a charter school using Waldorf-trained teachers and Waldorf methods began three years ago. The Wood River Valley is home to one of only two Waldorf schools in Idaho. For the past 7 years, a non-profit private school located in Bellevue, Idaho, The Mountain School has educated children of the Wood River Valley. With the downturn in the economy over these past three years, the school is slated to close its doors. A group of interested, passionate and active parents and staff began to investigate founding a public Waldorf school that would bring this methodology into the public arena. Through their research, they uncovered the national burgeoning public Waldorf charter school movement and began communicating with schools in Colorado, California, Washington and Oregon. Recognizing that traditional school settings work well for most children but not all, this group is now presenting this petition to diversify the educational opportunities for students and parents in the Wood River Valley through establishing Syringa Mountain School. The results of a survey of prospective students (**Appendix O**) have produced 142 interested students (125 K-5, and 17 preschool). **76** names of registered voters (**Appendix B**) is an indication of the broader community interest and support for this school choice.

Who Syringa Mountain School will serve

Syringa Mountain School is planned to open the fall of 2014, with students in Grades K–5 the first year and adding additional grades each subsequent year through 8th grade. The school will be located within or near the city of Hailey, Idaho. The school will be available to all Idaho students with a primary attendance area consisting of Blaine County School District No. 61. Syringa Mountain School does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs.

The growth table (below) does not need to be in the Executive Summary, since it's in Tab 7.

Syringa Mountain School probable or expected enrollment and growth (maximum numbers per grade)

Year:	1	2	3	4	5	6	7	8	9
K (half-day)	20	20	20	20	20	20	20	20	20
K (full-day)	20	20	20	20	20	20	20	20	20
1st Grade	25	25	25	25	25	25	25	25	25
1st Grade		25	25	25	25	25	25	25	25
2nd Grade	25	25	25	25	25	25	25	25	25
2nd Grade			25	25	25	25	25	25	25
3rd Grade	25	25	25	25	25	25	25	25	25
3rd Grade				25	25	25	25	25	25
4th Grade	25	25	25	25	25	25	25	25	25
4th Grade					25	25	25	25	25
5th Grade	25	25	25	25	25	25	25	25	25
5th Grade						25	25	25	25
6th Grade		25	25	25	25	25	25	25	25
6th Grade			25	25	25	25	25	25	25
7th Grade				25	25	25	25	25	25
7th Grade					25	25	25	25	25
8th Grade						25	25	25	25
8 th Grade							25	25	25

Total	165	215	265	315	365	415	440	440	440
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How student and school success will be defined

Syringa Mountain School will provide an exceptional, time-tested and research-based, educational experience for students. By supporting the local need for Waldorf methods and sustainability in a public school setting, the school will inspire and educate families in our area. We define success to include:

- **Achieve a three star rating or higher through the Idaho State Department of Education Statewide Accountability Rating System.***
- **Educate students able to compete academically with their public education counterparts.** By the end of 8th grade, SMS students will equal or surpass their counterparts as measured by State assessments.
- **Institute a Thriving and Complete Waldorf-Inspired Program (pre-K - 8):** Ensure that all Waldorf-inspired programs are in place and thriving, and that all teachers are Waldorf-trained.
- **Model of Financial Stability:** Create the conditions for a productive and stable revenue flow to the school, ensure that teachers and staff are fairly compensated, all programs are properly funded, and a school campus is affordably financed.
- **Foster Effective Communication within our School Community:** Develop systems and mechanisms to enhance communication within the school community.
- **Nurture an Engaged, Waldorf-Inspired Community Committed to Sustainable Volunteerism:** Organize and promote the active participation and collaboration of parents and others in a way that taps but does not exhaust all parents in the community.
- **Design and Build a Beautiful, Eco-Friendly Campus:** Ensure that the new campus is built to enhance and teach about sustainability, and that it contains all the spaces needed to advance a vibrant, Waldorf-inspired curriculum.
- **Involve SMS within the Blaine County Community:** Reach out to the broader community to 1) enhance the school's image, 2) broaden its funding base, and 3) increase mutually beneficial collaborations and partnerships, 4) expand the uses of the school campus making it available to community groups and schools and 5) educate county residents about the merits of Waldorf-inspired education.
- **Create a Biodynamic Farm and Wilderness Education Program:** Develop a farm-based curriculum that teaches the principles of biodynamic farming, and that uses the school campus for hands-on farming and wilderness skills experiences for all students.
- **Inspire** children to live engaged and successful lives, prepared to meet the demands of their world as educated and responsible human beings.

*In addition to the State growth and achievement measures, student achievement will be additionally measured and evaluated using the variety of methods indicated by the Waldorf education model such as whole child rubrics, portfolio reviews, parent teacher conferences, and narrative report cards.

These multiple measure, formal and informal approach to assessment is a critical component to schools employing Waldorf methodology. In a recent study, public Waldorf schools were compared to traditional public schools using their district standardized test scores in Reading and Math. Test score results suggested the Waldorf experience provided a slower academic build-up resulting in lower test scores in Kindergarten and the early primary grades followed

by higher levels of advanced performance by the 8th grade.² This study as well as numerous earlier studies, suggest that public Waldorf schools are able to provide a more holistic experience for their students, while giving them the ability to be ultimately successful in academics over the course of a K-8 education.

These results support further investigation into the Waldorf approach and indicate it may have potential for guiding pedagogy towards a more holistic approach in public education. Future research should examine the emergence of cognitive capacities such as creativity, flexibility, and innovation specifically in students participating in public Waldorf schools. As holistic education grows in the public sector, there is the need to support the approach as reliable and valid. SMS is working with Boise State University and the Pesky Learning Center to provide this research base as the school develops (**See Appendix E**).

Mission: Cultivating the Head, Heart and Hand.

Syringa Mountain School offers Waldorf-inspired, liberal arts and arts-integrated education, incorporating sustainable living practices and experiential learning in a K-8 public school setting. Each child will impart meaning and direction to their lives, through cultivating their intellectual, physical, emotional, social and creative capacities in natural learning environments. Through a supportive community of peers, parents and teachers, each child will become a confident, self-directed and engaged learner, invested in his/her own education.

Vision

Syringa Mountain School will be a highly sought after public school providing a rigorous integrated educational program through a whole-child approach to learning. By integrating traditional Waldorf methods and curriculum with the Idaho Common Core State Standards and Idaho State Standards, children will emerge from Syringa Mountain School with a life-long passion for learning, well prepared for the transition into other academic programs, as creative thinkers, engaged citizens with a strong work ethic, and prepared to become stewards of the earth and its many diverse communities.

Syringa Mountain School will embrace the key aspects of the local sustainability movement, providing students and their families with an increased connection to their local environment. By utilizing the rich community resources of Blaine County and through ongoing cultivation and development of the school's garden and farm, all children will be enabled to deepen their connection with the earth, self and community.

As a result of attending Syringa Mountain School, students will demonstrate

- Reverence and stewardship for self, others and the earth.
- Creative and imaginative thinking.
- Critical thinking and good judgment.
- Literacy.
- Responsibility and self reliance.
- Lifelong learning.

TAB 2 PROPOSED OPERATION AND POTENTIAL EFFECTS OF THE PUBLIC CHARTER

Proposed Operations Organization: Ref. Idaho Code 33-5204(1)

SMS is a non-profit organization organized and managed under the Idaho Nonprofit Corporation Act. The Corporation is organized exclusively for educational purposes within the meaning Section 501(c) (3) of the Internal Revenue Code of 1986, or the corresponding provisions of any future federal income tax code. The Articles of Incorporation for SMS were filed with the Secretary of the State of Idaho July 10, 2013. SMS obtained a Employer Identification Number 35-2450616 on 7/24/2012. The 501(c) (3) application was received by the IRS on September 26, 2012 (See Appendix A), and is anticipated to be approved late July 2013.

A. Founders

Our vision for a charter school using Waldorf-trained teachers and Waldorf methods began three years ago. The Wood River Valley is home to one of only two Waldorf schools in Idaho. For the past 7 years, a non-profit private school located in Bellevue, Idaho, The Mountain School, has educated children of the Wood River Valley. With the downturn in the economy over these past three years, the school is slated to close its doors. A group of interested, passionate and active parents and staff began to investigate founding a public Waldorf school that would bring this methodology into the public arena. Through their research, they uncovered the national burgeoning public Waldorf charter school movement and began communicating with schools in Colorado, California, Washington and Oregon. Recognizing that traditional school settings work well for most children but not all, this group is now presenting this petition to diversify the educational opportunities for students and parents in the Wood River Valley through establishing Syringa Mountain School.

The Founders of Syringa Mountain School represent a larger group of interested and committed parents, educators, and community members.

In the sentence above, I recommend you reference Appendix D. Then you should delete all of the detailed information about your founders (below) since it is duplicative with information provided in the appendix and isn't needed in the petition narrative / this section.

Mary Gervase is the part time Director of The Mountain School and an educational consultant for the Idaho State Department of Education Capacity Building Project. She was the Executive Director and Co-Founder of the Sun Valley Spiritual Film Festival. She has served as the Director of Education for the 2009 Special Olympics World Winter Games, as well as the Assistant Superintendent of the Blaine County School District, in Hailey, Idaho. She has worked as a K-8 elementary teacher, a school guidance counselor, an assistant principal and principal, and as a State Department of Education consultant in locations spanning Utah, Idaho, New Mexico, and with the Department of Defense Dependent Schools System (DODDS) in both Scotland y. Her education includes a Bachelors Degree in Elementary Education, a Masters Degree in Educational Psychology, and a Ph.D. in Educational Administration.

Ben Rogers is employed as a Financial Engineer with the hedge fund manager Sun Valley Gold. In this capacity he is responsible for research, development, and implementation of automated trading strategies. Ben holds a BA in Economics from Cornell University and an MBA (Honors) from the University of Chicago Booth School of Business. He resides in the Sun Valley, Idaho area and is the father of two children that attend The Mountain School, a private Waldorf school. The enthusiasm of his children for this school has motivated him to help make Waldorf education available to all children of Sun Valley.

Travis Scott is a native of western Montana and grew up immersed in wilderness and animal care. Travis lives in Hailey with his wife, Carrie, and daughter, Cora, and is currently enrolled in the Micha-el Institute Waldorf Teacher Certification in Portland, Oregon. He earned a B.A. in English Literature from Centre College in Danville, Kentucky in 1995. Travis has a decade of experience as a wilderness river guide, has taught skiing and swimming, and has a wide range of woodworking skills. Travis has a passion for human growth and helping each person express their deepest potential. In addition to his Waldorf studies and teaching, Travis owns and operates The Well Life Center in Hailey, dedicated to innovative means of enhancing wellness and health.

Don Keller serves as our charter school expert. He brings over 26 years of educational experience to Syringa Mountain School. He has experience working as a school administrator and teacher in the elementary, middle, and high school levels. Don was an original founder of the Sage International School of Boise and currently serves as the schools Executive Director. He is an active member of the Idaho Charter School Network and has provided extensive consulting and mentoring to start up charter school groups. When he is not running schools and doing educational research, Don enjoys the mountains, reading, traveling, and spending time with his family.

Joy Higdon Spencer serves as our liaison with the Blaine County School District. She is currently a first grade teacher in the Blaine County School District. She has worked in a variety of capacities in the education arena, as a teacher, para-professional and as an outdoor educator and naturalist guide. She received her MA in Elementary Education from Western Governors University and her BA in Environmental Studies and Biology from University of Tennessee. Her son has had the great fortune to attend Waldorf schools and camps, of which Joy is a huge advocate. She is an innovative and compassionate educator, who believes children have the right to a holistic education that fosters increased understanding of our natural world coupled with global awareness and 21st century skills.

Greg Bloomfield is a business man with 29 years of experience managing the overall operations of one of the more respected Independent Insurance Agencies in the state of Idaho. From his 1984 start in the industry as a salesperson in a very small organization, Greg has led his company to become one of Hailey's larger employers. He successfully sold the firm in December of 2012, however, he remains its' President and enjoys a less demanding role in the day to day operations of the agency. This move was contemplated for the purpose of having more time to devote to his 2 younger children, 8 and 11, who were each adopted in China as 9 month olds. Greg's business was awarded Business of the Year by the Ketchum-Sun Valley chamber of Commerce in 2004, recognizing the organization's commitment to community support and

volunteer contributions of its staff. Greg served on the board of the Independent Insurance Agents of Idaho for many years and was elected its' President in 2010. He served 5 years on the board of Company of Fools, Hailey's award winning theater company. Additionally Greg served as President of Hailey's Rotary Club in 2004-05 and sat on its' board for many years.

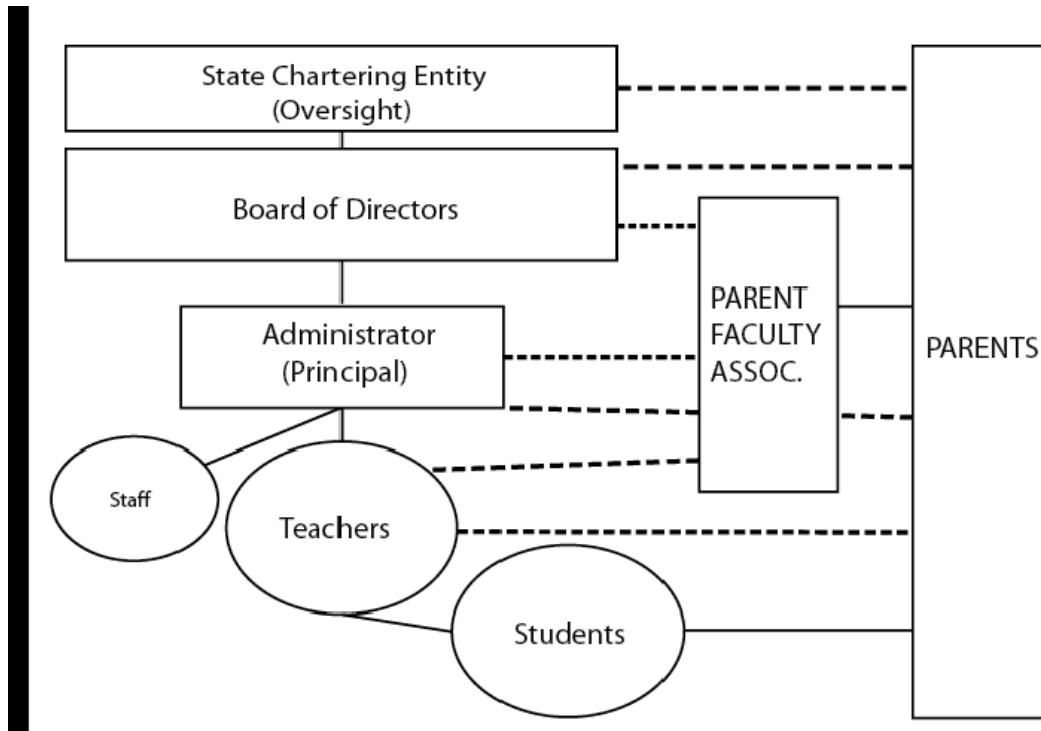
Greg was raised on the east coast, migrating to Idaho in 1976 where he enjoys hunting, golf, and the great outdoors. He and wife Annie, along with daughters Grace and Gaby, live on a small ranch south of Bellevue, replete with 5 horses, 3 dogs, and a trout pond. In the winter of 2013, the family spent the winter in Mexico, where all were involved successfully in the home schooling environment.

B. Board of Directors

The Board, as a Board, will have the full power and duty to manage and oversee the operation of the Corporation's business and to pledge the credit, assets, and property of the Corporation when necessary to facilitate the efficient operation thereof. Authority is given to SMS Board by the State of Idaho as provided in the "Public Charter Schools Act of 1998." (I.C. 33-5204) The Governing Body will adhere to the SMS Corporate Bylaws addressing the Idaho Open Meeting Law. Upon approval, members of the Board are deemed public agents to control SMS. The Board has all the power and duties afforded to a board of directors. SMS will be considered a public school for all purposes and, as such, will be responsible to identify and comply with all statutory requirements affecting the operation of a public school. Therefore, upon approval, the Board will follow the open meeting laws, keep accurate minutes, and make said minutes available to the public.

B. Organizational Flow Chart

SMS will function as a non-profit organization, organized and managed under the "Idaho Nonprofit Corporation Act," as outlined in SMS's Corporate Bylaws and Articles of Incorporation. Accordingly, the organizational flow chart representing the flow of information and the chain of command is as follows:



The organizational chart (from American Heritage Charter School) above includes, but is not limited to, the following details:

1. The Board, as a Board, will have the full power and duty to manage and oversee the operation of the Corporation's business.
2. The Board will have the responsibility to approve the selection of the school Principal, who may not be one of its members. The Board also will be responsible for hearing, and approving or disapproving, the recommendations of the school Principal with respect to changes in staffing, programs, or curriculum.
3. The Board will, when necessary, adjudicates disagreements between parents and the administration.
4. The Principal/Designee represents the Board as the liaison between the Board and SMS community.
5. A committee, not to exceed four (4) members, comprised of the Principal/Designee and representatives of the Board and faculty will be responsible for hiring elementary (grades K-8) teachers.
6. The Principal supervises, directly or indirectly, all employees of SMS. The Principal will make the final recommendation to the Board concerning hiring per IDAPA 33-523.
7. The administrative staff's primary functions will be management of SMS and facilitation of the implementation of a quality educational program. It is the goal of the Board that the administrative organization:
 - a. provide for efficient and responsible supervision, implementation, evaluation, and improvement of the instructional program, consistent with the policies established by the Board;
 - b. provide effective and responsive communication with staff, students, parents, and other citizens; and

c. foster staff initiative and rapport.

8. SMS's administrative organization will be designed so that all divisions and departments are part of a single system guided by Board policies which are implemented through the Principal.

D. Operation and Maintenance of Charter School Facilities

SMS seeks to maintain and operate facilities in a safe and healthful condition. The Board will ensure that all students have access to all facilities regardless of disabilities by utilizing available resources or contracting with appropriate entities to ensure appropriate accommodations. The operation of SMS's facilities will be the responsibility of the Principal/Designee. The Principal/Designee, in cooperation with the fire chief and county sanitarian, will periodically inspect plant and facilities. S/he will provide for a program to maintain SMS's physical plant by way of a continuous program of repair, maintenance, and reconditioning. Budget recommendations will be made each year to meet these needs and any such needs arising from an emergency.

E. Proof of Insurances

Copies of the initial insurance binders from a company authorized to do business in Idaho for a liability policy, a property loss policy, health insurance, worker's compensation insurance, and unemployment insurance will be provided to the Authorized Chartering Entity no later than thirty (30) days prior to the opening of school, and thereafter thirty (30) days before the expiration of the insurance policies.

Potential Effects Idaho Code § 33-5205(4)

Syringa Mountain School will actively recruit students from its primary attendance area, the Blaine County School District. Opening a charter school in Blaine County SMS the Syringa Mountain School will most likely have directly minimal impact the district financially. on the Blaine County School District (BCSD)

This concern was expressed by Superintendent Lonnie Barber during the April 9, 2013 board work session focused on an in-depth examination of the proposed charter school. The May 10, 2013 Mountain Express Newspaper article captured the quote as,

District Superintendent Lonnie Barber also expressed concerns about a funding loss for the district, speculating that the majority of the charter school students would be taken from the district. "That's 120 kids that take \$5,000 each from the School District," Barber said. The Board Chair was also cited in the article as saying, School Board Chairman Steve Guthrie, who visited The Mountain School earlier that day, said: "I saw wonderful things going on. We want you to be successful, but we do have to ask tough questions and sometimes it comes down to money." (Appendix M) (The BCSD Board just passed a \$79 million budget for their 3402 student population as compared to SMS's \$680,437 for 165 students. BCSD spends approximately \$13,009 per student compared to the state allocation of \$4277).

Notwithstanding, general agreement was expressed by the BCSD Board both formally and informally, that the unique Waldorf Methods program will offer a new opportunity for parents specifically seeking a different school choice and innovative curriculum.

In Year 1 of opening, SMS will enroll have a maximum of 165 students which represents 5% of the present 3402 Blaine County School District student population (Taken from BCSD website and dated September 2011. In subsequent years, if interest increases and at the rate envisioned, SMS enrollment could total 440 students, which represents 11 % of the projected 4062 BCSD student population in 2019-20. See **Appendix R** for available BCSD enrollment trends.

Presently the BCSD is a closed district. It is conceivable SMS could enroll students outside of the primary attendance area that are unable to attend the local schools even if their parents are employed in the area. Although this number is impossible to estimate, it is estimated approximately 2540 workers commute daily as referenced in the Blaine County Transportation Plan August 21, 2012.

SMS could provide some relief for present overcrowded BCSD facilities. The BCSD Board did not approve the proposed construction of a new elementary school. See September 12, 2012 article from the Idaho Mountain Express; Enrollment declines at county schools: plans for new elementary on hold (**Appendix R**).

SMS would provide an additional educational option for local private school students and home school students thereby attracting new families into the public school education arena. See **Appendix R** for attendance area map and descriptions.

A May 2012 electronic survey indicated that all but two families currently sending their children to a local private Waldorf school (slated to close prior to the new school opening), would enroll their children in the new charter school. Of the 59 survey responses returned, 57 support the creation of the public charter school and would send their children to the school (**Appendix O**).

~~The impact on the Blaine County School District will likely be lower than the 165 because prospective students will also come from private schools, home schools, and students relocating to the community from other districts/states.~~

There are numerous benefits that could be realized by both education entities. SMS has been in discussion with Superintendent Lonnie Barber about contracting with the district for services such as special education, transportation, child nutrition and testing and assessment. Although the discussions have been amicable, no formal agreements have been pursued at this time. Contracts such as these provide a more seamless service for our families who may move their children between the two school systems.

SMS has also been in discussion with the district on how SMS can benefit BCSD staff and students. **Appendix R** includes a letter of clarification to Dr. Barber and the Chair of the Board Mr. Guthrie outlining some of these benefits that had been discussed at a lunch meeting. Additionally, it has been suggested to the Board and Superintendent that they a district liaison be provided from the district to serve on the SMS Board to facilitate mutually beneficial decisions and transparent communication.

Target Market-Proven Demand

SMS is a school of choice open to all interested Idaho students and their families living within the primary attendance area consisting of Blaine County School District No. 61. There is a proven demand that Blaine County, Idaho needs this type of education to take the form of a public school. An electronic survey has been conducted to determine “intent to enroll” and as of July 15, 2014 the following data has been compiled:

Total 140 responses

17 preschool
22 Kindergarten
22 1st grade
18 2nd grade
25 3rd grade
23 4th grade
13 5th grade

Total K-5=123 prospective students

You do not need to provide this level of detail (above). Rather, you can just state that early outreach has been received well / had a positive response and that you have a list of interested students in Appendix N. That way, as the number changes, you don't have to update your petition.

Specific names can be found in Appendix N.

The Waldorf community in Blaine County began 7 years ago as The Mountain School (TMS), a private PreK-3 school. The ratio of private paying tuition families to scholarship requesting families has reversed over the 7 years forcing the school to close its doors. SMS anticipates attracting the families who attended the private school ~~as well as the families who have never attended the private school but prefer that type of schooling for their children.~~

<u>Year:</u>	<u>Total</u>	<u>Scholarships (represents any amount of scholarship)</u>
<u>2007-8</u>	<u>22</u>	<u>12</u>
<u>2008-9</u>	<u>29</u>	<u>8</u>
<u>2009-10</u>	<u>28</u>	<u>15</u>
<u>2010-11</u>	<u>30</u>	<u>15</u>
<u>2011-12</u>	<u>32</u>	<u>11</u>
<u>2012-13</u>	<u>39</u>	<u>16</u>
<u>2013-14</u>	<u>39</u>	<u>24</u> <u>Final year of operation</u>

Target Population and Primary Attendance Area

The school will open in the fall of 2014 initially serving kindergarten through 5th grades. The school will start with two classrooms of kindergarten (two half day programs) and one classroom each of 1st through 5th grades. Each year thereafter, as enrollment allows, ~~we plan to add an additional class~~ will be added to each grade and an additional grade through 8th grade. All expansion decisions will be at the discretion of the Board of Directors based on enrollment demand and adequate finances and facilities.

~~The anticipated year 1 enrollment at Syringa Mountain School is 165 students which includes two half day kindergarten classes of 20 students each and 1-5 with 25 students each.~~

Should enrollment approach the minimum for financial viability, the Board of Directors shall take action including, but not limited to, the following:

- Increase enrollment demand through a marketing campaign
- Increase fundraising from external sources
- Eliminate or defer expenses

The new school will be located in the city of Hailey. The primary attendance area for Syringa Mountain School will be identical to the attendance boundaries of the present school district, Blaine County School District (BCSD). See **Appendix R** for primary attendance area map. ~~A number of future school location options are being investigated. Building owners for the old Sun Club and the Forest Service Park complex have been consulted regarding lease arrangements. Purchase of the Copper Ranch Health Club is being considered and meetings have been held with the City Administrator, City Planner and realtor. Bare land options are being considered including Democrat Gulch and possible collaboration with the city and the Wood River Land Trust on the 13 acres just north of the city.~~

Facilities *Idaho Code § 33-5205(4)*

The SMS Board recognizes the importance the physical plant plays in enhancing the instructional program. The goal of SMS is to provide a facility in a convenient location that will both ensure the safety and enhance the education of our students. All sites have been considered based on factors such as safety, diversity of the immediate surrounding neighborhoods, access to major utilities, convenience for transportation, and affordability. The Board has determined that the school would be located within or near the city of Hailey, the population center for the Wood River Valley. The Board has determined that Syringa Mountain School will open in the fall of 2014 in either leased facilities, purchased facilities or a combination thereof.

Four options are provided in **Appendix K** that will require purchase and leasing of property and portable buildings. Additionally, Option 5 consists of leasing an existing office space in conjunction with leasing the closed private school facilities are also being considered as less desirable but realistic short term options. These facilities and any future facilities will be in compliance with ADA requirements and health and safety laws.

An anonymous donation of \$500,000 has been received, greatly increasing the ability of SMS to open the school on its preferred and permanent location, even if in temporary facilities. The Board acknowledges a capital campaign will be initiated upon successful school authorization.

Option 1

The most likely option is on Aspen Street and is a 3.04 acre vacant property in the city of Hailey, Zoned General Residential which allows for schools, meaning no other entitlement proceedings would need to occur. At 3.04 Acres this site is fully self contained and would suffice for the future needs of the school. This location fits the ideals of the Waldorf principals. It is near, 100 feet from the entrance to the Draper Preserve, a public nature conservancy owned by the Wood River Land Trust. This location provides immediate access to the riparian corridor adjacent to the Big Wood River. This site is NOT in any subdivision, and thus has no covenants conditions and restrictions. It is partially treed, and is a long rectangular parcel that provides excellent street access on a relatively quiet street.

We have discussed this option with the City Planner (Micah Austin) and he sees no impediments to this proposal and thinks this is a great site location for the school. The site location is optimal as it is only 2 blocks from Hailey main Street, and is located between two residential neighborhoods. There is sufficient onsite and street parking to accommodate the city requirements.

We are in verbal contact with the seller, whose asking price is \$750,000 (Seven Hundred and Fifty Thousand Dollars), which we are proposing to pay as the price and suggesting either a 501(c3) charitable donation for a portion of the \$750,000 and or seller financing for 50% of the price on a three-year note at 5% interest only.

For facility infrastructure we will lease three double wide mobile classrooms with Restrooms for a period of four years. Each pod is 24x60 feet (1,440 square feet) and has two classrooms, and two bathrooms. 3 Pods will provide 6 total classrooms. Each pods monthly rate will be \$2,303.00 a detailed description of the modular pods from Specialty Modular is attached. A small inconsequential amount of the property is in the 100 year flood plain, less than 5 feet wide by 75 feet long along the south east portion of the property.

Option 2

On Woodside Blvd, this 3.44 acre vacant property in the city of Hailey, Zoned Limited Business which allows for schools, meaning no other entitlement proceedings would need to occur. At 3.44 Acres this site is fully self contained and would suffice for the future needs of the school. This location fits the ideals of the Waldorf principals. It is near a canyon that rises to the east of Hailey, and would suffice for nature walks for the students. There are two separate parcels that we would combined and are subject to a development agreement with the City of Hailey calling for .94 acres to be developed as a park. In discussions with the city planner, Micah Austin, the schools farm facilities and gardens would likely suffice this development agreement need so long as they were accessible to the public.

There is sufficient onsite and street parking to accommodate the city requirements. This site is proximate to Woodside Elementary School and presents excellent transportation capabilities.

We are in verbal contact with the seller, whose asking price is \$511,000 (Five Hundred and Eleven Thousand Dollars), which we are proposing to pay as the price and the seller appears to be willing to receive 50% for down payment and carry a three-year note at 5% interest only for \$255,500.00

For facility infrastructure we will lease three double wide mobile classrooms with Restrooms for a period of four years. Each pod is 24x60 feet (1,440 square feet) and has two classrooms, and two bathrooms. 3 Pods will provide 6 total classrooms. Each pods monthly rate will be \$2,303.00 a detailed description of the modular pods from Specialty Modular is attached. A small inconsequential amount of the property is in the 100 year flood plain, less than 5 feet wide by 75 feet long along the south east portion of the property.

Option 3

This is located on 410 West Bullion Street. These property would be great, but we defined the status as possible because there are two different ownership groups. The .98 acre is in the city of Hailey zoned General Residential which allows for a school. The proposed contiguous leased ground (2-3 Acres) is in Blaine County and would be contemplated as our farm a garden area. The county Zoning permits this use.

This site would total 3.98 acres. Currently 410 W Bullion Street has 3 residential dwellings which would likely be leveled. The county property is vacant currently. If the 410 W Bullion Street property is purchased and the grounds contiguous are leased, this should be sufficient for the future needs of the school.

This location fits the ideals of the Waldorf principals. It is nearly river front property, adjacent to walking easements allowing access to the Draper Preserve and Lions Park. This location provides immediate access to the riparian corridor adjacent to the Big Wood River. This site is NOT in any subdivision, and thus has no covenants conditions and restrictions. It is partially treed, and is relatively square parcel and provides excellent street access from West Bullion. There is sufficient space to accommodate the three modular classrooms that are contemplated.

This site addresses the need for parking with the city of Hailey. At Lions Park, over 100 cars can be parked in proximity to the location.

We have discussed this option with the City Planner (Micah Austin) and he sees no impediments to this proposal and thinks this is a great site location for the school.

We are in verbal contact with the seller of 410 W Bullion, whose asking price is \$698,000 (Six Hundred and Ninety Eight Thousand Dollars). On the contiguous county parcel, we are in contact with the owner's agent and the annual rents are anticipated to be minimal less than \$5000 per year. The challenge of this site is that we lack the current capital to purchase 410 W Bullion outright and the seller is not in a position to finance the sale. Furthermore, we have two owners to negotiate with as opposed to just one entity for our other choices.

For facility infrastructure we will lease three double wide mobile classrooms with Restrooms for a period of four years. Each pod is 24x60 feet (1,440 square feet) and has two classrooms, and two bathrooms. 3 Pods will provide 6 total classrooms. Each pods monthly rate will be \$2,303.00 a detailed description of the modular pods from Specialty Modular is attached. A small inconsequential amount of the property is in the 100 year flood plain, less than 5 feet wide by 75 feet long along the south east portion of the property.

Option 4

This is located at 1970 Woodside Blvd. A Total of 2.88 Acres with existing 20,000 square feet (approximate) shell of a building as well as an aged metal building that covers three tennis courts and is approximately the same size. The zoning is Limited Business and allows for a school.

The challenges surrounding this location are the cost to finish the building. We have preliminary budgets of \$1.5 Million to complete the necessary improvements, not including the swimming pool that is part of the building. Furthermore, we would need to scrap some unfinished foundations on the south portion of the property. We would need to have a capital campaign to raises the funds required for this site.

These property would be great, but we defined the status as possible because of the expenses associated with its acquisition.

We have discussed this option with the City Planner (Micah Austin) and he sees no impediments to this proposal and thinks this is a great site location for the school.

We are in verbal contact with the seller of Copper Ranch, whose asking price is \$799,000 (Seven Hundred and Ninety Nine Thousand Dollars). We have the room for temporary structures if the building or capital is not raised in time for our opening in September of 2014.

Option 5

The last option would be to lease an existing office/motel building temporarily while leasing the closed private school facilities for limited class sessions. A large part of SMS's curriculum is delivered through and using a farm, garden and wilderness setting. Office buildings typically have not had any yard or grass areas included. The Mountain School is located on 2 1/2 acres with an existing classroom building that can legally accommodate 40 students. An additional classroom inside the main home was used for a preschool and can accommodate 10 students. The property is located on the north end of Bellevue, but on the southern boundary of the city of Hailey. Due to the occupancy restrictions, the Board has discussed the possibility of leasing the property for two smaller classes with the remainder of the school located in a separate location. They have also discussed using the campus to deliver the farm and garden curriculum having two classes of students spend the day at the site each week. One office and one motel are being considered. Because these are leased, the Commission staff indicated we would not need to complete the facilities template at this time. **Appendix E** includes a letter from the owners of The Mountain School indicating their willingness to lease the facilities. Appendix E also includes two emails discussing possible lease arrangements.

The lease of the school would include as follows:

(1) Facilities, all currently utilized by The Mountain School:

(a) School Building, 2,000 sq. ft.

(b) Office, 400 sq. ft.

(c) Pre School Room, 300 sq. ft.

(d) Farm Yard, Garden, Playground, 1/2 acre

(e) Parking Lot

(2) Term of one year with option to extend for three years,

(3) Monthly rental rate equal to the market rate, currently approximately \$1,000,

(4) SMS will pay all utilities

Most likely it will lease facilities until the population increases, funding is raised and a permanent location is acquired. Once the charter petition is approved, the Syringa Mountain School will begin awareness raising campaigns and fundraising. If a permanent location is not purchased immediately, the school will enter into a lease agreement in spring 2014. A number of future school location options are being investigated. Building owners for the old Sun Club and the Forest Service Park complex have been consulted regarding lease arrangements. Purchase of the Copper Ranch Health Club is being considered and meetings have been held with the City Administrator, City Planner, the architect Dale Bates and the realtor John Sofro. Bare land options are being considered, most recently Democrat Gulch or a possible collaboration with the city and the Wood River Land Trust on the 13 acres just north of the city. Architectural programming is being contracted with Dale Bates and Board, community members, board members, prospective parents and staff were interviewed on projected facility needs of the new school.

Administrative Services Idaho Code § 33-5205(4)

SMS plans to remain viable ~~at renewal~~ based on a solid management structure representing all levels of constituents and strong leadership. In addition, SMS believes that recruitment and retention of highly qualified and committed faculty and staff are absolutely necessary for long-term sustainability.

A. Relationship with the authorizing chartering entity:

SMS will report directly to the authorizing entity, ~~the Blaine County School District Board of Trustees or~~ the Idaho Public Charter School Commission. The Board of Directors will serve as the liaison between SMS and the authorizer Idaho Public Charter School Commission.

B. Staffing plan/number of employees.

In the most likely budget scenario, SMS will be staffed initially with 6.5 teachers, 1 paraprofessional and one full time administrator.

C. Pre-Opening Timeline The pre-opening timeline should be referenced in the Business Plan (Tab 8) rather than here.

SMS's operating plan and schedule for the next year includes 1) charter approval; 2) application for charter grant; 3) advertisement of charter approval and opportunities for parents, students, and staff; 4) identifying lease facilities, 5) obtaining professional development in Waldorf certification for potential employees, 6) obtaining board professional development, 7) write curriculum aligned to the Idaho Common Core State Standards and Idaho State Standards. A more detailed Pre-opening Plan is found in Appendix L.

D. Administrative services

Administrative services for the school will be provided by the school Principal (state certification required), with support from the Board of Directors. The school Principal will be a full time position. An administrative assistant will complete paperwork and required reporting, in addition to other duties. Oversight will be provided by a contracted business manager and accountant to manage the school's fiscal affairs. As the student population grows and financial allocations from the state increase accordingly, a full time business manager will be hired. An independent financial audit will be performed each year by an independent auditor not affiliated with SMS.

E. The principal

The principal shall assume broad responsibilities concerning but not limited to:

1. Curriculum, instruction, and assessment
2. Instructional materials and supplies
3. Resource allocation
4. State charter school requirements
5. School-wide community building
6. Special services
7. Contracted services
8. Disciplinary support
9. Public and media relations
10. Business and community partnerships
11. Professional development
12. Employment and personnel issues
13. Enrollment and attendance
14. Staff evaluations
15. Facility conditions
16. School climate

F. Operational and reports

Please note – per previous feedback, you should remove all references to programmatic audits, as they are no longer required by statute (thus, the PCSC is no longer requesting them). Also, your formatting seems to be off here (the paragraph below is not indented to align to the header).

Annual programmatic operations and financial reports will be presented to the Board of Directors. The Principal will also serve as the liaison between SMS, parents, and SMS's Board of Directors. The Board of Directors will report the results of the audits to the Public Charter School Commission. Financial operations will be provided by the school. Funding sources will include state allocation per pupil, federal grants, private grants, business partnerships, fees (where appropriate), and donations. The SMS Board is ultimately responsible to its authorizer, and at least one members will be present during every meeting of the authorizer for which SMS is on the agenda.

G. Services

Administrative services will be selected and evaluated by SMS's Board. Teachers will be employed by the school principal and through the use of a written Idaho Standard Teachers' Contract in a form approved by the state Superintendent of Public Instruction. School personnel will be required to hold the appropriate Idaho teaching certifications and endorsements. SMS teachers will hold highly qualified status under the No Child Left Behind Act (NCLB) or will work towards this status in a state-approved program of instruction. This may include state-approved alternative routes to certification such as the American Board for Certification of Teacher Excellence (ABCTE) or other state-approved program. Any teachers teaching a class in a specific content area will be highly qualified in that content area. Teachers who are not highly qualified will have waivers from the State Department of Education.

H. ~~A~~ School Fiscal Year

The fiscal year of the school is from July 1 to June 30.

I. ~~B~~ School Calendar

The Board will establish the dates for opening and closing classes, teacher in-services, the length and dates of vacation, and the days designated as legal school holidays. The proposed school year is commencement after Labor Day and dismissal before Memorial Day. This schedule will be reviewed on an annual basis and may be changed, as necessary, by the Principal in consultation with the Board. (Draft calendar **Appendix T**)

J. ~~C~~ Holidays/Commemorative Day

School holidays will include New Year's Day, Thanksgiving Day, and Christmas Day. For those commemorative days that fall on a school day, the teachers and students will devote a portion of the day on each such day designated in Idaho Code § 73-108.

K. ~~D~~ Instructional Hours

The Board will provide the minimum number of instructional hours for students at each grade level.

L. ~~E~~ Records Management

The Secretary and/or Clerk will be the custodian of records under the supervision of the Principal/Designee. Personnel files and student files are confidential and will be disclosed only as provided in policy and/or by law. A record of persons examining/copying personnel files or student files, other than administrative staff, will be kept for each employment file and student file. All public records will be provided to the public in accordance with the Family Educational Rights and Privacy Act (FERPA), laws of the State of Idaho, and SMS policy.

M. ~~G~~ Non-Instructional Operations

Contractor License, Surety Bonds, and Insurance. The school may hire staff or contract with a service provider for services such as transportation, food service, accounting, business management,

or other business or educational services. All contract service providers are required to have adequate limits of liability insurance as determined by the Board or other state requirement and will maintain the same throughout any contract period. A list of all contracts identifying the party with whom SMS has contracted, the length of the contract, and the expenditures required by the contract must be submitted to the Authorized Chartering Entity for its review no later than thirty (30) days prior to the opening of school and thereafter, annually. No contract will be let to any contractor who is not licensed as required by the laws of Idaho. Before any contract is awarded to any person, such person will furnish to SMS performance and payment bonds that will become binding upon award of the contract to a contractor as follows:

1. Performance bonds in an amount not less than eighty five percent (85%) of the contract amount for the sole protection of SMS; and
2. Payment bond in an amount less than eighty five percent (85%) of the contract amount for the protection of persons supplying labor or materials, or renting or otherwise supplying equipment to the contractor and/or his subcontractors in the prosecution of the work performed under the contract.

N. Day-to-Day Operations

The Principal, in coordination with the SMS Board of Directors, will determine the day-to-day operations of SMS. Please refer to the budget figures in Appendix G and H for staffing numbers.

O. Insurance for Liability and Property Loss

Pursuant to Idaho Code § 33-5204(2), the Authorizing Chartering Entity shall have no liability for the acts, omissions, debts, or other obligations of SMS, except as may be provided in the Charter. **The sentence is duplicated below. Also, per previous feedback, this does not clarify liability effects on the local district, school, or other entities.**

Syringa Mountain School will procure and maintain a policy of general liability insurance and errors and omissions insurance. SMS will obtain its own liability insurance and insure its Board, employees, contents, equipment, and fixtures against injury, damage, or loss. Additionally, in the instance of leased facilities, both the facility provider and SMS will insure their respective interests against damage and for liability exposures with minimum limits of liability of not less than \$1,000,000 per person, \$5,000,000 aggregate or such limits as imposed by the State requirement or as otherwise determined by the Board. All such insurance policies will name SMS as an additional insured and provide for at least ten (10) days written notice prior to cancellation. The facility provider and SMS will provide to each other certificates of insurance prior to the commencement date of facility occupancy evidencing such coverage. A copy of the proof of insurance will be given to the authorizer each time it is renewed for continuous coverage.

Pursuant to Idaho Code § 33-5204(2), the Idaho Public Charter School Commission shall have no liability for the acts, omissions, debts, or other obligations of SMS. SMS will have the same role as traditional public schools in matters of civil liability. The appropriate insurance and legal waivers of liability will be obtained from outside groups using SMS facilities.

SMS shall provide to the Idaho Charter School Commission copies of insurance binders issued by companies authorized to conduct business in Idaho. The binders will contain SMS's policies for liability insurance (per occurrence and aggregate coverage), property insurance, worker's compensation insurance, unemployment insurance, and errors and omissions insurance. Additional proof of insurance will be provided as required by the Commission.

P. Policies I do not think this belongs here; it would fit better in the Governance section (Tab 5)

SMS is incorporated as a nonprofit public school under the laws of the State of Idaho. The SMS Board of Directors is responsible for the operation of the school and the development of school policies. SMS will adopt and adapt prototype policies available through the Idaho School Board Association (ISBA) to the extent such policies are available and applicable. Other policies will be developed and adopted by the Board of Directors as necessary or prudent.

TAB 3

DEFINITION OF AN EDUCATED PERSON, EDUCATIONAL PHILOSOPHY, EDUCATIONAL PROGRAM GOALS, EDUCATIONAL THOROUGHNESS STANDARDS, SPECIAL EDUCATION SERVICES, DUAL ENROLLMENT

DEFINITION OF AN EDUCATED PERSON

Definition of an Educated Person

Syringa Mountain School draws upon a time-tested yet innovative educational tradition. Our definition of an educated person in the 21st century is derived from this context. ¹⁹

An educated person must demonstrate:

- REVERENCE AND STEWARDSHIP: A sense of reverence empowers students with the ability to develop an understanding and appreciation for the interdependence of all life. Students with a strong sense of reverence reflect this knowledge through conscientious respectful actions involving themselves, other people, and the world around them. They have appreciation for truth, beauty and the world. They connect with others. They are compassionate, communicative, grateful, and strive to build interdependent relationships, which positively impact the world.
- CREATIVE AND IMAGINATIVE THINKING: Creative and imaginative thinking empowers students with the ability to think unconventionally, to question assumptions, and to imagine new scenarios. Imaginative thinkers craft astonishing work because they recognize their creative capacities and celebrate them through a variety of artistic mediums. They also act on opportunities and show willingness to take reasonable risk.
- CRITICAL THINKING AND GOOD JUDGMENT: Critical thinking and sound decision-making empower students with the ability to assess the credibility, accuracy, and value of the information that barrages them every day. Critical thinkers and wise decision-makers analyze and evaluate information while still honoring their intuitive capacities. They think through solutions and alternatives and explore new options if their approaches don't work. This often entails working well with diverse peoples to make reasoned, ethical decisions and take purposeful action.
- LITERACY: Literacy empowers students with the ability to read, write, listen and articulate in compelling ways. Literacy goes beyond the traditional meaning to also include people who are mathematically competent, scientifically and technologically adept. They develop their creative and physical abilities as well.
- RESPONSIBILITY and SELF-RELIANCE: A strong sense of responsibility empowers students with the ability to be vital, disciplined, and hard-working individuals. Responsible people take initiative, self-regulate, and are fully accountable for their own actions. They honor their capacities and have a *can-do* attitude. They follow-through on commitments and honor their word.

□ LIFE LONG LEARNING: Students in the 21st century must be joyful, confident, self-motivated, aware, inquisitive, resourceful, and persistent people if they are to know how to best learn and therefore thrive in an ever-changing world.

EDUCATIONAL PHILOSOPHY – If you want to reiterate the educational philosophy, I recommend moving this section to the beginning of this Tab (so that Definition of an Educated Person and How Learning Best Occurs are together)

“I believe that Waldorf education possesses unique educational features that have considerable potential for improving public education in America... Waldorf schools provide a program that...not only fosters conventional forms of academic achievement, but also puts a premium on the development of imagination and the refinement of the sensibilities.”—Elliot Eisner, Professor of Education at Stanford University and former President, American Association for Educational Research ²⁰

Waldorf education is built upon enduring human traits and needs, making it just as relevant today as it was in Steiner’s generation. Our global society faces progressively more complicated political, social, economic, scientific, health, and environmental challenges. There is an undeniable urgency to educate our children for the 21st century. A seismic shift is underway as we move from a society built on the logical linear, computer-like capabilities of the Informational Age to the inventive, empathetic, big-picture capabilities of what is taking its place- the Conceptual Age. ²¹ Students must become expert communicators and decision makers. ²² We must prepare our future generations to thrive in careers we can’t even imagine will exist, and Waldorf education is uniquely positioned to meet this need.

How Learning Best Occurs

At the core of SMS’s educational program is the conviction that education is an art as well as a science. Each child is regarded as an integrated being whose physical, emotional, and intellectual capacities will grow and thrive in response to guided cultivation. Academic studies are therefore enlivened and balanced with artistic and social activities. Each lesson engages the student’s needs for doing, feeling, and thinking. In addition to the core academic areas, additional specialty subjects are crucial to the program. For example, music, movement, visual and performing arts, practical and expeditionary activities are all integral to the curriculum.

The sequence, timing, and presentation of the curriculum are designed to be developmentally appropriate as well as therapeutic for students who are facing the challenges of modern childhood. Instruction is organized using a schedule, which includes *Main Lesson, Practice Periods, and Specialty Subjects*. The breadth of Specialty Classes, combined with the depth of Main Lesson, and the reinforcement of Practice Periods creates a curricular offering reminiscent of a *renaissance-based* education.

The two paragraphs above are actually better suited as an introduction to the educational program. I recommend moving them. This section (How Learning Best Occurs) doesn’t need a significant introduction – it would be appropriate for your revise the following sentence to state the founders of SMS believe that a Waldorf-based program has distinctive features that your board believes create an environment where learning best occurs and then jump right in.

The following 14 *distinctive features* create an environment **where learning best** occurs:

Specially Tailored Curriculum:

As a public charter school, SMS blends Waldorf inspired methods and curriculum with the Idaho Common Core State Standards and Idaho State Standards. The result is an integrated, rigorous and relevant curriculum.

Age-Appropriate Schooling:

SMS's developmental guidelines for when content is presented are in alignment with prevailing theories of cognitive development such as those of Erik Erikson, Jean Piaget, Maria Montessori, and John Dewy. ²³ In addition, we now know that the brain grows in spurts, releasing new capacities in the maturing child and adolescent. ²⁴ SMS's methods are, whenever possible, aligned with these developmental windows.

The Teacher:

SMS teachers understand the word *educate* is derived from the Latin word *educare*, meaning “to bring forth” or “draw out.” Teachers create a classroom environment where each student is honored, allowing learning to be free from inhibition or fear. This also enables the class teacher to gain detailed insight into each child, facilitating more in-depth assessment and encouraging resolution of problems, leading to better results.

Teacher Looping:

A core principle of the school's program is that a cohort of students' moves through multiple grades together with the same class teacher in a process called *looping*. The class teacher, while not the only teacher with whom the group has contact, is the adult who acts as class guardian. The class teacher provides leadership for the class and continuity over several years of development. The resulting connection between student and teacher acts as a guarantor for student well-being, while placing an emphasis on relationships as a means for learning. Mutual respect leads to trust and strong relationships. Renowned educational researchers have cited specific advantages to the looping model, including the following:

- ☐ Instructional time is maximized
- ☐ Teachers increase their knowledge about a child's intellectual strengths and weaknesses in a way that is *impossible* to achieve in a single year
- ☐ An emotional and intellectual climate that encourages complex thinking, risk-taking, and involvement
- ☐ Improved standardized test scores ²⁵

Rhythms in Learning:

The Waldorf-inspired approach sees consistency as a vital element of learning. During the school day the rhythm of learning ebbs and flows. There is a balance of experience between concentration and relaxation, mental and practical work, movement and stillness, listening and participation, observing and doing. Such rhythm sparks interest, maintains attention, and supports children physiologically. ²⁶ Rhythms extend beyond the classroom walls on multiple

levels. For instance, the school's master schedule of classes is set so students engage in most of their intellectual work in the early hours of the school day, when their brains are particularly alert. Another example of school wide rhythm is the celebration of the seasonal festivals, which provides a natural sense of continuity and connection. Parent-partners are supported in their efforts to establish clear and predictable patterns on the home front as well (bedtime rituals, sharing family stories, reading, chores, meals, etc.). As a result of these concerted efforts, students are provided with a strong and secure foundation that fosters healthy development and resiliency.²⁷

The Role of the Arts:

The arts are integrated throughout the school curriculum for several reasons. The visual and performing arts develop the aesthetic sense and support the students' emotional life. For this reason, study of the arts is central to the program. Secondly, artistic activities such as painting, drawing, drama, singing, and instrumental music are combined with core academics to enrich and enliven learning. The arts stimulate the various intelligences in each student.²⁸ Art projects are thematically linked to academic work. For example, fractions may be demonstrated through experiencing musical whole, half and quarter notes.

Research has proven that students who study the arts consistently perform better in academic pursuits.²⁹ Recent scientific studies show that music enriches a person's thinking capacities and overall well-being. In one study, researchers increased students' music lessons from one to five a week while cutting back on math and language studies. After three years these students were as good at math as those who had stayed in the standard curriculum, and even better at languages. Researchers also found the music students to be more cooperative with one another.³⁰ ~~Note we are not proposing to do away with math curriculum!~~

A study conducted by Dr. Carrie Norlund found students who were educated with Waldorf-based arts integration reported numerous benefits, including divergent thinking, internalized knowledge through on-going visual stimuli, emotional intelligence, balance, self-perception, creativity and strength of will. ³¹

A recently published report on Neuroeducation calls for the use of music and the arts, not as a means of enrichment, but as a means of building cortical circuits critical for success in writing, reading and mathematics (Hardiman, Magsamen, McKhann, & Eilber, 2009). ³²

Learning from Whole-to-Parts:

The learning process is integrated and holistic so material is comprehensible and connected across disciplines. Learning typically starts with concrete and familiar examples and moves from there into more abstract concepts. Ideas are presented within the broader context first and then broken down into smaller pieces. This practice is particularly evident in the presentation of *Main Lesson*.

Story and Ethics:

Another key feature of the SMS learning program is *storytelling*. Stories direct attention to personal experience, thereby increasing students "intrinsic" motivation to learn, as well as their

sense of ethics. SMS teachers tell stories *from the heart* and in *their own words*. During Main Lesson teachers recite compelling stories to students of all ages. Classic literature and expository texts are also read at appropriate times after Main Lesson. Teachers make special efforts to use vivid language and imagery to spark the students' curiosity, hold their attention, and model high standards for speech. Through storytelling and the accompanying chalkboard drawings, students become enthusiastic participants in the learning process.

In his book, *The Literary Mind*, cognitive scientist Mark Turner writes that stories are fundamental instruments of thought.³³ Stories are important cognitive events because they encapsulate information, knowledge, context and emotions into one compact package. ³⁴ The story is one of the basic tools invented by the human mind for the purpose of understanding because stories convey complex ideas in a memorable and meaningful way. The integration of art and writing with learning stories enable children to face and accept their own circumstances. Difficult emotions such as isolation, anger or fear can be implicitly addressed by the teacher in story form, thus allowing students to come to terms with their own needs. Conflicts in the classroom can also be worked out through the use of tailored stories.

Teaching through stories has been proven to equip students with deep empathy and strong ethics.³⁵ The pedagogical story is used in Waldorf education to give children strong moral pictures. This has proven far more effective than moralizing, confronting or criticism. Subsequently, a sense of right and wrong is developed in the individual as well as the community of the class. An American study found that Waldorf-educated students scored significantly higher on a test of moral reasoning than students in traditional high school *and* students in a religiously affiliated high school. Waldorf students are also far more likely to voice opinions based on sound principles.³⁶ In his well-known books on the development of a moral and spiritual intelligence in children, child psychologist Robert Coles stresses an immersion in moral stories. ³⁷

Preservation of Childhood:

To ensure optimal learning, the school prioritizes the preservation of childhood. Premature intellectual demands are avoided and skills are introduced at appropriate ages; fostering a cooperative non-competitive environment. Preservation of childhood also calls for the healthy development of the imagination through creative play, nature-based activities, appropriate autonomy and a wholesome environment. ³⁸

Imagination at Work:

As advocates for childhood, SMS works to establish a culture free from consumer-oriented messages and commercial images. Today's children are immersed in an electronic environment. According to a recent study by the Kaiser Family Foundation, by the time the average child reaches 7th grade he spends more time with media than with parents, physical activity, homework, and chores combined. Over-exposure to electronic media hampers the development of the child's imagination, memory, and overall well-being.³⁹ Research indicates children use less mental effort when processing information from electronic media than they do from print. The concern is that children who are exposed to heavy doses of electronic media may never learn to process information in the complex way that facilitates creative achievement.

Healthy Nutrition:

Nutrition and schooling performance go hand in hand. Simply put, bad eating habits negatively affect student attendance, achievement, and behavior. As a result, we have strongly established school-wide nutritional guidelines to improve learning and to embed positive lifelong habits into the educational environment.

Physical Activity:

The qualities of physical fitness and health enhance the students' welfare and academic achievement. Each child is encouraged to rise to his/her individual physical potential. Movement activities, dance and other forms of creative physical expression are infused into the everyday curriculum as well as meaningful work through the garden and farm lessons. To the greatest extent possible, classrooms and play yard space are organized to maximize the children's opportunities for movement.

Parental Involvement:

Parent participation is a keystone of our program. A significant body of research indicates that when parents participate in their children's education, the result is an increase in student achievement and satisfaction. Increased attendance, fewer discipline problems and higher aspirations have all been correlated with successful parent involvement.

Active parents strengthen the school on many levels. As a charter school the individual skills, talents and interests of the parent body are resources which the school depends on. Additionally, strong partnerships with parents bring greater meaning and purpose to education by integrating the children's school life into their family life and into their community.

Successful parent involvement requires ongoing parent education. Parents organize and attend lectures, book talks, support groups, school festivals and class meetings-all of which focus on child development as well as specific aspects of the educational program. The school community is further connected through optional seasonal programs and festivals.

Safe Environment:

Effective discipline is essential to the learning environment. Students need to feel safe and protected in order to be free to learn. To ensure this, age-appropriate behavior expectations are insisted upon. A positive but firm approach to discipline allows students to be gradually led towards self-discipline. SMS teachers are confident authorities who exercise strong leadership creating a healthy environment worthy of imitation. SMS understands that discipline is about teaching versus punishing. Compassionate Communication (**Appendix U**) and Teaching With Love and Logic are the researched based discipline models used (**Appendix U**).

EDUCATIONAL PROGRAM

Syringa Mountain School's curriculum places equal emphasis on a strong academic foundation, artistic expression, social development, and attention to the needs of each child. According to William Butler Yeats, "Education is not the filling of a pail, but the lighting of a fire." Waldorf education engages a child's intellect, imagination, will and sense of aesthetics. How a subject is

taught is equally important as what is taught, hence the use of movement and arts in the curriculum. The research-based, time-tested pedagogical methods designed by Dr. Rudolf Steiner are at the heart of this mode of education. Waldorf methods inspire student volition, inquisition and creativity because classroom activities involve three key areas—the head (thinking), the heart (feeling) and the hands (willing). 40

Research Based Education:

In his landmark book, *What Works in Schools: Translating Research into Action*, Dr. Robert Marzano asserts that we could be on the brink of unprecedented effectiveness for the public practice of education if we are willing to implement what is known about effective schooling. His basic position is simple: Schools can have a tremendous impact on student achievement if they follow the direction provided by research.

Marzano's research has important implications for SMS and the broader Waldorf public charter school movement. The latest research in educational neuroscience establishes strong linkages between high student achievement and Waldorf-inspired methods. In fact, Marzano's own research confirms that the use of certain practices used in Waldorf schools, like teacher looping, summarization, and interdisciplinary teaching allow children to excel on a variety of assessments, including standardized tests. 41 As educators and their allies implement what they are learning from brain research, Waldorf charter schools will both benefit from and contribute to educational reform.

Specifically, we anticipate a steady stream of interest in our unique program, and we will embrace opportunities to disseminate best practices.

Overview of the Curriculum Content

Reading research

Waldorf education approaches reading instruction from a different perspective so that instruction is synchronous with the development of the child. Reading is much more than recognizing sound/symbol relationships. For true reading to occur, there must be a corresponding inner activity that takes place as the child decodes words; that is, the child must form an inner picture of what he or she is reading so that comprehension and vocabulary develop. The rich life of the imagination is most potent in a child during kindergarten and the early primary years. And this is also the age at which the child's sense for the sound and rhythm of language is at its peak. Additionally, the foundations for reading are built through areas such as writing and drawing, oral storytelling, memorization, and sensor motor skill development. Reading instruction begins in Kindergarten.

From Common Myths about Waldorf Education: Reading

“Is it true that Waldorf students are not taught to read until second grade?”

“No! Learning to read is an entire process with many contributory facets, and Waldorf Education undertakes reading instruction in almost the opposite way that it is introduced in most schools across the nation. Indeed, the foundation for reading instruction is laid already in the kindergarten.

In the United States, the mainstream approach to reading has been to introduce decoding skills as the first step in the reading process. This entails memorizing the alphabet and its corresponding sounds through repetitive drills and then linking these sounds together to read simple words and sentences. This is the approach that is built into early readers. You probably remember: "See Dick run. Run, Dick, run. Run, run, run.", or some similar type of reading material when you were in school. Because the content of these early readers must be very simple to restrict words to those that can be easily sounded out, teachers are forced to wait until the middle and upper elementary years to work on more sophisticated texts. Then teachers must work hard to improve comprehension since the pupils at this age have already moved beyond the phase of where imaginative thinking is at its peak.

There is a second concern about teaching reading skills in this sequence. This approach is difficult for many young children because, in many cases, their eye muscles have not matured to the point where they can track properly on a page. Thus, a number of children will be labeled as slow or remedial readers simply because their eyes may not have matured as early as other children.

Waldorf Education approaches reading instruction from an almost opposite direction specifically so that instruction is synchronous with the development of children. Reading is much more than recognizing sound/symbol relationships. For true reading to occur, there must be a corresponding inner activity that takes place as the child decodes words: that is, the child must form an inner picture of what he or she is reading so that comprehension develops. The rich life of the imagination is most potent in a child during kindergarten and early elementary years and is present at the same time that the child's sense for the sound and rhythm of language is at its peak.

To capture these capacities at the time that they are most present in the child is the rationale for a foundation of reading that begins first with spoken language. The rich language of fairy tales, the pictorial imagery of songs and poems and the desire of the young child to listen to stories and repeat rhymes and sing songs all become the basis for a language arts curriculum through which a child may come to love "the word". Imagine how much more complex and imaginative are the stories to which a child may be introduced if they are orally presented rather than through the simplistic language of a reader. Imagine how much a child's vocabulary can develop from listening to the content that the teacher brings. Imagine also how much more sophisticated a child's understanding (comprehension) of the world can become through hearing the rich and complex language in the teacher's presentations and stories.

For all of these reasons, Waldorf students will be given a strong foundation in comprehension, vocabulary and in the sounds and meanings of their native tongue. Then students will be introduced to writing and spelling the letters and words that are part of their stories. And, as a final step, the students will read from their own texts describing the stories that they have heard. In this way, students have the proper time to develop all of the skills that are part of the complex skill of reading at the time when it is most appropriate for them to do so. When reading is approached in this way, children become voracious readers who love and understand what they choose to read." ⁴² **

Approach to Literacy:

As with all good teaching, we build from the known to the unknown when it comes to literacy. Rather than push a student to decode quickly, we concentrate on building a solid foundation for long-term writing and reading success. This foundation begins with what the child already knows—*oral language*.

The first grade child learns how to write and then read what he has already learned to say. This builds upon his assets versus deficits. Over the course of the year, the teacher introduces the letters and sounds in imaginative ways. Story, art, music, movement, sculpture, vivid language, and other creative learning strategies are used to integrate the senses and inspire students. As a result, the students' motivation and joy in learning are significantly raised.⁴³

Students become increasingly capable of writing and reading sight words as the first grade year progresses. The teacher presents the study of these words in the context of compelling and age-appropriate stories. This work is done during Main Lesson and practice periods. Current educational research ⁴⁴ including several longitudinal studies, demonstrates that such an approach to literacy is highly effective.⁴⁵

Learning to Read:

SMS uses both the whole language approach and phonics instruction to teach students to read. The reading process begins from the teacher's own instruction and writing. Learning is familiar and relevant. By the end of first grade, many students will be reading simple books and will know dozens of sight words. Most will clearly understand that letters represent sounds, which form words, and that these words can be used to say fun, creative, and powerful things on paper. They will be able to listen attentively and concentrate for more than 30 minutes at a time. Such control is a remarkable milestone and translates into proven future academic success.⁴⁶

Students enjoy a variety of stories and become adept at talking about the sequence, characters, settings, and events of a story. Some students may learn to read independently and fluently in the first grade year. The focus of literature is primarily on fairytales because they speak to the developmental needs and interests of this age.

By second grade, students' writing will become increasingly beautiful as the teacher carefully models penmanship and guides them through form-drawing classes (see below), which actually teaches cursive handwriting through brain integration. By the end of the second grade year, more students will have learned to read independently and fluently.

The vast majority of third grade students read independently and fluently. Their cursive handwriting and spelling improves dramatically over the course of the year. While the approach described above is typical, other strategies may be implemented when needed.

Handwriting research:

Additionally, handwriting is key for learning, memory and creatively development. In many schools, handwriting is hardly taught any more. At Waldorf schools it is a mainstay of the curriculum throughout the elementary grades. New research shows that the fading art of handwriting can benefit children's motor skills and their ability to compose ideas and achieve

goals throughout life. An article in the Wall Street Journal describes how, by using advanced tools such as magnetic resonance imaging, researchers are finding that writing by hand helps with learning letters and shapes, can improve idea composition and expression, and may aid fine motor-skill development. Another recent study demonstrated that in grades two, four and six, children wrote more words, faster, and expressed more ideas when writing essays by hand versus with a keyboard. Studies suggest there's real value in learning and maintaining this ancient skill, even as we increasingly communicate electronically via keyboards big and small. Indeed, technology often gets blamed for handwriting's demise. But in an interesting twist, new software for touch-screen devices, such as the iPad, is starting to reinvigorate the practice. ⁴⁷

Reading to Learn:

The literacy level of students begins to soar during third grade as students enter the *reading to learn* stage of their development. Students become increasingly motivated to read independently about their own interests as well as to study for school. They comprehend more fully what they've read and are equipped with an arsenal of effective reading strategies, including clarification, questioning, summarization, and prediction.

Students in the upper grades are often seen reading respected fiction, rigorous nonfiction, as well as articles from magazines and newspapers. According to current student achievement data collected through the ZOOM! project of the California Charter Schools Association, students in Waldorf-inspired schools begin to outperform their counterparts in traditional school settings on standards-based test scores in English-Language Arts at third grade and above (Oberman, 2010).

Parents are informed when the delivery of the SMS curriculum differs in sequence from traditional schools, so that they may make well-informed decisions on the enrollment of their children. Parents learn of the benefits of remaining in the school throughout the grades and long-term commitment to the school is sought. Parents are highly encouraged to support the school's literacy efforts by reading to their children for a minimum of thirty minutes each evening.

Approach to Mathematics

In the early elementary years, math instruction flows from the whole-to-parts and is especially integrated and playful. Stories, art, manipulatives, music, mental games and movement are used to stimulate students' neural resources and to create a learning context. The primary mathematical operations are taught side by side to demonstrate their interdependence and to discourage the "one right answer" mode of thinking. Such an integrated approach to mathematics commands attention, builds-up critical thinking capacities, facilitates memory, and imparts a joyful appreciation for the qualities of numbers.

The mathematics program becomes increasingly practical for the nine to eleven year-old child, when useful skills for daily life are strongly emphasized, including: multiplication, long-division, measurement, decimals, and fractions. Such topics are introduced in the context of thematic instructional blocks related to gardening, cooking, building, zoology, farm, etc. In this way, mathematics is made meaningful and comes *alive*. Additionally, children of this age are challenged to make good use of their expanding capacities for personal discipline and responsibility through increased homework levels.

By the time students reach middle school their confidence as mathematicians is solidified. SMS will be careful to ensure that individual children have positive experiences with mathematics from the outset. Now equipped with a solid foundation and positive attitude, adolescents develop an affinity for the concrete nature of mathematical laws. The *objectivity* of mathematics offers them comfort during potentially turbulent years.

The curriculum meets the expanding developmental capacities of students through in-depth study of business math, algebra, and geometry. Students create order, think rationally, engage in logical exercises, and visualize spatially. By the time the majority of eighth graders exit the mathematics program, they are proficient in foundational mathematical skills, have been introduced to important principals of geometry, and have completed Algebra I.

Science through Observation

Science standards are taught through *observation* and *experience* of our natural environment. Through nature studies, gardening, and environmentally conscious practices, the children develop reverence and a sense of guardianship for the Earth and all of its inhabitants. In the upper grades, the teacher sets up experiments, and call upon the children to observe carefully, ponder, discuss, and write up scientific observations. The students then draw their own conclusions. Through this process, rigorous independent thinking and sound judgment are cultivated. Zoology, botany, chemistry, physics, astronomy, meteorology and physiology are presented in the upper grades.

Role of Technology

At SMS, technological literacy occurs in a specific and gradual timeframe. Technology is used as a learning tool during middle school. Before this time, it is critical for students to interact with one another and with teachers in exploring the world of ideas, participating in the creative process, and developing their social skills and inner qualities. As older students, they become proficient in computer technology and web-based research. Many Waldorf graduates have successful careers in the computer industry (Educational Leadership, 2008).

A recent report from the MacArthur Foundation supports this approach. It asserts that we must first foster in students the social skills and cultural knowledge necessary so they may deploy technological tools properly and gain their full benefit. “Our goal should be to encourage youth to develop the skill, knowledge, ethical framework, and self-confidence needed to be full participants in contemporary culture” (Elkind, 2001).

How will you ensure that students are prepared to meet standards related to technology and/or take standardized tests electronically?

Humanities and Multiculturalism

SMS teaches students to appreciate the diverse cultures that have influenced humanity over the centuries. Children are exposed to world cultures through the presentation of the peoples, legends and literature of the world. The students gain flexibility and an appreciation of the diversity of humankind. The performing arts curriculum is an integral part of these studies, culminating in an annual class play performance in second through eighth grades and musical performances.

Significantly, it is not only through their studies that students learn to be *multicultural* and *tolerant*. The children in any class come from a variety of backgrounds. These groups of mixed religious, cultural, social, economic, and ethnic elements coalesce together into a cohesive community, which stays together for *multiple years*. In this way, SMS classrooms are microcosms of larger society. Social harmony is developed through positive peer interactions that are sustained over time.

The net result of our multicultural curricula and intimate educational environment is an especially inclusive schooling experience. Waldorf education was commended by the *United Nations* for promoting peace and tolerance in impactful ways (Hart, 2001).

Foreign Languages

Foreign Language usually begins in first grade, giving children insight into and familiarity with another language and culture when they are especially primed to absorb this. Through the grades, the foreign language program expands to include reading, writing, grammar and conversation so students become increasingly proficient in at least one foreign language. Spanish will initially be taught to all students across the grades. A second foreign language may be introduced at a future date. Aspects of other languages (e.g., Latin, Greek, Hebrew, and Japanese) are also woven into the curriculum.

Music

Music is a central component of our curriculum and is found in every classroom. Instrumental music practice begins in first grade, with flutes and recorders that are stored in cases the students knit themselves; as early as third grade students learn an orchestral instrument, usually the violin.

Practical Subjects

Practical work such as crafts, woodworking, and handwork (handicrafts) are brought to the students using natural materials. Research confirms that optimal brain development is founded on refined motor development. Learning to knit, crochet, sew, whittle, etc. develops the motor skills that enhance intellectual development, concentration, coordination, perseverance, and imagination (NYTimes, 2009) Students also have hands-on experiences building shelters, gardening, caring for the animals and cooking.

Such practical learning builds on the students' innate sense of *wonder* and *awe* at nature. For instance, in gardening they observe seeds, the young seedlings about to be transplanted, the young plants with leaves reaching for the sun, the developing plant with flowers, and the mature plant with its fruits, vegetables or roots for harvest. Students also observe the circle of life by watching the older, dying plant with its seeds and then its transformation through the composting to rich soil to nourish new seeds.

Interdependence and Stewardship:

Another primary goal of the practical curriculum is to instill in students a deep understanding and respect for the interdependence between humans and the natural world. Students appreciate that every action impacts the environment, and that their choices have significant consequences for the natural world and other human beings. Students engage in learning experiences and

activities that cross curricular boundaries, promoting a strong sense of environmental stewardship, community responsibility and service learning.

Will and Work Ethic:

Practical responsibilities increase as the children become more capable. Over each year, expectations for sustained and focused work become more apparent. The practical offerings instill positive life habits such as responsibility, hard work, and appreciation for others' labor. Developing the will and drive to complete practical hands-on projects in turn fosters a sense of accomplishment and pride.

Physical Education and Games

A wide variety of age-appropriate physical education classes and games will occur. They are an integral component of the educational program and promote spatial awareness, healthy group dynamics, and physical health.

PER RUBRIC RECOMMENDATION, I suggest renaming the "Overview of each class" section (below) to be the "Curriculum Framework" and moving it to the Appendices. This would include the content from here until midway down the page on page 51 (prior to the start of the Instructional Strategies section, which should stay in the Educational Program narrative). Then at the end of the Educational Program section (just before the GOALS section), add a reference that states that the Curriculum Framework that provides details about each grade is included in the Appendices.

Overview of each class:

Kindergarten

Our kindergarten curriculum is developmental; that is, we meet the children "where they are," while simultaneously laying the foundation for academic success in later grades. It is designed to enhance the young child's physical development, which includes fine and gross motor skills, language development and sensory integration. In addition, the activities of the kindergarten are structured to strengthen the child's imagination, creativity, social skills, and sense of self-confidence. Teachers involve the students in maintaining the organization of classroom materials, preparing the foundation for orderly thinking.

Literacy begins in the kindergarten with a rich oral language base. The teachers use multicultural storytelling to develop the students' attention span, concentration, vocabulary, speaking, and listening comprehension skills, and to lay the basis for reading comprehension. Through drama, rhythmic poetry, nursery rhymes, and songs the teachers further immerse the children in vivid and imaginative oral speech and literature. The teachers use puppetry, engage the children in acting out stories rich in vocabulary and imagination, and lead singing games to teach comprehension strategies such as story sequence and character development.

Kindergarten introduces the fundamental concepts of mathematics through creative play and daily practical activities. Mathematics begins in the kindergarten with sorting, one-on-one correspondence, counting from 1 to 30, patterning, and identifying shapes. Through daily practical activities such as setting the table, students learn to pattern, as well as to identify, sort, and classify objects by attribute. The approach, through imitation and creative play, uses raw

materials such as logs, nature blocks and driftwood of different shapes and sizes, seashells, stones, pinecones, etc. By the end of kindergarten students understand small numbers, quantities, and simple shapes in their everyday environment. They count, compare, describe, and sort objects, and develop a sense of properties and patterns. They explore economics through imaginative play that involves sorting and trading objects of different sizes and properties.

The science curriculum in kindergarten gives the children a multiplicity of experiences with the natural world. In the physical sciences, students' creative play involves them deeply in exploring basic physics principles, such as mass, density, gravity, balance, and the creation of pulleys and levers. Students experience the properties of heat and cold, as well as observing seasonal changes. Life science and earth science start with students exploring common objects using their five senses. Students learn to communicate observations orally and through drawings. Nature tables as well as frequent nature walks provide an awareness of the seasons and a connection to the natural environment. The students experience the cycle of growth through gardening, from seed to harvest to transformation through cooking.

Other activities involve students directly in the transformation of colors and natural materials into useful and beautiful creations. These activities include combining colors in watercolor painting, carding and felting raw wool, and making dolls from garden grasses. Finger-knitting develops fine-motor skills and nurtures children's ability to focus and concentrate, while fostering hand-eye coordination. Students' development of fine motor skills and focus is essential for learning to read and write, as well as for doing mathematics and other academic work.

Problem-solving skills have their foundation in creative play that transforms the environment in inventive ways. Creative play provides students with opportunities to imagine, plan, and carry out increasingly complex activities. During creative play, teachers guide students' growing capacities for creative problem solving, social interaction, and self-regulation. Early childhood research shows that free play is serious work for young children, forming the basis for later academic success (NYTimes, 2006)

Curriculum Overview for Grades One – Four from Three Cedars Waldorf

ACADEMICS	1	2	3	4
History & Literature	Fairy Tales Around the World Nature Stories	Fables Around the World Saint Legends Tall Tales Folk Tales	Hebrew Legends & Culture	Native American Tales Norse Mythology Local History Local Natural Resources, Native Peoples, Early Settlers
Language Arts	Letter Forms and Sounds Writing Words and Simple Sentences Beginning Reading with Own Writing as Text Word Families Oral Poetry Oral Recitation	Reading Word Families Punctuation Writing Intro to Cursive Writing Poetry	Reading Spelling Grammar Composition Student Composition Poetry Drama and Speech Handwriting as an Art	Reading Spelling Grammar Composition Student Composition Poetry Drama and Speech Handwriting as an Art
Math	Geometric Form Drawing (freehand) Multiplication Tables through Movement and Recitation Intro to the Four Operations:	Geometric Form Drawing (freehand) Multiplication Tables through Movement and Recitation Four Operations (continued)	Geometric Form Drawing (freehand) Multiplication Tables Larger Numbers with the Four Operations	Geometric Form Drawing (freehand) Multiplication Tables Fractions Long Division (continued)

	Addition, Subtraction, Multiplication, Division Qualities of Numbers Count to 100 Roman Numerals Rhythmic Patterns Number Sequences and Relationships Odds and Evens Word Problems Mental Arithmetic	System of Place Value Number Sequences and Relationships Daily Oral & Written Practice Mental Arithmetic	Beginning Long Division Borrowing and Carrying Time Money Number Sequences and Relationships Weights and Measures Use of the Ruler Daily Oral & Written Practice Mental Arithmetic	Factoring Number Sequences and Relationships Daily Oral & Written Practice Mental Arithmetic
Science	Kingdoms of Nature through Stories	Kingdoms of Nature through Stories	Human Activity in Nature: Farming, Gardening, House Building, Food Production, Clothing Around the World Cooking and Baking	Human Beings and Animal Studies
Geography	Exploration of Immediate Surroundings	World Cultural Geography through Stories	Practical Studies of World Housing and Clothing	Local Geography and Washington State
The Arts	Drama, speech, singing, recorder, drawing, painting, handwriting and sculpting: woven throughout the core curriculum weekly			

SPECIAL SUBJECTS	1	2	3	4
World Languages	Spanish Japanese	Spanish Japanese	Spanish Japanese	Spanish Japanese
Music	Pentatonic Flute and Singing are Integrated into Academics	Pentatonic Flute and Singing are Integrated into Academics	Recorder and Singing are Integrated into Academics	Recorder and Singing are Integrated into Academics Strings
Practical Arts	Handwork	Handwork	Handwork Gardening	Handwork
Movement	Physical Education Eurythmy Folk Dance	Physical Education Eurythmy Folk Dance	Physical Education Eurythmy Folk Dance	Physical Education Eurythmy Folk Dance

Curriculum Grades Five – Eight Three Cedars Waldorf School

ACADEMICS	5	6	7	8
History & Literature	Ancient Mythologies and Histories: India, Persia, Mesopotamia, Egypt, Greece, North American Culture Biographies	Roman History Medieval History Biographies	Renaissance Age of Exploration: Tales of Discovery Biographies	Modern History 18th – 20th Centuries: Revolutions in Politics and Industry Biographies
Language Arts	Reading Spelling Grammar	Reading Spelling Grammar	Reading Spelling Grammar	Reading Spelling Grammar

	Composition Creative Writing Poetry Drama and Speech Handwriting as an Art	Composition Creative Writing Poetry Drama and Speech Research Skills Calligraphy	Composition Poetry Drama and Speech Research Skills	Composition Short Stories Poetry Drama and Speech Research Skills
Math	Geometric Form Drawing (freehand) Fractions Decimals Averages Metric System Daily Oral & Written Practice	Geometric Form Drawing (with instruments) Ratios Proportion Percentages Graphs Estimating Business Math: Profit & Loss, Discounting, Interest Daily Oral & Written Practice	Algebra Geometry Graphs (continued) Daily Oral & Written Practice	Algebra Geometry Practical Applications Daily Oral & Written Practice
Science	Botany	Geology/Mineralogy Physics: Heat, Light, Acoustics, Magnetism, Electricity, Mechanics, Hydraulics, Aerodynamics	Human Physiology & Nutrition Astronomy Chemistry: Inorganic Physics: Continued	Meteorology Human Anatomy Chemistry: Organic Physics: Continued
Geography	Historical Maps of Mediterranean Area North America Mapmaking & North American Geography	Physical Geography of the World Economic Interdependence Cultural Geography: Religions, Traditions, Lifestyles Mapmaking	Physical Geography of the World Economic Interdependence Cultural Geography: Religions, Traditions, Lifestyles Mapmaking	Physical Geography of the World Economic Interdependence Cultural Geography: Religions, Traditions, Lifestyles Mapmaking
The Arts	Drama, speech, singing, recorder, drawing, painting, handwriting and sculpting: woven throughout the core curriculum weekly			

SPECIAL SUBJECTS	5	6	7	8
World Languages	Spanish Japanese	Spanish Japanese	Spanish Japanese	Spanish Japanese
Music	Recorder and Singing are Integrated into Academics Orchestra	Recorder and Singing are Integrated into Academics Strings Ensemble Choir	Recorder and Singing are Integrated into Academics Strings Ensemble Choir	Recorder and Singing are Integrated into Academics Strings Ensemble Choir
Practical Arts	Handwork	Handwork Woodworking	Handwork Woodworking	Handwork Woodworking
Movement	Physical Education Eurythmy Folk Dance	Physical Education Eurythmy Medieval Dance	Physical Education Eurythmy Renaissance Dance	Physical Education Eurythmy Ballroom Dance

Curriculum Overview Grades 1-8 (Mountain Sage Community Charter School)

The following represents our Waldorf-inspired curriculum sequencing and content by grade level.

First Grade

Math: Qualities of numbers; introduction to the four operations of arithmetic; geometric forms; whole number processes; counting rhythms; times tables 2 through 6; number bonds

Literature & Grammar: Pictorial and phonetic introduction to the alphabet; word recognition; writing; poetry recitation; Fairy and folk tales from around the world: selected Grimm's fairy tales, some Hans Christian Anderson and Russian fairy tales late in the year

Science: Nature stories; nature walks; observations; gardening; local environment; seasons; animals

Music and Performing Arts: Singing games; interval and/or pentatonic flutes/recorders (developing finger coordination, concentration, breath control); songs based on seasonal themes; in-class drama based on curriculum

Art: Form drawing; wet-on-wet watercolor painting (emphasizing an experience of working with color rather than creating formed pictures); beeswax modeling; crayon illustrations

World Language: Spanish are through plays, songs, rhythms, poems and games

Handwork: Knitting with two needles (promotes eye-hand coordination, fine motor skills, and arithmetic skills, sequencing, patience, perseverance and self-esteem); seasonal crafts

History & Social Studies: Fairy & folk tales, rhymes; poems; songs

Geography: Spatial orientation; body geography

Physical Education: Circle games

Second Grade

Math: Continue with four operations of arithmetic; story problems; number patterns; times tables 7 through 12, long division, written calculations

Literature & Grammar: Reading and writing; phonetics; elements of grammar (naming, describing words); beginning cursive writing; Animal fables, American Indian myths and legends of heroic people from around the world

Science: Garden and nature studies; school and local environment, seasons; animals

Music and Performing Arts: Singing; pentatonic flute/recorder; in-class drama and performance

Art: Continue form drawing; watercolor painting; beeswax scene modeling, block crayon drawings

World Language: Spanish continued (vocabulary, counting, animals, colors)

Handwork: Knitting patterns of knit and purl (pattern recognition and perpetuation, concentration, fine motor skill development); crocheting

History & Social Studies: Legends and stories of heroic people and animal fables

Geography: Natural studies

Physical Education: Rhythmic games, line games

Third Grade

Math: Memorization of multiplication tables (2 through 12) continued and strengthened; weight; measure; length; volume; money; time; two to three digit multiplication; long division

Literature & Grammar: Elements of grammar (nouns, verbs, adjectives, adverbs); continuing cursive; punctuation; compositions; Stories from ancient history

Science: Gardening; soil; nature studies; animal husbandry; conservation; cooking; house building; farming

Music and performing arts: Singing in rounds; pentatonic and C flutes/ r; in-class skits; performance of annual class play; recorder music notation

Art: Continue form drawing; human gestures in illustrations; painting; beeswax scenes from history; pencil drawing

World Language: Spanish continued (songs, plays, poetry, conversations, and vocabulary)

Handwork: Crocheting (pattern and placement recognition, finger dexterity); hand sewing

History & Social Studies: Study of practical life (house building, clothing, and cooking) around the world

Geography: History of Farming and House building

Physical Education: Traditional Games

Fourth Grade

Math: Four-digit multiplication; continuation of long division; fractions; averages; factoring

Literature & Grammar: Elements of grammar; continuing cursive; miniscule block print; creative alphabets; punctuation; book reports; creative writing; composition; Norse mythology, Indian Legends and local history

Science: zoology, animals in their environment; continuation of gardening and nature studies

Music and Performing Arts: Singing and flutes/recorder in rounds; possible addition of violin/cello; music theory; choir

Art: Advanced (woven) form drawing; painting; clay modeling of animals

World Language: Spanish continued (songs, plays, poetry, conversations, cultural activities, vocabulary, beginning writing)

Handwork: Cross-stitch; embroidery; knotting; braiding (creating patterns from front to back)

History & Social Studies: Colorado and local history

Geography: Colorado and local geography; map making

Physical Education: Folk dancing; Relay Races

Fifth Grade

Math: Decimals; fractions; metric system; geometry as it developed in ancient cultures

Literature & Grammar: Elements of grammar; sentence structure; descriptive writing; continuing cursive, punctuation and compositions; Greek, Indian, Persian and Egyptian myths

Science: Botany; Inductive Method; continuation of garden and nature studies

Music and Performing Arts: Singing; flute/recorder; possible inclusion of violin/cello; 3-part choir

Art: Freehand geometric drawing; painting; clay modeling of ancient world; varied landscapes, drawing

World Language: Spanish continued (simple conversations, poetry, cultural activities, vocabulary, continued writing)

Handwork: Knitting in rounds; knitting socks, hats, or mittens (develop and follow written instructions)

History & Social Studies: Mythology and life in ancient civilizations from ancient India through ancient Greece. Greek history through Alexander the Great

Geography: North American geography as related to vegetation, agriculture, culture and economics

Physical Education: Greek Olympic Games (the pentathlon)

Sixth Grade

Math: Percent; beginning algebra and negative numbers; ratios; proportions; geometric drawing with instruments and proofs; business math

Literature & Grammar: Advanced grammar; descriptive compositions; spelling; biographies; business letters; The Roman Empire and Medieval Literature

Science: Mineralogy; physics (acoustics, electricity, magnetism, optics and heat); beginning astronomy; reproductive systems; continuation of garden and nature studies

Music and Performing Arts: Singing in parts; flute/recorder; possible inclusion of violin/cello; choir

Art: Geometry with compass/ruler; platonic solids; painting; clay relief modeling; woodcarving

World Language: Spanish continued, reading and translation stories

Handwork: Pattern making; 3-D construction (visualizing from two-dimensional to three dimensional finished product)

History & Social Studies: The Roman Empire and Medieval History through Joan of Arc

Geography: European Geography

Technology: Computers introduced into Main Lesson

Physical Education: Sport skills

Seventh Grade

Math: Algebra; mathematical thinking/theory; geometry; graphing

Literature & Grammar: English Literature; Grammar Review; research methods and projects

Science: Physics (mechanics); physiology; astronomy continued; inorganic chemistry; nutrition; continuation of garden and nature studies

Music and Performing Arts: Singing and flute/recorder in parts; possible inclusion of violin/cello; music theory

Art: clay modeling human hand and foot; woodworking; painting; perspective drawing; recreations of masters

World Language: Spanish continued, reading and conversation

Handwork: Hand-sewn clothing; carving wooden bowls; metalwork

History & Social Studies: Renaissance, Reformation and Age of Exploration

Geography: World geography; Africa, South America and Asia

Technology: Computers used in Main Lesson work

Physical Education: Team sports

Eighth Grade

Math: Practical applications of arithmetic; set concepts; algebra; solid geometry

Literature & Grammar: Journalism; writing short plays; Shakespearean drama

Science: Physics; organic chemistry; physiology; continuation of gardening and nature studies through ecology; astronomy; meteorology

Music and Performing Arts: Singing and flute/recorder in parts; possible inclusion of violin/cello; symphonic form; American Music

Art: Black and white drawing; veils with watercolor; perspective drawing

World Language: Spanish continued, dialogue and original writing

Handwork: Machine sewing of original garments; bookbinding; soapstone carving; clay sculpture; woodcarving; metalwork

History & Social Studies: World trade and economics; American history; Modern History

Geography: World geography; Asia and other culturally diverse regions around the world.

Technology: Computers skills and use are a part of the Main Lesson

Physical Education: Team sports

Throughout All Grades:

Drama: Students present an annual production that reflects the year's themes.

Eurythmy: Students practice gestures and movement with speech and music exercises.

Garden, Farm and Wilderness: Students learn and develop a deep understanding and respect for the interdependence between humans and the natural world.

Instructional Strategies

Main lesson

During *Main Lesson*, there are three distinct stages of learning:

□ *Stage One* generally takes place over one day. The teacher guides students through specific learning activities from *whole-to-part*. The children experience this with minimal abstraction so they can absorb the new information deeply. For example, at the beginning of a sixth grade geometry lesson students might observe and then draw natural phenomena such as flowers. As they discover the innate patterns, geometrical concepts emerge. This method is in contrast to teaching that is too abstract or isolated from context, which can then become discouraging and indigestible.

□ *Stage Two* usually occurs the next day. After literally “sleeping-on” the previous day’s content, the children summarize it in their own words with minimal but conscious input from the teacher. In *Classroom Instruction that Works*, Dr. Robert Marzano established that summarization and effective questioning boost student achievement more than nearly any other known teaching strategies.⁴⁸ Additionally, research in cognitive psychology has

found that long-term memory is greatly improved if students process material in a deep and meaningful way. Self-generated elaboration (as happens when a child retells or summarizes information) leads to better recall than mere study of material, as it establishes a long-term memory trace. In this way, the content becomes “owned” and “reconstructed” in new ways by the students. Retelling during Stage Two is consistently more vivid and integrated. The literal process of sleep is seen as an essential part of learning. Research corroborates that the brain processes sensory information in significant ways during phases of deep sleep.⁴⁹

□ *Stage Three* may take place over ensuing weeks and leads further towards the development of analytical thinking capacities. In this third stage there is emphasis on promoting deep understanding at the conceptual level through the use of critical thinking strategies. In the example above, the sixth grade geometry students have now worked with complex theorems and can solve challenging math problems since their learning has been appropriately scaffolded.

Teachers work hard to present information from whole to parts and in thoughtful, thorough ways. They understand if teaching is too detached, unstructured or chaotic; students will not engage which could lead to boredom, frustration, and underachievement.

Teacher Art:

Teachers use chalkboard drawings to spark student storytelling and are inextricably linked to the learning process. Stories are how people remember. As philosopher Isak Dinesen explains, “*To be a person is to have a story to tell*” (Bitgood, 1993).

Form Drawing:

Form drawing, the freehand drawing of geometric shapes, is a subject taught in Waldorf-inspired schools that is not offered in most other schools. Students practice form drawing starting in first grade and typically continue with it through fifth grade. The forms the children draw each year are chosen to resonate with the developmental challenges they typically experience that year and with the academic subjects they study in each grade. In fourth grade, for instance, the children work with fractions and so draw geometric forms that express fractions in visual shapes. Students also draw forms that relate to the cultures they are studying. In fifth grade, elaborate designs are derived from ancient Greece and Egypt as they study those cultures. Form drawing aims to develop specific qualities in students:

- *Concentration:* The children draw slowly and with care, trying to make each shape as well done as possible. Even “simple” forms require focus.
- *Hand-Eye Coordination:* Drawings are usually modeled from an example the teacher draws on the board, which requires the child to repeatedly look up at the example and back down to his or her own work.
- *Handwriting:* Children draw flowing shapes that are reminiscent of numbers, letters, and beautiful cursive handwriting.
- *Spatial Intelligence:* Form drawing requires students to distinguish between left and right, or top and bottom. This develops spatial intelligence, organization, and an understanding of how individual parts relate to the whole.

Handwork:

Handwork is a key element of the educational program, and is critical to the social-emotional, physical, and intellectual development of children. Handwork typically begins in kindergarten with finger knitting and continues with more complex knitting, crochet, cross-stitch, sewing, spinning, weaving, and wood carving as the student progresses through the grades. Individual project-based activities develop eye-hand coordination, hand strength, dexterity, fine-motor skills, and the ability to purposefully track with the eyes (which helps eliminate some reading difficulties). Recent brain research has found that using the hands in such ways opens up neurological pathways that would otherwise atrophy. While relaxing and fun, handwork also involves strong “will-activity” as it demands concentration, perseverance and problem solving.

Eurythmy:

Eurythmy may be the most distinctive course offered in some Waldorf-inspired schools. The word “*eurythmy*” stems from Greek roots meaning *beautiful* or *harmonious rhythm*. Eurythmy is a dance-like art form in which music and speech are expressed through bodily movement. Specific gestures represent spoken sounds, both vowels and consonants. Eurythmy can be thought of as “visible speech or song” Eurythmy enhances coordination, strengthens the ability to listen, and promotes harmony in groups.

Homework:

Because we employ a developmentally appropriate approach to education we understand the need for young children to have the right amounts of time for structured and unstructured learning experiences. We also recognize that homework can be a valuable way to extend and reinforce classroom lessons, giving older students more practice and review time to assimilate new learning. Homework can also help students develop good study skills, discipline, and responsibility, while providing parents the opportunity to be involved and stay current with their children’s.

The Place of Textbooks:

Appropriate and carefully selected textbooks are seen as valuable resources for teachers and students. Depending on the grade and subject matter, SMS uses state-adopted textbooks as teacher resources for lesson preparation, and as important research tools for students to augment their lessons. In particular, state-adopted math textbooks are used for our standards-based practice periods. It is important to note, however, that textbooks do not *drive* decisions about what is essential for students to learn. Rather, teachers select an array of resources, including textbooks, to deliver standards-based lessons.

High-Quality Materials & Aesthetics:

High quality materials, many of which are specially designed for the curriculum, further allow students the experience of success in their school activities, promoting self-esteem, a sense of value for quality work, and increased motivation for completing schoolwork in the classroom as well at home. In first through eighth grades specially designed main lesson books are used to allow students to create their own thematic subject books for each unit block. In the

kindergartens and lower grades, age-appropriate play materials are selected or hand-made, and include wood, silk, wool, and other natural materials. Students feel more connected to the environment using materials made from the natural world. Students also tend to focus better and feel more relaxed and nurtured when warmly surrounded by an environment of beauty and simplicity, avoiding classroom décor that is too busy.

School Day, School Calendar and Instructional Minutes:

SMS follows a traditional school year calendar that includes a minimum of 175 days during which instruction is provided by school staff.

GOALS Your goals still need improvement, and you need to add a sub-section regarding the strategies you will use to meet your goals. Please see notes on the PER for details and examples.

As a result of attending Syringa Mountain School, students will demonstrate

- Mastery of the traditional Waldorf curriculum adapted for public schools and aligned to the Common Core Standards and Idaho State Standards.
- By the end of 8th grade, equal or higher performance as measured by State assessments.
- *Beginning in 2015-16, and after being continuously enrolled at SMS for 2 years or more, proficient or advanced scores in reading on the State Assessments for third grade through 8th grade students.**
- *Beginning in 2015-16, and after being continuously enrolled at SMS for 2 years or more, proficient or advanced scores in mathematics on the State Assessments for third grade through 8th grade students.**
- *By the end of third grade, Adequate Growth in reading.***
- *By the end of each year, and utilizing the **Whole Child Rubrics for Reading, Writing, Speaking and Listening**, scores in the Often or Always range of proficiency. (See **Appendix V** and Adapted from the Journey Charter School).*
- *Reverence and stewardship for self, others and the earth.*
- *Creative and imaginative thinking.*
- *Critical thinking and good judgment.*
- *Literacy.*
- *Responsibility and self reliance.*
- *Lifelong learning.*

EDUCATIONAL THOROUGHNESS STANDARDS (IdahoCode33-1612)

Syringa Mountain School will fulfill the thoroughness standards identified in Idaho Code. It has been established that a thorough system of public schools in Idaho is one in which the following standards are met:

Standard A: A safe environment conducive to learning is provided.

Goal: Maintain a positive and safe teaching and learning climate. Every student has the right to attend a school that encourages positive and productive learning, provides a safe and orderly environment, and promotes student respect for themselves and others.

Objectives: The Syringa Mountain School will:

- Develop guidelines for physical safety. These guidelines will include, but not be limited to, the procedures for fire drills, reporting unsafe equipment, methods for checking students in and out of school, notification of parents' rights, and staff monitoring responsibilities;
- Provide a facility and adopt policies that meet all required city, state, and federal health, accessibility, safety, fire, and building codes for public schools;
- Establish, publish, and enforce policies that define acceptable and unacceptable behavior, including zero tolerance for weapons, violence, gangs, and use or sale of alcohol and drugs; and,
- Create an environment that encourages parents and other adults to visit the school and participate in the school's activities.

Standard B: Educators are empowered to maintain classroom discipline.

Goal: Create a positive teaching and learning environment with an emphasis on high expectations of behavior and performance.

Objectives: The Syringa Mountain School will:

- Adapt the policies into a student handbook providing a code of conduct including clear expectations and consequences for unacceptable behavior;
- Set a school-wide philosophy (e.g. Love and Logic, Compassionate Communication) for teachers to handle minor and major infractions in the classroom setting;
- Teach appropriate behaviors and foster responsible decision-making skills; and,
- Establish and maintain consistent rules aligned throughout the school.

Standard C: The basic values of honesty, self-discipline, unselfishness, respect for authority, and the central importance of work are emphasized.

Goal: Offer opportunities for students to develop and express exemplary character traits in concert with the overall educational program.

Objectives: The Syringa Mountain School will:

- Utilize the general philosophy of the Waldorf pedagogy to instill appropriate values;
- Emphasize the importance of adults modeling important values at school;
- Help students build personal bonds and carry out responsibilities to one another and to the faculty and staff; and,
- Develop a sense of community and service within the school, and between the school and the larger community. Community service instills a sense of individual, social, and civic responsibility and enables the student to use newly found knowledge to solve community problems.

Standard D: The skills necessary to communicate effectively are taught.

Goal: Teach students a range of effective communication skills appropriate for the 21st century using the Waldorf pedagogy.

Objectives: The Syringa Mountain School will:

- Emphasize meaningful language experience in the language arts, enhanced by dramatization, memorization and a foreign language;
- Provide access to computers to teach students basic computer skills and, in the older grades, appropriate communication through technology (e.g., e-mail, Internet, on-line learning); and,
- Provide instruction in a foreign language. Knowledge of a second language is essential in many occupations. In addition, knowledge of a second language will boost English proficiency, improve memory and self-discipline, and enhance verbal and problem-solving skills (Gardiner, 2006).

Standard E: A basic curriculum necessary to enable students to enter academic or professional-technical post-secondary educational programs is provided.

Goal: Develop an international citizen for the 21st century through the Waldorf pedagogy and sustainability practices where student capabilities rather than textbooks drive pacing. Students must be well grounded in the basics such as reading, writing, mathematics, science and technology, language and social studies.

Objectives: The Syringa Mountain School will:

- Use the Idaho Common Core State Standards and Idaho State Standards as a starting point to be enhanced by unifying themes and other creative methods using the Waldorf pedagogy;
- Emphasize foreign language; and,
- Teach a comprehensive health curriculum, as required by the state. Physical activity during the school day will be incorporated into the curriculum.

Standard F: The skills necessary for the students to enter the workforce are taught.

Goal: Provide students with basic skills that prepare them for future employment using learning tools such as computers, scientific equipment, and local and national resources. These tools assist students in learning how to learn so that they become lifelong learners and are prepared to enter the workforce with a solid foundation of knowledge and skills.

Objectives: The Syringa Mountain School will:

- Provide a strong foundation in reading, writing, problem solving, math concepts, science, social studies, and computational skills;
- Enable students to develop the following intellectual habits important in the work place: adapting to new situations and responding effectively to new information; solving problems; locating and evaluating information from a variety of sources; making flexible connections among various disciplines of thought; thinking logically and making informed judgments; and,
- Enable students to develop the following personal habits important in the work place: accepting responsibility for personal decisions and actions; honesty, courage, and integrity; a healthy lifestyle; empathy, courtesy, and respect for differences among people; self-confidence; concentration and perseverance; responsible time

management; assuming a fair share of the workload; and working cooperatively with others to reach group consensus.

- Encourage sustainable living practices.
- Encourage the effective use of technology as a tool in the workplace of the 21st century.

Standard G: The students are introduced to current technology.

Goal: Provide to students a technology environment using tools such as computers, scientific equipment, and networks linked to local and nationwide resources.

Objectives: The Syringa Mountain School will:

- Use interactive technology as tools in an integrated educational program rather than as primary instructional delivery systems;
- Use computers as tools for such activities as accessing research information, authoring, computation, record keeping and data storage, and communication.

Standard H: The importance of students acquiring the skills to enable them to be responsible citizens of their homes, schools, and communities is emphasized.

Goal: Provide to students the skills and understanding necessary to become international citizens in their respective jobs and communities of the 21st century.

Objectives: The Syringa Mountain School will:

- Provide a service learning experience that reflects responsible citizenship in a democratic society and an interdependent world;
- Enable students to develop the following habits of responsible international citizens: accepting responsibility for personal decisions and actions; honesty, courage and integrity; empathy, courtesy and respect for differences among people; assuming a fair share of the workload; and working cooperatively with others to reach group consensus;
- Encourage sustainable living practices; and,
- Enable students to understand and apply concepts and principles embedded in each of the social studies: history, geography, political science, and economics.

The Syringa Mountain School will achieve the Thoroughness Standards through its Waldorf pedagogy, curriculum and the unique aspects of the school.

SPECIAL EDUCATION SERVICES

Why are the plans for serving Low-Performing, High-Performing students, and LEP (below) under the Special Education Services header? These students may or may not need special education; these sections should be separate from special education. Reminder: the ELL/LEP, GT, and low-achieving sections that you have are not required by rule / statute, so you may choose to remove them or leave them in (I will not review the content for purposes of evaluating your petition). If you leave them in, please separate it from special education.

PLAN FOR STUDENTS WHO ARE ACADEMICALLY LOW-ACHIEVING

SMS will make significant effort to respond to the personal and academic needs of each child, and to identify and serve those who are academically low achieving or not meeting with success

in any dimension. The school's small size, student-staff ratios, and looping model allow educators to develop special sensitivity towards individual student needs and backgrounds. This translates into a nurturing learning environment with low-stress levels and maximized success. In combination with child study meetings, students' progress is monitored regularly and by multiple educators. Frequent parent contact, interpretation and translation services are also utilized to identify students before they fail.

However, some students will invariably need additional academic or individual support. SMS has developed a plan for low academic achievers that is modeled after the *Response to Intervention (RTI)* framework. Our goal is to meet the needs of all our students through the use of a three-tiered system of support.

Tier I: Prevention

Tier I includes high quality classroom instruction delivered by qualified teachers and regular assessments of all students to monitor their progress toward reaching grade level benchmarks. Teachers are trained to address different learning styles of their students.

Tier II: Identification and Selected Interventions

Identification: In order to identify students who are not achieving at or above expected grade level, students falling below the class average on varied assessments are evaluated to determine if performance was at or below their potential, taking into account the timing of particular subject matter in the curriculum and the age of the child. Beyond academic performance, teachers look for other signals of need as we recognize that there are many factors that affect a student's performance .

Selected Interventions: Selected interventions are implemented by teachers for students identified as achieving below average grade level expectations. Interventions may include, but are not limited to, any of the following:

- ☐ Utilizing other teachers for collaborative, individual or small group instruction
- ☐ Utilizing parent volunteers for individual or small group instruction
- ☐ Peer support with older students, e.g. "reading buddies"
- ☐ Individualized or differentiated math, writing, reading, and spelling approaches
- ☐ Increased movement/sensory integration activities
- ☐ Modified class work, extra lessons, or extended learning opportunities
- ☐ Additional parent /teacher communication or partnerships

Child Study: If a student does not respond to initial teacher interventions, the student is referred to the *Child Study* process. Child Study occurs during the weekly Faculty Meeting. The class teacher initiates the process by giving colleagues a complete and holistic picture of the child. After the child is described physically, socially, and academically, the teachers have an opportunity to ask additional questions. Discussions of a particular child may take place during several meetings. Next, the teachers are asked to observe the child for one week. Then, the parents of the student are often invited to describe their child and to offer insight or suggestions. Teachers and parents brainstorm together in order to find solutions to help the student become more successful.

Care Team: To ensure that no student “falls through the cracks” a standing committee known as the *Care Team*—comprised of staff members with particular experience and passion for student support—meets regularly to monitor progress and to advocate for students. The Care Team uses a systematic problem-solving approach to assist students with any concerns that are interfering with success. Parent input may be solicited for the Care Team process.

The Care Team clarifies problems and concerns, develops strategies and organizes resources, provides a system for school accountability, and serves to assist and counsel the parent, teacher, and student. *The Care Team is a general education function.* All students can benefit from the Care Team, including but not limited to, those students achieving below grade level, those who are achieving above grade level and require greater challenge, and students who have experienced emotional trauma, behavioral issues, or language issues. Instructional staff that has concerns for a student can refer that student to the Care Team for consideration.

Tier III: SST Intensive Interventions

If there is little or no improvement during the first two tiers, the student will likely be referred to the Student Study Team (SST), for further assessment. The school will follow the ISDE SST processes with appropriate documentation and referral to special education assessment for services when indicated. Assistance will be requested/contracted from the Blaine County School District staff or another school district or contractor when needed.

PLAN FOR STUDENTS WHO ARE ACADEMICALLY HIGH-ACHIEVING Gifted and Talented

The curriculum inspired by Waldorf education is, by nature, multi-disciplinary. It involves academic learning supported by a rich artistic curriculum along with movement instruction and social learning. Ideally, this creates a climate where all children succeed in some areas, while seeing their classmates excel in others. This learning atmosphere builds individual self-esteem, as well as students’ respect for each other as important members of their classroom learning community.

In addition to using an approach to learning that is inspired by Waldorf education, the plan for students who are academically high achieving includes:

A. Differentiated Instruction

“Differentiated instruction” is a method of teaching that involves matching learning styles with abilities. This type of teaching is inclusive of many strategies and techniques that best suit the needs of the students at any one time. Specifically, differentiated instruction is flexible and constantly changing to meet existing needs.” All successful teachers differentiate instruction to meet their student’s needs.

All gifted and talented (G/T) students have special needs; consequently, these students will be provided educational experiences that strive to meet those needs in the regular classroom as well as in special classes, seminars or workshops. The charter school environment allows for areas to be pursued beyond the scope of the regular curriculum, regardless of the student’s areas of special talent. This will be accomplished through, but not limited to clustering, competitions, consultations, curriculum compacting, special topic classes, independent study, and interest-based workshops.

For example, K-3 teachers address the core subjects at the same time of day (especially reading and math) and the students are moved to the “level” needed

B. Policies and Procedures. SMS will implement policies and procedures for the identification and instruction of the gifted and talented according to Idaho Code §33-2003.

C. Definition. Gifted and talented children are defined as those students who are identified as possessing demonstrated or potential abilities that give evidence of high performing capabilities in intellectual, creative, specific academic or leadership areas, or ability in the performing or visual arts and who require services or activities not ordinarily provided by the school in order to fully develop such capabilities.

D. Identification SMS will identify G/T students using a variety of formal assessments (Standardized Intelligence Test or other equivalent assessment), informal assessments (teacher rating/observations; student records, including GPA; projects or work sample; parent questionnaire; student questionnaire, etc), and other information indicative of giftedness and/or talent (subject experts, personal references, etc.) to ensure all opportunities to be considered for the program have been met. The school’s process for identifying G/T students shall include the following steps:

1. The school shall screen all potentially G/T students to ensure they have an opportunity to be considered; and 2. The school shall assess those students meeting the screening criteria and gather additional information concerning their specific aptitudes and educational needs; and 3. The school shall match student needs with appropriate program options.

E. Strategic Plan SMS will develop program options, including, but not limited to: competitions, independent study, curriculum compacting, mentorships, etc. The G/T Program Director or Designee will develop and maintain a written educational strategic plan for the G/T program. After an initial submission to the Board and Authorized Chartering Entity, plans will be reviewed annually and submitted to the Board and Authorized Chartering Entity every three (3) years. The gifted and talent plan will include the following: 1. Philosophy statement 2. Definition of giftedness 3. Program goals 4. Program options 5. Identification procedures 6. Benchmarks and program evaluation 7. Implementation and evaluation timelines

F. Goals

SMS’s goals for the G/T program include, but are not limited to:

1. Providing a learning environment that will encourage the capable student to develop to his/her individual potential while interacting with intellectual peers;
2. Establishing a climate that values intellectual ability, enhances self-concept and encourages self-direction and self-evaluation; and 3. Encouraging the development of, and providing opportunities for using, higher-level thinking skills and acceleration within the regular curriculum.

G. Oversight & Professional Development The G/T Program Director will have the required endorsements and certifications, and will oversee all aspects of the G/T program and develop a comprehensive professional development plan regarding G/T education. The school will work with and possibly contract with the authorizer for additional program oversight and necessary staffing. Gifted and talented, as well as general education, personnel will receive ongoing training in order to meet the needs of G/T students who are enrolled in the school and as part of the annual Waldorf training.

H. Parent Participation The Board understands the importance of parent participation in their child's education. Consequently, SMS will make every effort to facilitate opens lines of communication with all parents/guardians/acting custodians. In accordance with Board policy and state and federal law, parents/guardians/acting custodians will receive written notice regarding identification, evaluation, and/or placement of their child in the G/T program. Parents/guardians will be involved in all placement decisions regarding their child and have the right to request due process hearings at any time.

I. Student Files, Documentation, and Record Keeping: Reference Family Educational Rights and Privacy Act (FERPA) Every student who is identified as G/T will have a confidential file documenting the need for services. The student's file should include the following materials:

1. Referral and consent for testing
2. Summary of test results
3. Assessment documentation, e.g., checklists, nominations, test reports, anecdotal information, portfolio rating scale, etc.
4. Decision of the G/T MDT.

The confidential file will be kept by the SMS G/T Program Director or designee or be placed with the student's cumulative records. In either case, the confidential file must be available to counselors in middle schools, junior high schools, and high schools in order to provide the student with a continuum of services. Other teachers will be granted access to G/T confidential files if they have a legitimate educational interest in the records as determined by the G/T facilitator.

PLAN FOR ENGLISH LEARNERS Limited-English Proficiency (LEP) Program: Ref. Title VI of the Civil Rights Act of 1964, Idaho Code § 33-1617 and 08.02.03.112(5)

SMS is committed to excellence in the area of English Language proficiency. We see a commitment to the arts and a culturally rich educational program as a strong foundation for all language learning. SMS anticipates an enrollment of 33 ESL students. Based on the population demographics of Blaine County, SMS anticipates limited-English proficient (LEP) students to make up 20% of total enrollment. SMS will utilize established criteria and procedures to identify limited English proficient (LEP) students as per Idaho State Department of Education (SDE). The school will work with and possibly contract with the authorizer or another school district for additional program oversight, professional development and necessary staffing.

SMS in accordance with the Board's philosophy to provide a quality educational program to all students, will provide an appropriately planned instructional program for identified students whose dominant language is not English. The purpose of the program is to increase the English proficiency of eligible students, so they can attain academic success. Students that have limited English proficiency (LEP) will be identified, assessed, and provided appropriate services.

SMS will maintain an effective means of outreach to encourage parental involvement in the education of their students. This will be accomplished at the beginning of each school year. SMS will enlist the services of an interpreter to communicate with non-English speaking parents, as required by law. Parents will also regularly be apprised of their student's progress.

A. Progression of Student through LEP Program

The Principal/Designee will implement, supervise and disseminate written procedures regarding an LEP program as required by Title VI of the Civil Rights Act of 1964, Idaho Code § 33-1617, and 08.02.03.112(5), which will:

1. Identify and assist LEP students.
2. Create a plan to quickly emerge student in the English language.
3. Transition LEP students through the program with fluency as quickly as possible.
4. Set attainable goals for students to meet.

B. LEP Program Goals and Procedures

SMS's Principal/Designee will also oversee appropriate LEP instruction and compliance with applicable laws and regulations, by ensuring implementation and adherence to the following programs and procedures:

1. Program goals:

Students whose dominant language is not English should be enrolled in SMS. Students will have access to and be encouraged to participate in all academic and extracurricular activities of SMS. Students will be identified by appropriate testing; teacher referral will be considered, but will not be a determining factor. Identified students will be provided an appropriate, planned instructional program, which may include one-on-one education with a para-professional.

2. Student Enrollment Procedures:

SMS will establish the following procedure for identifying students whose language is not English.

1. SMS will have registration cards for every new student that includes at least the question: What is the primary language spoken in the home?
2. If a response is any language other than English, SMS will send a School/Home Language Survey (HLS) home to the parents.
3. If the survey comes back indicating that a student may be LEP, they will be tested with the English language learners (ELL) Placement test within 30 days of registration or within 2 weeks (15 days) of entry into the school (if during the year).
 - a. If the student scores Advanced on the ELL placement test, the student is not eligible for services and will be placed in the regular classroom. Factors other than English language proficiency are more likely the reason for the student's performance; therefore, SMS will examine other appropriate avenues to support the student, such as Title I.
 - b. If the student tests less than proficient on the ELL Placement test, then a letter will be sent home to the parents indicating that their child was identified as needing specific English language services. The parent will then be given the opportunity to waive services to improve English skills.
4. If the parent does not waive the LEP services for his/her child, the student will be placed in a program of "high quality language instruction, based on scientifically-based research."
5. Once a student tests proficient on the ELL test, they will be exited from the LEP program and monitored for two years.

6. Those students whose parents waive the services may not be considered LEP for state and Federal funding purposes and ISAT coding. However, they are still ELL and will still be served according to their needs.

C. Assessment Procedures for Program Entrance and Measurement of Progress:

1. SMS's testing coordinator/designee will oversee compliance with the requirements of "No Child Left Behind (NCLB)" by administering the Idaho English Language Assessment (IELA) to determine a student's proficiency in the English language once they have been placed in the LEP program. This will enable SMS to comprehensively and accurately track LEP student growth.
2. LEP students will take the IELA in addition to the ISAT or other state content assessment tests administered to students statewide.
3. The IELA will be given using pencil and paper.
4. SMS will study the results of IELA and ISAT or other equivalent state assessments to set standards and objectives for raising LEP students' level of English proficiency.
5. SMS's testing coordinator/designee, having been trained in the pre-identification process, will identify all eligible LEP students so labels can be generated and the correct number of tests (by grade span) can be shipped to SMS.
6. The pre-identification will take place through the same secure website of the ELL Placement test.
7. SMS's testing coordinator/designee will administer the IELA each spring (approximately February through April).
8. SMS plans to use the following state adopted Idaho English Language Development

Level Descriptors:

- Level 1 – Beginning
- Level 2 - Advanced Beginning
- Level 3 – Intermediate
- Level 4 - Early Fluent
- Level 5 – Fluent

SMS will exit students out of the LEP Program when they:

1. Score at the Fluent level overall (4 or 5) and EF+ on all sub domains tested on the IELA;
- AND one of the following:
2. Receive an Idaho Reading Indicator (IRI) score of at least a 2, or an Idaho Standards Achievement Tests (ISATs) or equivalent state assessment score that meets the "Basic" level; OR
3. Demonstrate access to mainstream content curriculum in one of the following ways:
 - a. Consistent proficient scores on grade level benchmark unit assessments;

- b. Qualified teacher observations that are based on language proficiency benchmarks and criteria, with supporting portfolio of student classroom work. Taking into consideration the State recommended exit criteria, SMS will detail exit criteria on the annual LEP Plans which are approved by the Board and submitted to the LEP Program Manager June 30th of each year.

D. Return to LEP Program

In instances when students who have been exited out of the LEP program still need more assistance, the following procedure for reclassification back into the LEP program will be followed: 1. SMS will determine whether the student in fact needs to be placed back into the LEP program. In most cases, these students will still be on two-year monitoring status and coded as LEPX. LEPX students are eligible to take the IELA each spring that they are on monitoring status, however it is not required. SMS's testing coordinator/designee will recommend that these students be tested, so that further monitoring can take place.

1. Additional forms of monitoring an exited student will be:
 - a. classroom teacher observations
 - b. classroom or unit assessments
 - c. student work
 - d. other statewide assessments
 - e. conversations with the student and parents
2. If sufficient evidence deems that a particular student needs to be placed back into the LEP program, SMS's testing coordinator/designee will make sure all documentation is placed in the student's cumulative file.

E. LEP Educational Program, Instructional Approach, and Classroom Accommodation

At SMS we serve all students with the most current research based curriculum and teaching strategies, including our LEP learners. The Program Model SMS will most likely use is Integrated ESL/Inclusion ESL/Sheltered Instruction. The integrated ESL program provides language-assistant services in the mainstream classroom as much as possible. Specialized staff works closely with classroom teachers to provide services. Classroom teachers modify materials, team-teach, and use peer tutors along with instructional aides to provide services. ESL teachers serve as resources to the classroom teacher. Specialized ESL methodology and materials are incorporated into classroom activities as much as possible.

Research has shown that an inclusionary, least-restricted environment is a sound educational practice for all special learners. ESL learners can learn English from peers and feel more successful if they are part of the whole group. Transitioning from ESL is not a problem when they have been part of the classroom all along. ESL students also move into content area materials more readily when they have been included in these subjects. Drawbacks include the problems of including new English learners in classroom activities and the difficulties for classroom teachers to accommodate the various needs of a variety of students. SMS will utilize all necessary resources, such as trainings, input and feedback from Idaho Department of Education personnel, etc. to minimize these potential difficulties.

F. Instructional Approach

1. Our instructional approach is the SIOP model which encompasses the Language Experience Approach. Teacher preparation focuses on clearly defined objectives. Supplementary materials include charts, graphs, pictures, and illustrations. Our instruction builds on our students' prior knowledge and experiences in order to enhance their language learning. We also integrate content teaching with our English language teaching to gain the highest quality of instruction. Within the general education classroom, teachers and para-professionals provide re-teach as indicated by individual needs. Teachers focus on academic language in their instruction.
2. Our LEP program includes integrated settings with small group interventions. The approach for specific students will vary according to the identified needs of each student. This is consistent with SMS's educational approach with the Special Education, Title 1 and Gifted and Talented programs.
3. The following are examples of some of the methods teachers will employ
 - a. Extra-linguistic cues such as visuals, props, and body language (Parker, 1985).
 - b. Linguistic modifications such as repetition and pauses during speech (Parker, 1985).
 - c. Interactive lectures with frequent comprehension checks.
 - d. Cooperative learning strategies (Kagan, 1985).
 - e. Focus on central concepts rather than on details by using a thematic approach.
 - f. Development of reading strategies such as mapping and writing to develop thinking (Langer & Applebee, 1985).
4. The Principal/Designee will monitor the program through the Sheltered Instruction Observation Protocol (SIOP) model to ensure teacher follow through. Teacher's aides and Principal will constantly evaluate student progress, but test data monitoring progress will be the best and most accurate measure of progress.
5. The specific curriculum has not been identified at this time. SMS will counsel with reputable entities and the authorized chartering entity and utilize recommended resources and products, including those suggested by the Idaho Department of Education's website, to determine the curriculum that will best meet the needs of our students. In addition, we would like the principal, the Board, the staff and possibly the authorizer, to be involved in the decision as to which curricular choices will best serve our specific population.

G. Additional Support

1. Students not achieving at expected levels may receive additional help with the infusion of a pullout program, in which the student is temporarily removed from the classroom for specialized attention. The pullout program will be run by an appropriately qualified aide.
2. The elementary instruction is centered on specially designed academic instruction in English. The educational approaches chosen for implementation will reflect the demands of a high level of diversity in the LEP population and will be based on sound research.

3. An ELP is *required* for any student who has an accommodation on a state-wide or district wide assessment. Any assessment accommodation given must be an accommodation that a student receives during regular classroom instruction. *A student may not receive accommodations on any assessment if that specific accommodation is not documented in the ELP and provided in the classroom.* The intention is that the school evaluates the specific individual needs of each LEP student and is helping the student daily, rather than just on assessments. The ELP also helps to provide every teacher with valuable information regarding how to serve each of their LEP students. It is recommended that every LEP student has an ELP on file, even if that particular student is not given accommodations in the classroom.

H. Staff

Since ESL happens in the classroom, classroom teachers become “ESL teachers.” SMS will hire or contract for adequate staff to meet the needs of our ESL population. The Board recognizes the need for the individual to have strong qualifications and a solid resource base as

1) he/she could serve a number of students, and 2) the role as a trainer/resource and guide to school personnel in the instruction of second language learners. All aides will be para-professionals who work with LEP students, preferably with experience, training, or language study in the language of the majority of the LEP population.

I. Professional Development

Professional development focuses a great deal on the training of mainstream staff. The ESL staff will need more intense training but since much of the ESL instruction happens in the classroom, all teachers need to be knowledgeable on appropriate methods and techniques. When a certain instructional approach is chosen, all staff will be trained in it.

1. SMS will utilize the SDE self-reflection tool to monitor the effectiveness of teachers and will provide ongoing training as needed.
2. An effort will be made to provide in-service every year on achieving successful sheltered instruction.
3. Teachers will be given instruction on use of the SIOP model

J. Entrance/Exit Criteria

Students who are limited in their English proficiency enter the program. Exiting will be in stages and based on the student’s English language proficiency and academic achievement. Classroom teachers may play a key role in assessment and evaluation of student progress. Students who have moved into the mainstream classroom curriculum may still require “monitoring.”

Equal Access to Other School District Programs

A. Statewide Assessments: Idaho Standards Achievement Test (or other equivalent state assessment) and Idaho Reading Indicator (IRI) or other state required tests SBAC and SBAC Alt.

1. LEP students must take the ISAT and IRI tests or required state tests. However, there are some exceptions for LEP students, which are described below. All tests should be given in English; however, the Spanish IRI may be given to determine fluency in the native language and to assist with student educational learning plans. A person who scores a 3-4 on the Spanish Woodcock- Munoz is able to administer the Spanish IRI for a student.
2. ISAT or other state required assessments SBAC, SBAC Alt
 - a. All LEP students must take the ISAT or other state required assessments SBAC, SBAC Alt.
 - b. However, if a student is coded LEP1, which means that they are new to a U.S. school within the past 12 months before testing, they may be exempt from the Reading and Language Usage ISATs or other equivalent state required tests.
 - c. Those LEP1 students still must take the Math or other equivalent state assessments so they are counted for participation purposes, but will not be counted for proficiency (AYP) calculations.
 - d. All other LEP students will be coded as LEP and take all ISAT tests or other equivalent state assessments.
 - e. LEPX, students who are exited from an LEP program and who are in their 2-years of monitoring, will be counted in the LEP subgroup for proficiency calculations, only if they are specifically coded as LEPX.
 - f. It is imperative that all districts code their LEP students correctly on all tests, including the ISAT or other equivalent state assessments.
3. In 2006, a Legislative change in rulemaking was made that affects LEP students on the ISAT or other equivalents state assessments. Rules Governing Thoroughness 08-02-03-0502 111.04.c. Assessment in the Public Schools. This rule change removes the 7 year total that an LEP student may be in an LEP Program. Therefore, there is no longer a limitation on how long a student should be given services, if the services are needed.

B. Parent and Community Involvement

SMS will communicate in writing with all parents.

Notification of Placement and Parental Rights

1. Using the appropriate language, the school will inform the parents that their student(s) has been placed in an instructional program for English language learners, no later than 30 days after the beginning of the school year. Or, if the student is identified after the beginning of the school year, the district/school shall notify parents within the first two weeks of the child being placed in a program for ELL students. The notification must

include the date it is sent and the date of enrollment of the student. Notification will be provided in the appropriate language for the parent.

2. The following information should be included in the Notification of Placement:
 - a. The reasons for the identification, which may include results from a proficiency test, other test data, teacher, parent or self-referral. Multiple criteria for identification are strongly advised.
 - b. The student's level of English proficiency, how such level was assessed, and the status of the student's academic achievement, including the name of the test and the date the test(s) was administered.
 - c. Methods of instruction used in the program in which the LEP student is or will be participating in.
 - d. Methods of instruction used in other available programs, including how such programs differ in content, instructional goals, and the use of English and a native language of instruction.
 - e. How the program in which the student is, or will be participating in, will meet the educational strengths and needs of the student.
 - f. How the program will specifically help their child to learn English and meet age appropriate academic achievement standards for grade promotion and graduation.
 - g. The exit requirements, including the expected rate of transition from such program into English only instruction classrooms.
 - h. How the program meets the objectives of the individualized education program of a child with a disability.
 - i. Information pertaining to parental rights that include written guidance on:
 - i. the right that parents have to have their child immediately removed from the program upon their request;
 - ii. the options that parents have to decline to enroll their child in the program or to choose another program or method of instruction, if available;
 - iii. the assistance available to parents in selecting among various programs and methods of instruction, if more than one program or method is offered by the district or school.
3. Open meetings will be conducted throughout the year with appropriate interpreters present.

C. Program Evaluation, Review, and Improvement

SMS will evaluate the success of the LEP Program to ensure student success using staff and outside expertise, possibly from the authorizer or another school district.

D. Using Data to Drive Decision Making for LEP Programs

Data and test scores for each student should be only one way to evaluate if a program is successful. Professional development, teacher training and solid instruction all help to determine or drive the "data". Therefore, there must be an accountability plan in place for all teachers to begin to implement good teaching strategies aimed at reaching the English language learners in their classroom.

1. Below is some of the information that the school will consider when disaggregating data:

- a. Race/ethnicity
- b. Gender
- c. Migrant, Immigrant or Refugee status
- d. Free or reduced lunch
- e. Individualized Education Plan (IEP) for special education
- f. Gifted
- g. LEP Program of service
- h. 1st year in a U.S. school (LEP1)
- i. LEP on 2 year monitoring status (LEPX1 or LEPX2)
- j. English language proficiency assessment data (IELA)
- k. Academic achievement data
- i. Classroom grades
- ii. ISAT, IRI or other equivalents state assessments

2. SMS will create a school improvement planning checklist as per sample in Idaho LEP Program Guide.

3. SMS will use the following grading procedures for students participating in LEP programs:

- a. Students will be required, with accommodations, to meet established academic standards and graduation requirements adopted by the Board.
- b. SMS will utilize a report card developed by the teachers and Principal to indicate growth as well as achievement. All SMS students will be evaluated on the same platform so parents will be able to detect whether their student is growing in each academic area throughout the year. Students with limited language will be gaining growth tools so their evaluation will typically reflect growth more than achievement.

4. Meet at the minimum with teachers and parents twice a year to discuss LEP progress. Translation and interpretation services will be provided as needed to enhance parent involvement.

E. Budget

SMS will use LEP funds, if qualified, to employ certified personnel as needed to help students meet proficiency. The LEP funds will also be used to purchase supplies and curriculum to be used specifically to aid the LEP learners in meeting proficiency.

SMS will use the SIOP instructional approach, Sheltered Instruction Observation Protocol. SIOP is a combination of content-based ESL/Structured Immersion and Sheltered Instruction. The SIOP model is useful as a part of a program for pre-service and in-service professional development; as a lesson planner for sheltered content lessons; as a training resource for faculty; and as an observation and evaluation measure for site-based administrators, supervisors of student teachers and researchers who evaluate teachers.

SMS will use key components of the Twin Falls School District's LEP program. For example, they provide annual training of K-12 staff at faculty meetings and professional development days utilizing trained instructional coaches. SMS staff will receive ongoing SIOP training and implementation will be monitored by trained administrators/staff.

SMS will provide an Integrated ESL/Inclusion ESL/Sheltered ESL program. An integrated ESL program provides language-assistant services in the mainstream classroom as much as possible. Specialized staffs work closely with classroom teachers to provide services. Classroom teachers modify materials, team-teach, and use peer tutors along with instructional aides to provide services. ESL teachers serve as resources to the classroom teacher. Specialized ESL methodology and materials are incorporated into classroom activities as much as possible.

Are all LEP students being assessed using the IELA: (1) IELA/Placement for new students and (2) IELA/spring to determine growth?

Do LEP students have an Educational Learning Plan (ELP), inclusive of language goals and benchmarks, if they are given accommodations or adaptations within the classroom and subsequently on assessments?

Is the school using ISAT or other equivalent state assessments and language proficiency assessment data to guide instruction for individual students?

PLAN FOR SPECIAL EDUCATION

Waldorf schools experience a certain level of success with children who have been diagnosed with disabilities such as dyslexia. Because Waldorf teaches to all of the senses, there is usually a modality that a child can use to successfully learn curriculum material, which increases opportunity for learning for children with other types of disabilities and learning styles.

SMS is committed to providing eligible students with disabilities a free and appropriate public education (FAPE) consistent with appropriate laws and regulations for charter schools. We are also committed to serving children with special needs whether such children are currently or newly identified as such. SMS will not deny admission to students on the basis of disability. No student will be excluded from SMS, counseled out, or referred to other schools in the district because of their special needs.

Section 504

SMS will be responsible for identifying and serving students with a 504 Accommodation Plan. Any student who has an objectively identified disability, which substantially limits a major life activity such as learning, is eligible for accommodation by the School and shall be accommodated.

A. Free and Appropriate Public Education (FAPE)

1. Compliance with Federal and State Law. The Board acknowledges the right of every student to receive a quality education; consequently, SMS will comply with all federal and state laws associated with special education, including but not limited to, Section 504 of the Rehabilitation Act of 1973 (Section 504), the Individuals with Disabilities Act

(IDEA) of 2004, Title II of the Americans with Disabilities Act (ADA) of 1990, Idaho Code §33-2001 through 2002, §33-2004 through 2005, §33-2010, and 08.02.03.109. The SMS Special Education administrator will be the IDEA, Section 504, and ADA Compliance Officer.

2. “Idaho Special Education Manual”. SMS board will adopt as policy and comply with the most up-to-date version of the “Idaho Special Education Manual Revised 2009 and replacement pages.” The “Idaho Special Education Manual” will guide all special education services, data collection, and monitoring requirements, and will be used for identifying, evaluating, programming, developing individualized education plans, planning services, informing about the discipline policy, budgeting, and providing transportation for special needs students, as necessary. Electronic copies of the manual will be available on the school website. The section specifically addressing charter schools will be referenced, Primer on Special Education for Charter Schools revised 2007.

3. Differentiated Instruction. “Differentiated instruction” is a method of teaching that involves matching learning styles with abilities. This type of teaching is inclusive of many strategies and techniques that best suit the needs of the students at any one time. Specifically, differentiated instruction is flexible and constantly changing to meet existing needs.” All successful teachers differentiate instruction to meet their student’s needs.

All students classified as having special education needs per IDEA will be provided educational experiences that strive to meet those needs in the regular classroom as well as in special classes, seminars, or workshops. The charter school environment allows for these areas to be pursued beyond the scope of the regular curriculum, regardless of the type of special needs. SMS will accomplish this through methods including, but not limited to, clustering, competitions, consultations, curriculum compacting, special topic classes, independent study, interest-based workshops, remediation, and tutoring.

4. Policies and Procedures. The Board will adopt and maintain appropriate special education policies consistent with state and federal laws and requires legally compliant written procedures, rules, and regulations from the Principal/Designee. All students at SMS will receive appropriate services as outlined in the following provisions.

5. Resources. The Board will provide the necessary resources to ensure that students with disabilities receive adequate support from highly qualified personnel, access to all physical facilities (See also, Tab 2.III.A), and funding and contractual arrangements as required in IDEA and outlined in the students’ Individualized Education Program (IEP).

6. Enrollment. SMS will not deny enrollment to a student with a disability solely due to that student’s need for special education or related aids and services. The Board ensures that all appropriate services will be provided for students that have met minimum state and federally established eligibility criterion for such services. SMS will be prepared to provide special education services the first day of school.

7. Information Management. SMS will use the forms for special education as outlined in the “Idaho Special Education Manual.”

8. Multidisciplinary Teams. The Principal/Designee will form multidisciplinary teams to consider a student’s eligibility for special education. If a team determines the need for an evaluation by personnel, such as a school psychologist, speech therapist, or occupational therapist, not currently employed by the school, such evaluations will be contracted. As outlined in the “Idaho Special Education Manual,” Chapter 4, the team will follow all guidelines to appropriately and effectively determine student eligibility under IDEA.

9. Individualized Education Program (IEP). In compliance with federal and state law, an Individualized Education Program (IEP) multidisciplinary team will be established as set forth by IDEA and comprised of the student’s general education teacher, a special education teacher, a district representative, parents, the student when appropriate, and, if deemed of value, other knowledgeable persons. The team is responsible for developing the IEP, determining placement, and reviewing and revising the student’s IEP and placement at least annually. A certificated special education teacher, or an educational assistant under his/her supervision, will provide services in the least restrictive environment depending on the degree of intervention necessary to meet the student’s needs. The appropriate personnel will consult with the general education staff to utilize effective classroom interventions, adaptations, and modifications.

If an IEP team determines that the student’s academic needs cannot be met on site, SMS will contract with another agency to provide those services; however, the school will continue to monitor student progress.

10. Screening. The Principal/Designee will conduct a yearly Child Find activity that includes a three-step process leading to the determination of whether or not a student requires special education services. The school website, advertisements, and all published materials will indicate that the school is a public school and therefore provides a free and appropriate education to students with disabilities. As outlined in the “Idaho Special Education Manual,” SMS will:

- a. Establish and implement an ongoing Child Find system. An individual will be appointed to coordinate the development, revision, implementation, and documentation of the Child Find system. The system based on the RTI model will include scientifically research based interventions, problem identification and analysis, and progress monitoring.
- b. Ensure that staff and the school’s constituents are informed of the availability of special education services.
- c. Implement a screening process that will include any and all referrals by parents and/or other adults including teachers, counselors, or other school professionals.
- d. The implementation of the RTI process and the completion of data collection requirements will not impede or result in any delays in student referrals.

11. Least Restrictive Environments (LRE). In compliance with the “Idaho Special Education Manual” and as identified on each student’s IEP, ~~SMSSMS~~ SMS will provide special education and related services to eligible students in the Least Restrictive Environment (LRE). Depending on the needs of individual students, the LRE will be

SMS, another local school district site, or other alternative site. Multidisciplinary IEP team LRE decisions will be made individually for each student. The following criteria will be considered in the decision-making process:

- a. Based on student's IEP: The student's IEP is developed prior to the determination of the location of services and settings. The services and settings needed by each student with a disability must be based on the student's IEP and unique needs that result from his or her disability, not on the student's category of disability.
- b. Age Appropriate Peers: Students with disabilities will be educated with age-appropriate peers to the maximum extent appropriate. A student with a disability is not removed from age-appropriate general education environments solely because of needed accommodations and/or adaptations in the general education curriculum.
- c. School of Attendance: A student with a disability will be educated in the school as close as possible to the student's home and unless the IEP requires some other arrangement, the student is educated in the school he or she would attend if not disabled.
- d. Harmful Effects: Consideration will be given to any potential current or long term harmful effect on the student or on the quality of services the student needs, including the student's ability to graduate and achieve their post high-school goals.
- e. Supplementary Aids, Services, and Other IEP Considerations: A student with a disability is not removed from general education settings solely because of needed accommodations and/or adaptations in the general education curriculum. SMSSMS will provide all necessary supplemental aids, services, and other IEP considerations as deemed appropriate by the IEP Team whether or not these services are currently in place. Supplementary aids and services may include general education curriculum accommodations and/or adaptations, support from school staff, positive behavioral intervention plans, extended school year services, transportation, transition services, assistive technology services, adaptive technologies, travel and Positive Behavioral interventions.
- f. Participation in Nonacademic and Extracurricular Services and Activities: A student with a disability will be allowed to participate with students without disabilities in nonacademic and extracurricular services and activities to the maximum extent appropriate. These services and activities may include meals, recess, field trips, counseling services, athletics, transportation, health services, recreational activities special interest groups or clubs sponsored by the school, referrals to community agencies, career development, and assistance in making outside employment available. The IEP team determines the supplementary aids and services that are appropriate and necessary for the student to participate in nonacademic settings and extracurricular services and activities.

12. Research Based Curriculum and Interventions. The IEP Team will identify students' challenges early through standardized testing, curriculum-based assessment, criterion-referenced assessments, qualitative teacher observation, and ongoing data collection and analysis of students' classroom performance. The IEP Team will develop procedures to implement student interventions and provide for appropriate individualized instruction. In implementing the intervention process, the school will: 1) apply scientific, research-based curriculum and interventions, 2) measure the student's response to intervention, and 3) use the data to inform further intervention and instruction. Positive Behavior intervention Plans (PBIS) and Behavior Intervention Plans (BIPS) will be utilized when a students' behavior impacts their learning or the learning of others, either as part of the RTI process or as part of a manifestation determination.

13. Grading Procedures for Special Education Students. Students on an IEP will receive grades according to criteria set forth in Chapter 7 of "Idaho Special Education Manual:"

- a. Grades cannot be modified on the basis of special education status alone.
- b. Nondiscriminatory titles may be used for classes, report cards, and transcripts to designate adaptations or accommodations in general education classes.
- c. The provisions of adaptations or accommodations will be spelled out in the student's IEP.
- d. Collaborative grading between general education teachers and special education teachers will be encouraged and considered appropriate. The grading procedure will be spelled out in the IEP.
- e. Kindergarten through eighth-grade report cards may have asterisks or other identification stating the class was from special services, (i.e., resource room, enrichment class, speech therapy, etc.)

14. Discipline. All students, with teacher leadership, will work toward meeting the academic, cultural, behavioral and acceptable disciplinary expectations. Special Education students AND regular students will be treated fairly.

Multidisciplinary teams will be formed to address disciplinary problems by special education students. SMS employees will follow the most current "Idaho Special Education Manual" (as currently defined in Chapter 7, Section 12, and titled "Student Discipline") and the district policy manual to address these issues. The discipline policy as set forth in the "Idaho Special Education Manual" will be used by the IEP team as a guideline for establishing appropriate disciplinary procedures when misconduct of a student with a disability was:

- a. a demonstration of the disability that is an inability to understand impact and consequences or an inability to control behavior,
- b. the result of an inappropriate placement, and/or
- c. the result of the lack of provision of services consistent with the IEP and placement.

15. Contracts. SMS will contract with psychological, speech, language, occupational, and/or physical therapy providers for the provision of special education related services. Services may be provided by a paraprofessional under the direct supervision of a licensed therapist. In the event that the IEP team determines that the student's academic needs cannot be met onsite, the multidisciplinary team assigned to the student will determine the least restrictive environment complying with IDEA and advise the Board.

16. Personnel. The Board and Principal will hire necessary highly qualified personnel or contract for services to ensure proper oversight of the program and provide the required services for the students. At a minimum, the school will employ a part time special education certified teacher/coordinator.

17. Professional Development. All special education, special services, and general education personnel will receive ongoing training in order to meet the needs of students with disabilities who are enrolled in the school. The Principal/Designee will provide a comprehensive professional development plan regarding special education, IDEA, Section 504, and ADA.

18. Transportation. Transportation for special needs students will be provided as dictated by the nature of the disability, which may include specialized transportation such as door-to-door. Unless the student is capable of getting to school in the same manner as other students, the student(s) will be entitled to this transportation even if the charter school does not provide transportation to other students or if the student resides further than (15) miles by road of the school's physical location.

19. Special Programs and Interventions. Those students not reading at grade level or computing grade level mathematics will be identified and receive a variety of services including but not limited to special education, Title I, Response to Intervention (RTI), tutoring, and/or they may attend school during an extended session. In order to comply with state and federal regulations and meet student needs, SMS will administer assessments to admit students into all special programs. Students deemed at risk will be screened and monitored using the RTI model and the appropriate interventions will be implemented as needed.

20. Parent Participation. The Board understands the importance of parent participation in their child's education. Consequently, SMS will make every effort to facilitate opens lines of communication with all parents/guardians/acting custodians. In accordance with Board policy and state and federal law, parents/guardians/acting custodians will receive written notice regarding identification, evaluation, and/or placement of their child for special education or other special programs. Parents/guardians will be involved in all placement decisions regarding their child and have the right to request due process hearings at any time.

Upon request, the parent of the student will be allowed to examine all relevant records relating to the student's education and the school's identification, evaluation and/or placement decision.

If parents disagree with the determination, a request for a due process hearing may be made. ~~The process will proceed as follows:~~

Two separate processes will be followed for due process. The state due process for IDEA will be followed as per state policy and the federal process for 504 will be followed as per federal guidelines. Appeals may be taken as provided by law. The parent may contact the **Office of Civil Rights**, <https://www.seattle.gov/civilrights/contact.htm>, Central Building 810 3rd Avenue Suite 750. Seattle, WA 98104-1627. (206) 684-4500.

21. Confidentiality. SMS will protect the confidentiality of personally identifiable information at collection, storage, disclosure, and destruction stages, including all type of records covered under the definition of “education records” in 34 CFR Part 99 (the regulations implementing the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. 1232g (FERPA)).

a. Upon enrollment of a student, SMS will give notice that is adequate to fully inform parents about confidentiality of personally identifiable information. b. All persons collecting or using personally identifiable information will receive training or instruction regarding Idaho policies and procedures regarding confidentiality under Part B of the IDEA and the Family Educational Rights and Privacy Act (FERPA). c. SMS will maintain, for public inspection, a current listing of the names and positions of those employees within the school who may have access to personally identifiable information. SMS will keep a record of parties obtaining access to education records collected, maintained, or used under Part B of the IDEA (except access by parents and authorized employees of the school), including the name of the party, the date access was given, and the purpose for which the party is authorized to use the records.

Dual Enrollment

Dual enrollment of SMS students at BCSD schools is an option for all students as provided for in 33-203(7) of the Idaho State Code. While an option, families will be encouraged to enroll full time at SMS in order to ~~discouraged from dually enrolling students in SMS. It is the goal of the school and the Board to have students enrolled full time in SMS to~~ benefit most fully from their unique educational offerings. The SMS administration will work closely with ~~the~~ SMS families providing assistance based on their needs. Dual enrollment information will be provided to the public through the student handbook, at parent education and orientation meetings, and on the school website.

SMS will not accommodate BCSD students seeking dual enrollment at SMS.

TAB 4

~~MEASUREABLE STUDENT EDUCATIONAL STANDARDS (MSES) AND STANDARDIZED TESTING; METHODS FOR MEASUREING STUDENTS PROGRESS; ENSURING STATE ACCREDITATION; PROVISION FOR IMPROVEMENT PER NCLB ACCOUNTABILITY AND SCHOOL IMPROVEMENT~~

Measurable Student Educational Standards *Idaho Code § 33-5205(3)(b)*

“What matters is that you rigorously assemble evidence—quantitative or qualitative—to track your progress. If the evidence is primarily qualitative, think like a trial lawyer assembling the combined body of evidence. If the evidence is primarily quantitative, then think of yourself as a laboratory scientist assembling and assessing the data.”-Jim Collins, Good to Great and the Social Sectors 50

~~SMS, like all public charter schools in Idaho, is required to meet measurable student education standards annually. Measures such as academic growth, testing scores, passing rates in classes, attendance, retention rates, and attrition rates are some of the indicators of achievement and progress. SMS has identified the following standards and outlined methods to ensure they are adequately measured and achieved.~~

Syringa Mountain School measurable student academic standards:

Please change the bullets to numbers as it makes the MSES easier to reference.

- *By the end of the first year in operation, SMS will achieve a three star rating on the State rating system.*
- *Beginning in 2015-16, 84% of students continuously enrolled at SMS for 2 years or more, will score proficient or advanced in reading on the State Assessments for third grade through 8th grade students.**
- *Beginning in 2015-16, 84% of students continuously enrolled at SMS for 2 years or more, will score proficient or advanced in mathematics on the State Assessments for third grade through 8th grade students.**

Why don't you have a similar goal (to the reading and math proficiency MSES) for Language Arts?

- *By the end of third grade, 70% of SMS students will meet Adequate Growth in reading.** This MSES is unnecessary, since it is already measured as a part of the Academic portion of the Performance Framework, and thus, does not reflect a useful / beneficial Mission-Specific MSES. I recommend you remove it.*
- *By the end of each year, and utilizing the **Whole Child Rubrics for Reading, Writing, Speaking and Listening** SMS students will be score in the Often or Always range of proficiency. (See **Appendix V** and Adapted from the Journey Charter School). This goal needs revised. Because you do not identify the numerical target, it implies that 100% of SMS students will score in the Often or Always range. That seems unrealistic. Also, it would be helpful to give us more information about how these rubrics have been used by*

the Journey Charter School (for how long, etc) and your plan for implementing them for assessment purposes then gathering and analyzing the resulting data. This narrative won't fit well into the MSES, so I recommend making it an introduction to Appendix AA.

A 95% participation rate will be expected of SMS students on state assessments. By early and consistent communication with parents about the purposes of the assessments and communicating the assessment results to parent in a timely manner, will facilitate SMS reaching this goal. Where did your testing section from your previous petition version go? I recommend you put that content back into your petition – you need a statement that SMS students will be tested using the same standardized tests as other Idaho public school students, and the content about your testing coordinator and how data would be used were all strong. You just needed to add this to it. In putting it back in, you can either have it here or move it into the next section (it can be integrated into how the Star Rating system / SBA data will be used to measure your MSES).

Methods for Measuring Student Progress

I recommend merging and reorganizing this section (Methods for Measuring Student Progress and the following section (Additional Methods for Measuring Progress) so that they are clearer. In merging them, I recommend: 1) moving your first paragraph of your current “Multiple Measures” section so that it is an introductory paragraph directly under the blue header above, 2) changing the sub-header “Multiple Measures” to “Measuring Student Progress toward the Established MSES” and having the only content in that section be about the methods your using to track your MSES (the Star Rating system and Whole Child rubrics), 3) change your “Additional Methods for Measuring Progress” to be a sub-header within this section.

Multiple Measures:

Employing many different methods to assess students is important if we are to successfully measure the depth and breadth of what students are learning. Multiple measures provide a more complete and accurate representation of student achievement over time than is possible with a single measurement of assessment. The use of multiple measures also serves to ensure that instruction does not focus on a single test or a narrow set of learning styles.

The Star rating is a compendium of state required assessments and metrics. SMS will open the same year the Smarter Balanced Assessments will be adopted and administered to all Idaho students. SMS will participate in and prepare students to perform successfully on these measures of growth and proficiency in reading, mathematics and language arts through ensuring curriculum and instruction are aligned and that state specific and school level formative assessments are used to inform curriculum and instruction. An RTI system using a progress monitoring tool such as a student tracking system such as AIMS web will ensure teachers intervene early with struggling students. Please add a sentence (either at the beginning or end of this paragraph) that states that the Star Ratings proficiency data will be used to measure MSES #2 and #3 (and #4 if you add a Language Arts goal).

Additionally, SMS teachers will utilize Whole Child Rubrics, standards based rubrics in reading and mathematics, administered two to three times a year, to ensure students attain proficiency.

Please add a statement that the Whole Child Rubrics in Appendix AA will be used to measure MSES #5. Then please add a plan that outlines how the Whole Child Rubrics will be used,

either here or in Appendix AA (I think it will probably be best / cleanest to add the plan to Appendix AA and reference it here, but I'll leave that decision to you). Your plan should answer these questions: How will you ensure that teachers use the rubrics appropriately / objectively? What will teachers need to do to use the rubrics? Will they observe each child independently, in group setting, or use student work to identify their performance (or some combination)? Will a single observation be used or multiple? If multiple, how will each observation be tracked and how will a teacher use the combined record to score a student? How will you gather, enter, track, and analyze the data?

Teachers will develop their own informal assessments to track students progress such as rubrics for main lesson books and performance assessments for plays, projects, performances. Remove or move to the Additional Methods sub-section

SMS students may also be selected to participate in the NAEP assessments. Remove or move to the Additional Methods sub-section

Additional measures of student progress will include grades, narrative reports, developmental assessments in 1st and 2nd grade and attendance. Remove or move to the Additional Methods sub-section

Student progress will be captured and documented using student management software such as Mileposts by Silverback Learning. Remove or move to the Additional Methods sub-section

These measures of student progress have been selected recognizing that differences in a Waldorf educational program and curriculum sequence may reflect variations in scores in specific areas of the state standardized tests, especially through third grade and in reading. Even with these variations in traditional reading content instruction, the research supports through other Waldorf charter school experiences, that these are indeed achievable and rigorous. *. I recommend that you remove this (and the corresponding astericks), as it makes it appear that you may not be confident / committed to the MSES you have established. You should create MSES targets that set strong standards, while also being confident the school can meet them. If the school doesn't meet a particular MSES in a given year, you will have the opportunity to provide information / a response to our evaluation of the school that provides context.

Waldorf education approaches reading instruction from a different perspective so that instruction is synchronous with the development of the child. Reading is much more than recognizing sound/symbol relationships. For true reading to occur, there must be a corresponding inner activity that takes place as the child decodes words; that is, the child must form an inner picture of what he or she is reading so that comprehension and vocabulary develop. The rich life of the imagination is most potent in a child during kindergarten and the early primary years. And this is also the age at which the child's sense for the sound and rhythm of language is at its peak. Additionally, the foundations for reading are built through areas such as writing and drawing, oral storytelling, memorization, and sensor motor skill development. Reading instruction begins in Kindergarten. Again, I recommend you remove this – you have already provided extensive information about the Waldorf approach to teaching reading.

~~Part of each year's evaluation of the school program by the SMS Board of Directors, will include information on whether SMS attained its stated growth targets. The SMS team of teachers, administrator and support staff will annually evaluate whether the SMS program needs to make any adjustments in order to meet its Academic Performance targets.~~

~~If, in any year, SMS has not met its targets, the administration will report this to both the Board of Directors and to appropriate district staff. A written plan will be developed and presented to the Board. Following approval or modification, this plan will then be implemented by SMS the following school year.~~

Additional Methods for Measuring Students Progress Idaho Code § 33-5205(3)(d) **See notes above about the change I would make to this header.**

Assessment of student performance is one of the most powerful tools a classroom teacher or school can use to enhance student achievement and school-wide performance. Assessment as part of daily instruction is especially effective because it engages students and teachers in a frequent and ongoing reflective process. Together with an age-appropriate curriculum and brain-compatible instructional strategies, assessment *for* learning will be an integral part of the pursuit of excellence at SMS.

The school's methods of assessment, ~~in conjunction with the mandatory state assessments, discussed in detail below,~~ address students' individual strengths and weaknesses and build upon their assets versus their deficits. SMS's assessment system is supported by current educational research on multiple intelligences theory, interdisciplinary teaching, and instructional methodologies, which address the whole child.

Data from the Star Rating System will be used to measure student progress in meeting the Measurable Student Education Standards listed above. SMS will also use a variety methods to measure student progress and to evaluate all realms of the child's development, including his/her: Intellectual Capacity (mind); Physical Capacity (body); and, Social-Emotional capacity (heart). SMS educators provide a variety of descriptive feedback to students and families within a non-competitive learning environment.⁵¹

Criteria Referenced Reports are prepared for students beginning in first grade and shared with parents at key intervals throughout the year. These assessments are based upon teacher-designed classroom assessments, teacher observations of students, and other evidence gathered during instruction. The assessments include narratives with an overview of essential course work, and a discussion of the student's achievement, performance, and growth in each of the various curriculum blocks, specialty subjects, social skills and work habits. The assessments are built using a standards-based rubric. These rubrics track individual student progress in regard to specific skills and knowledge areas. Any student who is not progressing as expected will receive further teacher attention and may be supported through additional support services. These tools improve instruction in that they engage both the student and teacher in a formative, frequent, and ongoing reflective process.

Parent-Teacher Conferences for all students take place at least twice a year, or more, if dictated by individual circumstances. Parents, teachers or students may make requests for additional conferences. These conferences are essential in that they allow a complete picture of the child's performance to unfold. Moreover, they provide opportunities for teachers and parents to strengthen school-family partnerships. Conferences are especially effective as a result of the school's looping model, low teacher-student ratios, and warm community atmosphere.

Portfolios include student Main Lesson books, work samples, practice papers, written work and reports, artwork, etc. In order to insure validity, reliability and objectivity for these authentic assessments, rubrics are used to evaluate portfolio items. Rubrics are criteria-based and are developed to establish clear assignment expectations and to provide meaningful feedback to students.

Demonstrations include oral recitations, presentations, reports, performances or other demonstrations, which occur regularly beginning in first grade, by students individually as well as the class as a group.

~~**Standards-based Tests** are administered in compliance with State law regarding charter schools.~~

Standards-based Classroom Assessments are an integral part of the school-wide assessment program. Before a lesson or block is taught, the teacher will pose the question: what evidence will be collected from students in order to demonstrate their knowledge and proficiency? Once this question is posed, the assessment will be designed and the criteria developed. Keeping the desired outcomes in mind, the teacher will then be ready to plan and sequence the learning activities. Assessment will inform instruction, culminating in the creation of unique projects, exhibitions, and overall higher student achievement. ⁵² Proven instructional strategies will be used to challenge students to think at high levels and show acquired knowledge and skills.⁵³ Example strategies include: effective questioning techniques; summarizing and note-taking; collaborative work; non-linguistic representations of key concepts and vocabulary; and effective homework and practice. These strategies allow students to demonstrate their learning on a daily basis.

Letter Grades for academic content (based on tests and/or written and/or oral reports, etc.) may be used for specific classes and will be reserved for students at the middle school level. The letter grades will represent specific achievement levels based on clear criteria and will be used along with narrative reports.

School-wide Assessment Strategies: In addition to assessment of individual students, SMS will implement a variety of measures for determining the success of the overall school program and the school staff:

Strategic Planning Cycle: SMS will engage in an annual Strategic Planning process to evaluate school performance, revisit the mission and values of the school, update the school goals and student outcomes, and allocate resources for the upcoming year. Decisions that were made and innovations that occurred are examined and direction is set for the next school year. Although this process will begin immediately, it will become more formalized beginning in year three of operations using AdvancedEd Readiness Assessment tool.

External School Evaluation: ~~In addition to the annual audit,~~ The school will typically engage an independent knowledgeable evaluator from outside the school community. Evaluation includes an assessment of the instructional program as well as other qualitative and quantitative information about school operations, culture and teaching. This ensures the school is adhering to its mission and meeting its intended goals. External evaluation is also part of the AdvanceED accreditation cycle. See Strategic Planning Cycle above.

Annual School Report Card: This state required annual report of the progress of the school in multiple areas is used as a method to assess overall school progress.

Staff and Administrative Evaluations: To assure the highest quality education, the SMS staff will be observed on a regular basis and evaluated using a comprehensive and student-centered evaluation system. Student, parent and peer feedback will be part of the multiple measures used in evaluations.

Parent Involvement: The school reviews the level of parent involvement and the accomplishments over the course of a year in order to measure overall success.

Parent Surveys: As a charter school, SMS is a school of choice. Accordingly, it is essential to measure the satisfaction of and solicit feedback from the parent community. Regular parent surveys allow collection and tracking of data on several levels.

Student Surveys: Student surveys allow direct collection of information regarding the support and climate that students experience at their school. These surveys will be used both for current students as well as those leaving the school or graduating.

State Accreditation

SMS will comply with all accreditation standards and procedures of the State of Idaho (following Idaho Code 33-5205(3)(e) and 33-5210(4)(b) and will obtain accreditation through operation in accordance with Idaho Code 33-1612. Although it is not presently required, ~~SMS it is recommended and the school~~ anticipates pursuing accreditation complying with the state approved AdvancED Standards for Accreditation within three to five years of operation. The “readiness assessment” will begin in year three of operation and based on the results, the accreditation application process will be initiated. SMS recognizes that accreditation is inextricably linked to institution and educational system improvement. It is critical that SMS have an ongoing process to critically evaluate their vision, strategies, priorities, leadership, and programs and resources. SMS values the process of earning and maintaining accreditation across all the grade levels of the school, K-8.

Additionally, SMS intends to seek accreditation through the associated Waldorf accreditation organizations within the first three to five years of operation: the Association of Waldorf Schools of North America, and the Waldorf Early Childhood Association of North America.

Not to be underestimated are the roles the teacher and administrator play in ensuring appropriate assessment that drives educational decisions making in the support of students’ achievement. SMS attaches great value to growing teachers’ capacities as instructional leaders. Teachers need to be empowered to design and administer classroom-based assessments. They must be able to design assessments on a daily basis so they can provide timely and specific instructional feedback to students, families, and service providers. As assessment expert Richard Stiggins argues, classroom-based assessments are vital because teachers need *continuous* information about where each student is *now* in relation to key understandings. Periodic information, gathered once a year or even every few weeks, does not meet the immediate needs of the students and their teachers.

SMS concurs with leadership consultants Timothy Watters ⁵⁴ and Jim Collins when they assert that effective instructional leadership provided by the Administrator is essential for high student achievement. ~~SMS's Administrator collaborates closely with staff to evaluate the quality of learning.~~ Within this collaborative context, the administrator manages the assessment program by analyzing qualitative and quantitative achievement data and then regularly making recommendations to the SMS Faculty and Board.

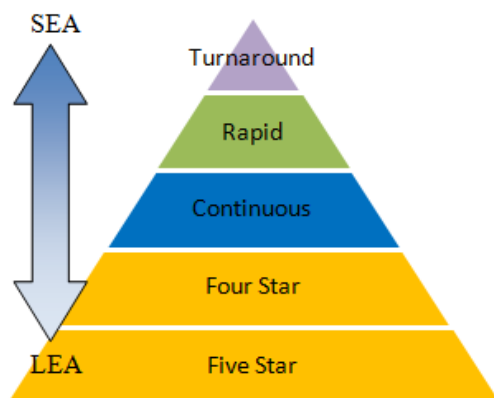
Accountability and School Improvement No Child Left Behind (NCLB)/Adequate Yearly Progress (AYP) ESEA Reauthorization

Idaho SDE has established additional accountability and improvement requirements for schools and districts under the Elementary and Secondary Education Act As Reauthorized.

In the event that SMS does not meet state achievement goals or progress over time, a team comprising the principal, staff, Board of Directors, and authorizer representative and any other additional inside/outside technical assistance will meet to develop the appropriate required school improvement plan to address student achievement using the WISE Tool (See Idaho's Accountability System outline and flow chart below). It will be the responsibility of this team with the assistance of the authorizer, to monitor the implementation of the improvement plan for improved learning and teaching and to continue to provide feedback and recommendations for strengthening ongoing student achievement. Additionally, if possible the school will request assistance from an Idaho Capacity Builder. SMS will attend pertinent State Conferences, subscribe to the SDE weekly e-letter to stay apprised of State requirements and policy changes.

~~If the school is authorized by the local school district, it will follow the authorizers' District Improvement Plan.~~ If authorized by the State Charter School Commission, the SMS Board will develop and implement the School Improvement Plan. If SMS is required to implement a Turnaround Improvement Plan, the SMS Board will work with an independent consultant to determine the most appropriate staffing model.

2012-2013 School Level Improvement Plans



School level plans are based on a continuum of performance over time with varying levels of LEA and SEA intervention and support structures. Schools with four and five star ratings are not required to submit School Improvement Plans so all the direction is at the school and LEA level. Moving along the continuum, the requirements for schools in Continuous Improvement will be less directed by the SEA than those in Rapid Improvement; however, the furthest end of the spectrum is Turnaround Planning at which point the State Department of Education will be highly involved in the planning process.

Idaho's Accountability System includes the following four measures and the rate of participation in State assessments:

1. Reading, mathematics, and language usage achievement (proficiency) designations for all students;
2. Graduation rates for all students;
3. Growth and growth toward proficiency for all students and subgroups over time; and
4. For schools with grade 12, increasing advanced opportunities and ensuring college readiness through college entrance and placement exams.

Annually SMS will receive a star rating and improvement planning category designation from the SDE. The star rating is a yearly determination but the improvement planning category will be based on the star rating plus progress over time. SMS will strive to receive a four or five star rating. In the case that its receives a lesser rating and or is required to complete a school improvement plan the following steps will be enacted.

If SMS receives a **Turnaround or Priority School** status (One-Star Rating):

A. After the State conducts an Instructional Core Focus Visit, the SMS Board, appropriate staff and the authorizer will create a Turnaround Plan based on whichever of the following permissible models would best affect the necessary change:

1. *Transformation model*, which addresses areas critical to transforming persistently low achieving schools. These areas include: developing teacher and principal leader effectiveness (depending on the track record of the principal, this could mean replacing the current administrator), implementing comprehensive instructional reform strategies, extending learning time and creating community connections, and providing operating flexibility and sustained support.
2. *Turnaround model*, which includes, among other actions, replacing the principal and rehiring up to 50% of the school's staff, adopting a new governance structure, and implementing an instructional program that is research-based and vertically aligned from one grade to the next as well as aligned with the State's academic standards. A turnaround model may also implement other strategies such as any of the required and permissible activities under the transformation model or a new school model (e.g., themed, dual language academy).
3. *Governance Partnership Model* in which the Board/school partners with an external entity to implement the Turnaround Principles and transform the governance of the school. This may include:
 - a. Agreeing to utilize services provided directly to the school by the state in lieu of a state takeover in which a diagnostic review is conducted and services are tailored specifically to the context of the school;
 - b. Purchasing the services of a lead turnaround partner that will utilize research-based strategies, that have a proven record of success with similar schools, and which shall be a key participant and decision-maker in all aspects of developing and collaborative executing the turnaround plan;

Special Rule for District Charter Schools: For a district charter school, renegotiate and significantly restructure the school's charter pending approval by the State Charter School Commission in order to implement the Turnaround Principles or revoke the charter and close the district charter school.

B. After choosing the best Turnaround Model, SMS staff, Board, and the authorizing charter entity will create a Turnaround Plan that will provide the framework for analyzing problems, identifying underlying causes and addressing instructional issues in the school that have led to persistently low student achievement outcomes. The plan will incorporate strategies based on scientifically based research that will strengthen the core academic subjects in the school and address the specific academic issues that caused SMS to be identified for the Turnaround Plan category.

SMS will use the State's WISE Tool and required indicators to write its Turnaround Plan. The indicators SMS will use in its Turnaround Plan will be tied to research-based practices that have been proven to raise achievement for all students, including English Learners, students with disabilities, and the lowest achieving students.

Once identified, SMS would remain a One-Star School (i.e., a priority school in the Turnaround Plan status) for at least three years, unless it meets the exit criteria defined in Section 2.D.v. During that period, plans will be overseen by the authorizing charter entity, approved by the State, and monitored by both the State and the authorizing charter entity. SMS may exit priority status one year early if it meets the exit criteria of two consecutive years at a Three Star rating or higher (after initial identification).

If SMS receives a Two-Star Rating, the Board and authorizing charter entity will collaborate with the State Department of Education to develop and **Rapid Improvement Plan** using the required WISE tool indicators. SMS will follow the required steps, guidelines, and procedures in a manner similar to those outlined above and as provided in the 2012-2013 Idaho Improvement Planning and Implementation Workbook. SMS must receive a three star rating for two subsequent years to be removed from this ranking.

If SMS receives a three-star rating, the Board and authorizing charter entity will collaborate with the SDE to develop a **Continuous Improvement Plan** using the required WISE Tool indicators. SMS will follow the required steps, guidelines and procedures in a manner similar to those above and as provided in the 2012-2013 Idaho Improvement Planning and Implementation Workbook. SMS must receive a higher rating for at least one year to be removed from this ranking.

If SMS is in improvement status, they will complete all requirements including the 10% set aside for professional development, notification of school choice and tutoring services for eligible students attending one and two star schools, SMART Goals and alignment of evaluation and state funding plan. Additionally, if SMS is in improvement status, the Board in conjunction with the administration (as appropriate) and authorizer, will revisit and reprioritize the operational budget to ensure resources are directed toward realizing improvement goals. This will be particularly critical to meet the requirements of Turnaround Plans, and especially if the administrator or a significant portion of the staff are replaced. Arrangements will need to be made to employ an interim administrator to assist with the transformation process. If SMS is in school improvement status, the Board will require an appropriate staff or board member to attend any state meetings or conferences that address school improvement protocol.

Annual Reports to Idaho State Board of Education and Authorized Chartering Entity

Annual reports will be made to the Idaho State ~~Department of Education~~ Board of Education and Authorized Chartering Entity, providing formative and summative data to demonstrate that the school is meeting all the performance standards prescribed by the State and other standards still under construction. This data can include emerging Idaho State Department of Education standards, benchmarks and/or SMS-developed criteria. *I think you misunderstood my recommendations – you should have removed the “Board of Education,” added the Department (which you did) and left the Authorizer (or PCSC). Also, see below about where I believe this section should be and what it should be called.*

Test results

Non-student specific results will be made available to parents and other stakeholders on the school website within 30 days of receipt of the data. Student-specific data will be shared with parents at student-led parent-teacher conferences at least twice a year. Test results refer to all state assessments including ISAT, NAEP, SBAC, SBAC Alt, IRI, IELA. *To make it a little clearer that your talking not just about your test results but your progress towards your MSES, please re-word / add that you'll report the school's progress towards your established MSES.*

I think my previous recommendation was unclear or you misunderstood it. I think you should: 1) combine this paragraph with the one above and make this paragraph (current “Test Results” first; 2) remove both titles and rename the section “Reporting Results” or similar; 3) move it to be a sub-section at the end of (but within) the Measuring Student Progress section (before the Accreditation and School Improvement sections).

Middle Level Credit System (IDAPA 08.02.03.107)

~~As SMS adds 6th grade, the Board will develop and adopt a policy that addresses the following:~~

Credit Requirements

~~SMS shall require students to attain a minimum of eighty percent (80%) of the total credits attempted before the student will be eligible for promotion to the next grade level. SMS's credit system shall require a student to attain, at a minimum, a portion of the total credits attempted in each area in which credits are attempted except for areas in which instruction is less than a school year before the student will be eligible for promotion to the next grade level.~~

~~Students failing classes in grades 7-8 (Grades 9-12 beginning with the 2014-15 school year.) will be required to repeat the class or classes of failure. The classes in which the student was successful will not be repeated. (For example, if a student repeats seventh grade English, that student may be enrolled in seventh AND eighth grade English simultaneously.)~~

Credit Recovery

~~A student who does not meet the minimum requirements of the credit system shall be given an opportunity to recover credits or complete an alternate mechanism in order to become eligible for promotion to the next grade level.~~

Alternate Mechanism

~~SMS may establish an alternate mechanism to determine eligibility for grade level promotion. The alternate mechanism shall require a student to demonstrate proficiency of the appropriate~~

~~content standards. All mechanisms established and used by SMS to demonstrate proficiency will be forwarded to the State Department of Education. Alternate mechanisms will be re-submitted to the Department when changes are made to the mechanism.~~

Attendance

~~Attendance shall be an element included in the credit system, alternate mechanism or both.~~

E. Special Education Students

~~The Individualized Education Program (IEP) team for a student who is eligible for special education services under the Individuals with Disabilities Education Improvement Act may establish alternate requirements or accommodations to credit requirements as are deemed necessary for the student to become eligible for promotion to the next grade level.~~

F. Limited English Proficient (LEP) Students

~~The Educational Learning Plan (ELP) team for a Limited English Proficient (LEP) students, as defined in Subsection 112.04.d.iv., may establish alternate requirements or accommodations to credit requirements as deemed necessary for the student to become eligible for promotion to the next grade level.~~

Plan for Middle Level Credit and Advancement Requirements

SMS's middle level credit system will include the minimum requirements as outlined by the Middle Level Task Force:

- ~~1. Students shall be required to attain a minimum of 80% of their credits in order to be promoted to the next grade level.~~
- ~~2. Students will not be allowed to lose a full year of credit in one area (i.e. a student would not be able to fail a full year of math) and automatically move on to the next grade level.~~
- ~~3. Students not meeting (or in jeopardy of not meeting) credit requirements will be given an opportunity to recover credits or complete an alternate mechanism in order to be eligible for promotion to the next grade level.~~
- ~~4. Attendance is a factor either in the credit system or the alternate mechanism or both.~~

TAB 5 GOVERNANCE, PARENTAL INVOLVEMENT, AUDITS

Governance Structure

Board of Directors

Syringa Mountain School is committed to effective school governance. The Syringa Mountain School Board is legally responsible for the school's operations. The Board shall consist of Directors elected or appointed for a three (3) year term of office as set forth in the Bylaws. The number of Directors constituting the Board of the Corporation shall be not less than five (5) or more than nine (9) Directors. The function of the Board can be described as fiscal management, policy making, advising and evaluating. The Board shall have the further duty of directing the financial means by which the educational program is conducted. They shall also ensure that the community be informed of the needs, purposes, values and status of the charter school.

Your board seats should be identified by number rather than name – if there are particular categories of board seats, you can use that within the names (ie. Board Member- Parent #1). It is best if the only place that names are identified is in your appendices (resumes, petitioning group list, etc.). Also, when do these terms start? Do you consider the “first year” to be the current year while you are petitioning, the first year after you are approved, the first year from your first annual meeting (after you have begun operations)?

Initial terms:

Directors appointed or elected in the first year of incorporation will serve terms as follows:

<u>Dr. Mary Gervase</u>	<u>1 year</u>
<u>Travis Scott</u>	<u>1 year (parent)</u>
<u>Joy Higdon Spencer</u>	<u>2 year</u>
<u>Ben Rogers</u>	<u>3 years (parent)</u>
<u>Phoebe Pilaro</u>	<u>3 years (parent)</u>
<u>Don Keller</u>	<u>2 years</u>
<u>Greg Bloomfield</u>	<u>3 years (parent)</u>

At the heart of SMS's approach to governance are seven proven principles championed by non-profit board experts Brian Carpenter and John Carver. ⁵⁵ These principles, tailored to SMS Board of Directors, are as follows:

Please note the formatting issues below – some of the Board Responsibilities are running off the page (this is true on the PDF version of the petition as well)

PRINCIPLES

Govern as Stewards

Establish Organizational Purpose

BOARD RESPONSIBILITIES

- Uphold* by-laws, Code of Conduct, operating principles, and other policies
- Develop, review and approve* policies
- Establish and uphold* the school's mission, vision, and core values
- Support and promote* the school
- Build strategic alliances*

<i>Exercise Fiduciary Responsibility</i>	<ul style="list-style-type: none">-Safeguard stakeholders' right to safety in the school-Safeguard the school's finances and property-Grow the school's resources-Support and promote fundraising efforts-Ensure legal and financial stability-Provide oversight or final approval of hiring, dismissal, job description-Provide oversight or final approval of expulsions
<i>Delegate Authority and Ensure Accountability</i>	<ul style="list-style-type: none">-Delegate authority to School Administrator-Ensure attainment of performance outcomes
<i>Speak and Act as One</i>	<ul style="list-style-type: none">-Maintain clarity of roles and responsibilities within the governance structure-Uphold by-laws, charter, code of conduct, operating principles, policies-Redirect operational conversations to appropriate staff
<i>Do What Matters Most</i>	<ul style="list-style-type: none">-Ensure Board business is done within the framework of Board meeting-Monitor school's progress on performance outcomes-Adopt Board policy-Oversee school financial health
<i>Invest in Our Capacity</i>	<ul style="list-style-type: none">-Engage in ongoing and focused professional development-Schedule capacity-building opportunities-Recruit and seat capable, qualified and diverse Board members-Evaluate Board's performance

As outlined in Section 4.7, upon taking the Oath of Directors, Board members are required to sign and abide by the Idaho Charter Board Code of Ethics (**Appendix A**). **There is no Idaho Charter Board Code of Ethics, please change the name here (just remove the Idaho so it doesn't sound like it's state-sponsored and so the title matches the one on the document OR refer to it based on its author / source).**

Non Profit Corporation

SMS is organized and operated as an Idaho non-profit corporation and is legally and operationally independent from Blaine County School District. Articles of Incorporation provide the legal parameters within which the SMS Board operates. The SMS's current by-laws provide a full description of the organization of the school. SMS is awaiting its tax-exempt status under Section 501(c)(3) by the IRS based on its charitable purposes and operations (All of the above documents found in **Appendix A**).

In keeping with the seven principles for effective governance, the Board is an autonomous governing body that delegates significant authority for operational responsibilities and execution of policy and procedure to the Administrator. The Administrator supervises all staff (see below for leadership responsibilities) and reports directly to the Board. The Board monitors the school's progress on the stated performance outcomes. The Administration collaborates closely with three key groups, the Board of Directors, the Staff Council and the Parent Advisory (see below for more information). All groups work interdependently and support each other. Detailed descriptions of the roles and responsibilities of the Administrator, Staff Council and Parent Advisory are contained in sections below.

Transition from Founding Board to Governing Board

During the initial year of operation, the SMS Board will be comprised of the Founders as listed in the Bylaws (Appendix A). As their terms expire and or vacancies arise, the Board will fill the positions as specified in Section 4 of their Bylaws. The Board will be determined through elections as outlined in the Corporate Bylaws. The Corporate Principals will remain the same unless the Articles of Incorporation are amended through the Idaho Secretary of State's office.

The role of the Founding Board focuses on envisioning and realizing the mission and vision of the school, attracting support through committed families and students, obtaining authorization, pursuing partnerships and business arrangements, and building a strong foundation and infrastructure for the school. To use an education metaphor, their work is to "get the right people on the bus." As the Founding Board's terms end, the Governing Board refocuses on student recruitment, growth, sustainability, solvency, and academic success. Capital campaigns also are part of the Governing board's work. To continue with the metaphor, the Governing Board ensures the right people are on the bus, and that the destination is worthy, achievable and successful.

How will you address the need for the founding board (who have been so closely connected to developing the mission) to pass on knowledge and a commitment to the mission and vision to new governing board members? How will you avoid "founders syndrome" (when founders struggle to let go / step back and let the school move to long-term operations)?

Board Recruitment

The SMS Board will actively seek new board members through recruitment to Board committees. Board Committees will provide a "trial" period by which prospective board members can be vetted. The Board experience/expertise matrix below will guide the Board's efforts to recruit appropriate new Board members, ensuring that Board members in total are proficient in all areas of Board leadership (Taken from Idaho State Department of Education Charter School Resources. All new board members will receive an ISBA New Board Member Packet and Waldorf education packet. An experienced member of the Board will be assigned as a mentor to each new Board member. As part of the annual Board self assessment, areas of expertise needed to enhance Board function will be identified and prospective committee members recruited accordingly.

In general, I think your board recruitment strategies are good. I like the idea of allowing potential board members to serve on certain committees, however, I think you need to flesh this idea out a bit more. Here are my recommendations and questions:

- I recommend you change the name of the committees that non-board members can serve on (currently referenced as "Board Committees" in the second line above) to "Advisory Committees" or something similar (so that it's clear that the committee is comprised of more than just board members).
- Will there be committees that non-board members cannot serve on? (It seems like that could be critical for certain types of business that the board will do.) If so, perhaps those could be called Board Committees (that way you could delineate easily between the mixed committees and the board-only committees)?
- Can you clarify what the composition of the committees will be (at least one board member and then non-board members)? Any limits on the number of non-board members that can serve on the same committee?
- I think it is important that you make the role of non-board members who serve on these committees clear – will they have decision-making (voting) authority? (I would have concerns about that.)
- Finally, with whatever you decide, make sure that your Bylaws align.

Idaho State Department of Education

Board Positions	Candidates	Organization	Title or Responsibility	Notes	Board Experience	Parent	Financial	Legal
Executive Committee								
President								
Vice President								
Secretary								
Treasurer								
Committee Chairs								
Development (fundraising strategy, sustainability)								
Marketing and Communications (website, newsletter, PR, brochure, etc.)								
Facilities Management								
Curriculum Development								
Etc.								
Committee Members								
Joanne Smith								
Etc.								
Notes:								

Add candidates by position, add as many lines as you need for each position

Mark qualifications desired for each position with an "X"

List all board positions

If candidate has a desired qualification, note in bold

If candidate has another qualification, note with "+"

Keep a candidate list separate, maybe below and plug them into positions

Board Training and Evaluation

Upon authorization, SMS will join the Idaho School Board Association (ISBA).

During the first year in office, each Board member will receive and read the materials included in the "New Board Member Packet" as well as a packet of Waldorf related information.

An initial Professional Development Calendar will be developed by the Board to ensure all pertinent ISBA training modules are completed within the first two years of operation and every two years following. The calendar will also ensure the annual board self assessment is conducted and analyzed. Board members will be expected to attend state and/or national school board conferences. Specific in depth topics will be addressed by the Board at bi-annual professional development work sessions including specific training in Waldorf education. An annual Board self assessment will identify future areas of professional development.

Board members will be encouraged to attend any staff and parent education meetings.

The Board will conduct a self assessment annually, and use this data to inform future board and committee composition as well as professional development needs. Do you have a board self-assessment tool? If not, how / when will one be established? Will the board evaluation be used for anything other than identification of future professional development (improvement of indiv members / board functioning? Recruitment?)?

Open Meeting Law and Public Records Law

SMS Board will comply with Open Meeting Law and Public Records Law.

Administrator

The Administrator's duties include tasks and responsibilities delegated by the Board. These tasks relate to three research-based, broad categories of best practices, which are crucial for the success of SMS leadership over the next five years. As the table on the following page depicts, the categories for responsibilities are: *Ensuring Organizational Focus, Developing People, and Developing the Organization.*

PRINCIPLES

Ensuring Organizational Focus

Developing People

PRINCIPAL RESPONSIBILITIES

This dimension of leadership includes setting school wide goals as well as inspiring others to pursue the school's mission, core-values, and vision into the future. Examples are:

- ☐ Expressing the school's mission, vision, and values
- ☐ Ensuring that day-to-day decisions and actions are in strong alignment with the school's mission
- ☐ Creating strong community and shared meanings
- ☐ Creating high performance expectations
- ☐ Fostering the acceptance of group goals
- ☐ Monitoring organizational performance
- ☐ Setting direction in the educational program
- ☐ Achieving and maintaining a stable and healthy financial situation
- ☐ Overseeing community outreach and student recruiting
- ☐ Supporting and promoting the school throughout the community
- ☐ Engaging parents in problem solve, decision making, goal setting as appropriate.

This aspect of leadership is about positively influencing the development of human resources in the school, including:

- ☐ Offering intellectual stimulation
- ☐ Providing support and opportunities for growth
- ☐ Being an appropriate role model
- ☐ Empowering others to make decisions
- ☐ Providing instructional coaching
- ☐ Advocating for powerful teaching and learning
- ☐ Nurturing the development of families and parents
- ☐ Selecting, coaching, and retaining excellent staff
- ☐ Facilitating meaningful staff evaluation

- ☐ Ensuring the safety of all constituents
- ☐ Overseeing student admissions, attendance and student records
- ☐ Supporting Staff Council functions such as record keeping and agendas
- ☐ Providing direction, accountability and inspiration

The principal will abide by The School Superintendent's Association, AASA's Statement of Ethics for Educational Leaders (Appendix M).

Board and Administrator Role Delineation taken from the Idaho State Department of Education Charter School Resources:

Responsibility	Board of Directors	Administrator
<i>Legal</i>	<ul style="list-style-type: none"> Exercises fiduciary role to ensure that the charter school is properly managed. The board should have a mechanism to validate information from the administrator. Maintains legal status; insures the proper paperwork is submitted to governmental agencies. Reviews financial and business dealings and exercises proper judgment in self-dealing transactions – avoidance of conflicts of interest. 	<ul style="list-style-type: none"> Must provide information to the board to demonstrate that the charter school is well managed. Compiles information for annual filing requirements. Signals to the board if either of the above situations is likely to occur.
<i>Finance and Accounting</i>	<ul style="list-style-type: none"> Approves annual budget. Reviews periodic financial reports (balance sheet, income statement, changes in financial position). Ensures that proper internal controls are in place. 	<ul style="list-style-type: none"> Prepares annual budget with input from staff and finance committee. Oversees preparation of periodic financial reports. Implements proper financial controls.

Staff

The composition of the Administrative staff will vary depending on the needs of the school. The composition is determined annually during formation of the staffing plan and budget for the upcoming year. Some positions may be employees while others may provide services as independent contractors or other outside service providers.

The Staff Council

The Staff Council delivers the educational program. As the providers of day-to-day teaching and guidance, the Staff Council is defined as the full time Class Teachers. The Staff Council typically meets each week to discuss important instructional issues.

The Staff Council also assumes a wide range of roles to support school and student success. Whether these roles are assigned formally or shared informally, they build the entire school's capacity to improve. The Staff Council work closely with all constituents to ensure the quality of educational programs and maintain the highest possible standards for teaching and learning. They act as an influential advisory body on education, policy, and program matters and are facilitated by the School Administrator. Other instructional staff may also be asked to contribute to the support of the school through meetings, committees, etc.

Roles & Responsibilities:

The following roles and responsibilities are a sampling of specific ways the Staff Council contributes to Syringa Mountain School :

1. Instructional Leaders: They design developmentally appropriate learning experiences employing the 'distinguishing features' of the SMS educational program. They use a variety of assessment tools to monitor student progress toward meeting charter performance outcomes. They advocate for principle-driven improvements to the school's educational practices as needed. For example, they serve as representatives on school committees. They build confidence by displaying competence and character, and through the conscious use of high-trust behaviors, such as "direct talk," "delivering results," and "keeping commitments."
2. Learners and Facilitators: the Staff Council functions as a community of successful learners. They develop high-quality instruction through active study and current research. They participate in professional development and pursue common goals. They exchange resources and best practices with colleagues and constituents. Through deliberate modeling and explanation, the Staff Council promotes Waldorf-inspired learning and teaching. Their efforts are focused on meeting the physical, social, and intellectual needs of all students. The Staff Council regularly engages in artistic expression and celebration to nourish themselves, one another, and the entire school community.
3. School Ambassadors: the Staff Council continuously promotes the school's mission, vision and values. They engage in effective parent-teacher communication and play an instrumental role in parent education. They hold regular class meetings, and build positive momentum for individual classes and the school as a whole. They actively promote the school and build bridges throughout the broader community. The Staff

Council participates in the life of the school, including festivals, celebrations, outreach activities and parent development opportunities. They engage parents in problem solving, decision making, goal setting as appropriate.

4. Student Advocates: the Staff Council functions as bridges between students and essential support services, activities and opportunities. They monitor students and are sensitive to behavioral or academic changes that might warrant further attention. They are advocates for the students, counseling and guiding, connecting personally, and encouraging students in an environment of acceptance and easy rapport. They offer assistance, enrichment, and remediation across grades and disciplines. They ensure the safety and well-being of students through child study, effective classroom management, and appropriate discipline procedures. They build strategic alliances with parents and other partners. They care deeply about each student, and implement an array of student interventions to ensure students achieve their full potential.

Parent Advisory

The Parent Advisory serves as an essential support group formed by parents. The Parent Advisory upholds the mission and vision of SMS, promotes the school's educational program, contributes to the physical maintenance of the school, conducts fundraising efforts, and coordinates volunteers for festivals and events, and generally provides appropriate support to parents. All parents are encouraged to attend and participate in Parent Advisory meetings. Additionally, Parent Advisory Members are called upon to advise the Board, Administrator and Staff Council in decision making, goal setting through involvement in strategic planning, annual parent surveys, parent education meetings and parent conferences. The SMS Parent Advisory will initiate a "new parents" buddy system to ensure each family is paired with a family with some Waldorf experience and understanding, and to build a strong SMS community who look out for and support each other. There early relationships can lead to strong enduring friendships for a lifetime.

Parent Involvement

Research conducted on the effects of parental involvement in the education of their children is clear--children and schools thrive when parents get involved. ⁵⁶ Positive outcomes of parental involvement include:

- ☐ Improved educational performance
- ☐ Better student behavior
- ☐ Greater feelings of ownership and commitment
- ☐ Increased parent support of the school
- ☐ Improved school attendance
- ☐ Better understanding of roles and relationships in the parent-student-school triad
- ☐ Improved student emotional well-being

One of the most unique features of Syringa Mountain School is its proposed high level of parental involvement. Beyond involvement as a member of the SMS Parent Advisory, parents/guardians who choose SMS for their children are asked to give ~~agree to give~~ an average

of five hours per month or fifty hours over the course of the school year towards various volunteer opportunities that may include: playground supervision, assisting in the classroom, site maintenance, fundraising, hospitality, room parenting, serving on a Committee, attending parent education evenings. , for example.

Additionally, parents are asked to attend education evenings that are critical to providing consistency between home and school practices, and to enhance parent understanding of Waldorf education. One of these meetings is the annual parent orientation meeting held prior to the start of each school year. It is customary for class teachers to visit their new students' homes prior to the start of each school year, with parental permission to build communication between the home and school as well as to assist the teacher in individualizing their teaching approach to each child's needs.

Lastly, the school year consists of a series of school wide festivals that solidify the ties among the community. Parents are asked to attend and volunteer at all festivals. This high level of parental involvement enables parents/guardians to become integrally involved in shaping SMS and ensuring it fulfills its overall mission.

In order to provide all parents/guardians with the opportunity to be informed about and participate in school level decision-making, information about the SMS Board meetings, agendas, curriculum and activities is readily available to all families through regular electronic communication, newsletters, bulletins, and at parent education meetings, Parent Advisory meetings, parent conferences and at school events and festivals. Parent involvement will be documented using simple sign in sheets. Teachers will contact parents directly requesting specific help and notifying them of their hours.

Parent voice will be actively sought using regular satisfaction surveys and blogs.

Annual Programmatic Operations Audits Annual Financial and Programmatic Audits: Ref. Idaho Code § 33-5205(3)(k), 33-5206(7), 33-5210(3), and 33-701(5-10)

~~Syringa Mountain School will conduct Programmatic Operations Audits in accordance with IC33-5210(3) and in compliance with IC 33-701, sections 5-10. Idaho Administrative Rule is clear that the programmatic operations audit must be submitted annually and must be submitted to the Public Charter School Commission no later than October 15th for the previous school year (IDAPA-08.03.01.301.12).~~

SMS Board of Directors complies with all school finance laws. The Board encourages public involvement and transparency by ensuring copies of annual budgets and audits are available in hard copy at the office or electronically online. The Board will also hold annual budget work sessions and encourage the public to attend through the media avenues typically employed.

Annual Financial Statement 33-701(6)

SMS's Board will have prepared and published, within one hundred twenty (120) days from the last day of each fiscal year, an annual statement of financial condition and report of the school as of the end of such fiscal year in a form prescribed by the State Superintendent of Public Instruction. Such

annual statement shall include, but not be limited to, the amounts of money budgeted and received and from what sources, and the amounts budgeted and expended for salaries and other expenses by category. Salaries may be reported in gross amount. SMS shall have available at the school office, upon request, a full and complete list of vendors and the amount paid to each and a list of the number of teachers paid at each of the several stated gross salary levels in effect in the district.

Additional or Supplementary Statements and Reports

Nothing herein provided shall be construed as limiting any school as to any additional or supplementary statements and reports it may elect to make for the purpose of informing the public of its financial operations, either as to form, content, method, or frequency; and if all the information required herein to be published shall have been published as provided herein at regular intervals during the fiscal year covering successive portions of the fiscal year, then such information may be omitted from the annual statement of financial condition and report for such portions of the fiscal year as already have been reported.

Publication of Annual Financial Statement IC33-701(5)

The annual statement of financial condition and report shall be published on the SMS website and within the time above prescribed in one (1) issue of a newspaper printed and published within the district, or, if there be none, then in a newspaper as provided in section 60-106, Idaho Code, published within the district, or, if there be none, then in a newspaper as provided in section 60-106, Idaho Code, in the county in which the school district is located, or, if more than one (1) newspaper is published in said district or county, then in the newspaper most likely to give best general notice of the contents of such annual statement of financial condition and report to the residents of said district.

Certification of Annual Financial Statement

The SMS Board chairman, clerk, and treasurer shall certify the annual statement of financial condition and report to be true and correct, and the certification shall be included in each published statement.

Failure to Prepare and/or Publish Annual Financial Statement

In the event the SMS Board shall fail to prepare or cause to be prepared or to publish the annual statement of financial condition and report as herein required, the State Superintendent of Public Instruction shall cause the same to be prepared and published, and the cost thereof shall be an obligation of SMS. One (1) copy of the annual statement of financial condition and report shall be retained in the Office of the Clerk of the Board, where the same shall be open at all times to examination and inspection by any person.

Financial Audit IC33-701(6)

1. SMS will cause to be made a full and complete audit of the financial statements of the school as required in section 67-450B, Idaho Code.
2. The auditor shall be employed on written contract.
3. One (1) copy of the audit report shall be filed with the State Department of Education, after its acceptance by the Board, but not later than November 10. If the audit report is not received by the State Department of Education by November 10, the Department may withhold all or a portion of the district's November 15 distribution made pursuant to section 33-1009, Idaho Code, for noncompliance with the audit report deadline. Provided however,

SMS may appeal to the State Board of Education for reconsideration, in which case the State Board of Education may reinstate or adjust the funds withheld.

4. In the event the State Department of Education requests further explanation or additional information regarding SMS's audit report, SMS shall provide a full and complete response to the State Department of Education within thirty (30) days of receipt of the State Department's request. If SMS fails to respond within the thirty (30) day time limit, the State Department of Education may withhold all or a portion of SMS's next scheduled distribution to be made pursuant to section 33-1009, Idaho Code. Provided however, SMS may appeal to the State Board of Education for reconsideration, in which case the State Board of Education may reinstate or adjust the funds withheld.

5. The audit will be included in an annual report to the Authorized Chartering Entity, after approval by the Board, and submitted no later than October 15.

Required Report Filing IC33-701(7)

SMS will annually submit a report to the Authorizer that contains the fiscal and programmatic audit, a report on student progress based on the educational measures, and the accreditation report if conducted as per IC33-5206(7).

Destruction or Cancellation of Checks or Warrants IC33-701(8)

SMS will order the destruction of any canceled check or warrant, or any form of claim or voucher which has been paid, at any time after five (5) years from the date the same was canceled and paid;

Budget Review IC 33-701(9)

SMS will facilitate the review of the school budget periodically and make appropriate budget adjustments to reflect the availability of funds and the requirements of the school. Any person or persons proposing a budget adjustment under this section shall notify in writing each member of the Board one (1) week prior to the meeting at which such proposal will be made. Prior to the final vote on such a proposal, notice shall be posted and published once, as prescribed in section 33-402, Idaho Code. A budget adjustment shall not be approved unless voted affirmatively by sixty percent (60%) of the members of the Board. Such amended budgets shall be submitted to the State Superintendent of Public Instruction;

General Funds IC33-701(10)

The SMS Board agrees to invest any money coming into the hands of the school in investments permitted by section 67-1210, Idaho Code. Unless otherwise provided by law, any interest or profits accruing from the investment of any funds shall be credited to the general fund of the school.

Programmatic Audit

~~During the February or March Board meeting, SMS's Board, with assistance from the Principal, will appoint a committee consisting of least one Board member, the Principal, one teacher, two SMS parents, and two persons at large (not affiliated with SMS) who will conduct a programmatic audit each year targeting the parameters of this petition. The audit will be conducted as required by section 33-5205(3)(k), Idaho Code, and the conclusions will be~~

August 15, 2013

~~reported to the Authorized Chartering Entity with suggestions for policy and program changes intended to improve the educational services provided to the students.~~

~~The programmatic audit report will also be included in an annual report to the Authorized Chartering Entity and submitted no later than October 15.~~

TAB 6 EMPLOYEE QUALIFICATIONS, HEALTH AND SAFETY, STUDENT
DISCIPLINE, EMPLOYEES: BENEFITS, STATUS, CONTRACTS

Employee Qualifications:

The faculty and staff at SMS will strive to develop inquiring, knowledgeable and caring young people who help to create a better and more peaceful world through intercultural understanding and respect through adherence to Idaho State Code and the Waldorf Methods curriculum offered.

The following information deals in particular with regulations that may affect our faculty or staff members. Other information is included as minimum requirements for the charter school to function with the level of autonomy and freedom intended by the Charter Schools Act.

SMS reserves the right to create, revise, implement, and enforce all non-substantive policies, procedures, and provisions of its organization and operations at any time during the charter period. Substantive policies, procedure, and provisions shall be subject to creation or modification according to rights of law.

Full-time employees at SMS will meet or exceed qualifications required by the State of Idaho. In order to be considered for employment, individuals will meet, but not be limited to, the following requirements:

- Employees will be required to possess personal characteristics, knowledge, experience, and expertise consistent with the philosophy, mission, and expectations of SMS.
- Teachers will possess an Idaho teaching certificate, permit, or other document equivalent to that which a teacher in other Idaho public schools would be required to hold as well as be highly qualified as defined by the SDE. They will also be pursuing their separate Waldorf certification.
- Administrators will be certified in accordance with Idaho statute.
- All teacher applicants will be required to complete a standard application and interview procedure.
- Other employees will be required to hold expertise in their field and an ability and interest in working with children of all ages and backgrounds, and their families and be highly qualified as defined by the SDE where appropriate.
- The school's employment procedures will fully comply with Idaho Code, including criminal record summaries and fingerprinting. All employees, including volunteers working with individual students or on a one to one basis with students ~~staff members~~ will submit a criminal history check fingerprint card to the Office of Certification at the State Department of Education. This includes substitute teachers, custodians, paraprofessionals, volunteers, etc.
- All Board of Directors is required to undergo criminal background checks.
- All teachers and administrators will be on a written contract in a form approved by the State Superintendent of Public Instruction (Idaho Code 33-5206(4)).

- SMS reserves the right to seek waivers or limited certification options as provided by rule of the State Board of Education when deemed in the best interests of the education program.
- SMS reserves the right to hire any person for temporary or part-time assistance under the direct supervision of certified staff members. This provision is intended to allow various community experts and other specialized persons who may not hold certification to contribute to the school according to their talents, experience, creativity and expertise. The ultimate goal is to employ highly qualified educators as defined by the SDE and as appropriate to the position. All temporary staff will be required to pass a background check.

Transfer Rights of Employees

Syringa Mountain School will be its own Local Education Agency (LEA). No employee transfer rights apply between SMS and any other school district. **Please delete this. You cover Transfer Rights on pg. 116 (which is the appropriate location per the rubric / Administrative Rule).**

~~The transfer rights of an employee choosing to work at SMS and the rights of such employees to return to any non-charter school after employment at SMS will be dependent upon the school district from which an employee might transfer. SMS claims no transfer rights. The Board for SMS will provide coverage for their employees with the Public Employee Retirement System, federal social security, unemployment insurance, and worker's compensation insurance.~~

Collective Bargaining

Teachers and staff at Syringa Mountain School will be a separate unit for purposes of collective bargaining.

Health and Safety Procedures

Syringa Mountain School will provide a facility and adopt policies that meet all required city, state and federal health, accessibility, safety, fire and building codes for public schools, including but not limited to the following:

- The facility will pass inspection by fire and safety officials using the same guidelines for all public schools;
- Fire and evacuation drills will be conducted during the first week of school, monthly and during the first week back after extended breaks;
- Maps illustrating fire exit routes will be posted near the exit in every room;
- All staff will be trained in procedures outlined in the public schools' Emergency Handbook;
- All visitors and volunteers will be required to check in at the office and to wear an identification badge;
- Student check out during the school day will require the person picking up the child to sign the child out at the office and to produce appropriate photo identification;
- All state rules and regulations for student safety will be followed;
- A health/nurse room will be furnished and supplied adequately for the number of students in the school. Eventually, a certified nurse will be hired;
- Health records highlighting chronic issues will be held on each student and made available in emergencies;
- Emergency contact numbers will be maintained on all students;

- All staff will be trained in universal medical and health precautions;
- SMS will adopt a policy regarding use/possession of illegal substances consistent with policy of the chartering district; and,
- All employees will be screened by law enforcement agencies with a criminal history/background check.

Student Discipline

SMS is committed to a safe learning environment. Student's expectations for appropriate behavior are high and will be communicated to students, parents and teachers through training, the student handbook and everyday practice. The school-wide philosophy that will be implemented for discipline will follow the "Love and Logic" approach as well as Compassionate Communication (**Appendix U**).

The Love and Logic program is a classroom management approach to working with students that:

1. Puts teachers in control
2. Teaches students to think for themselves
3. Raises the level of student responsibility
4. Prepares students to function effectively in a society filled with temptations, decisions, and consequences.

Teachers and staff follow three basic rules when using Love and Logic, which are:

1. Use enforceable limits
2. Provide choices within limits
3. Apply consequences with empathy.

Denial of Attendance to a Student:

Per Idaho Code 33-205, the school's Board of Directors may deny enrollment to SMS to any student who is habitually truant, or who is incorrigible, or whose conduct, in the judgment of the Board is such as to be continuously disruptive of school discipline, or of the instructional effectiveness of the school, or whose presence in the school is detrimental to the health and safety of other students or who has been expelled from another school district in this state or any other state. Any pupil having been denied enrollment or expelled may be enrolled or readmitted to the school by the Board of Directors upon such reasonable conditions as may be prescribed by the Board; but such enrollment or readmission shall not prevent the Board from again expelling such pupil for cause.

No pupil shall be expelled nor denied enrollment without the Board of Directors having first given written notice to the parent or guardian of the pupil, which notice shall state the grounds for the proposed expulsion or denial of enrollment and the time and place where such parent or guardian may appear to contest the action of the Board to deny school attendance, and which notice shall also state the rights of the pupil to be represented by counsel, to produce witnesses and submit evidence on his own behalf, and to cross-examine any adult witnesses who may appear against him. Within a reasonable period of time following such notification, the Board of

Directors shall grant the pupil and his parents or guardian a full and fair hearing on the proposed expulsion or denial of enrollment. However, the Board shall allow a reasonable period of time between such notification and the holding of such hearing to allow the pupil and his parents or guardian to prepare their response to the charge. Discipline of students with disabilities shall be in accordance with the requirements of federal law Part B of the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act. Any pupil who is within the age of compulsory attendance, who is expelled or denied enrollment as herein provided, shall come under the purview of the juvenile corrections act, and an authorized representative of the Board shall, within five (5) days, give written notice of the pupil's expulsion to the prosecuting attorney of the county of the pupil's residence.

Procedure by which Students can be Suspended, Expelled and Reenrolled:

SMS will assemble a student handbook (**Appendix P**) following state law (Idaho Code 33-205) that outlines a "code of conduct," including expectations and consequences for unacceptable behavior. Suspension or expulsion will be considered only as the final option in a series of efforts to avoid such measures, including but not limited to the following steps, in chronological order:

Step 1: Parent/guardian notification by teacher/staff (written and/or verbal).

Step 2: Parent/guardian notification by teacher/staff/principal (written and/or verbal) and possible parent/teacher/principal conference.

Step 3: Possible suspension and prior to suspension if needed the principal shall grant an informal hearing on the reasons for the suspension and the opportunity to challenge those reasons. Parent notification of suspension not to exceed five (5) school days in length.

Re-admission after conference with Student/Parent/Principal.

Possible additional ten (10) days suspension by the school's Board of Directors and provided that on a finding by the school's Board of Directors that immediate return to school attendance by the suspended student would be detrimental to other pupils' health, welfare or safety, the Board of Directors may extend the suspension for an additional five (5) school days. Reenrollment will occur after holding a conference with the student/ parent/principal and reviewing students attitude and behavior history, activities during suspension, recommendations by counselor, teacher, student advocate. Step 4: Expulsion (Idaho code 33-205) by school's Board of Directors by written notice to the parent/guardian of the pupil stating the grounds for expulsion and the time and place where such parent/guardian may appear to contest the action of the Board. Length of expulsion to be determined by school's Board.

Step 5: Reenrollment will occur after meeting with school's Board of Directors/principal prior to end of expulsion, and reviewing students' attitude and behavior history, activities during expulsion, recommendations by counselor, teacher, student advocate.

Drug and Alcohol Use Policy

SMS will comply with Idaho Code Section 33-210. In keeping with the federal regulations established by the Drug Free Workplace Act of 1988, SMS is committed to the concept of having a drug-free work and student environment. It is our intent that programs and activities be planned and carried out by the professional staff that will enable the school to achieve this goal.

The primary focus of our program shall be educational in nature, with instruction geared to discourage student experimentation of any mood-altering substance. A companion focus of this program shall be aimed to assist students who have made unacceptable choices regarding any controlled substance. A necessary part of the latter focus is an attitude among teachers and other staff members that one of our responsibilities is to assist those students who need help in overcoming their potentially addictive behaviors. We believe that it is possible to have a totally drug-free environment in the school setting. If a student cannot, or will not, commit to responsible behavior to help achieve this goal, several sanctions may be imposed as a disciplinary measure. They include, but are not limited to, the following:

- Parent or guardian contacted
- Referral to assistance, such as counselors and/or health professionals
- Referral to an outside agency for chemical dependency assessment and/or treatment
- Suspension from school
- Expulsion from school

A. Referral Policy

When there is reasonable cause to believe that a student illegally uses, sells, distributes, or possesses drug paraphernalia, drugs, alcohol, or other mood-altering substances in school, on or adjacent to school property, or at school functions, the student will be subject to the disciplinary procedures contained in this regulation. As used in this policy, reasonable cause shall mean the existence of specific observable evidence or behaviors that can be described. Observable behaviors may include chronic attendance problems, sleeping in class, erratic behavior, inappropriate comments, drop in grades, defiance of or disrespect toward authority, or motor coordination problems. Possession of alcoholic beverages, drugs or drug paraphernalia is also considered as evidence. Evidence shall include, but not be limited to, smell of alcohol, or other mood-altering substances, impaired speech, impaired coordination or other recognizable characteristics unusual for the particular student.

B. Procedures

SMS will send staff to training to identify drug, alcohol, and mood-altering substance use. Staff will refer such information to the principal through appropriate procedures. To develop reasonable cause for taking action, the following procedures may be indicated.

- Documented behaviors or indicators of drug, alcohol or mood-altering substance use.
- Possession of alcohol or other illegal drugs
- All procedures are to be performed with discretion and documented.
- Refusal to submit to a request to any of the procedures may result in disciplinary action.

C. Disciplinary Procedure

1. First Offense for Use or Possession (K-8)
 - Parent or guardian will be contacted;
 - Student will be suspended for 5 days;

- Suspension may be modified if the student participates in and follows the recommendations of an assessment by a certified drug/alcohol agency. A release of information would also be required;
 - Law enforcement agency shall be contacted; and,
 - If the student does not complete the recommendations of the assessment, then the remainder of the 5-day suspension will go into effect.
2. Second Offense for Use or Possession (K-8)
- Parent or guardian will be contacted;
 - Board of Directors may be petitioned for expulsion of student;
 - Law enforcement agency shall be contacted; and,
 - Child Protection Services (C.P.S.) may be contacted.
3. Third Offense for Use or Possession (K-8)
- Parent or guardian will be contacted;
 - The student shall be suspended and the Board of Directors will be petitioned for expulsion of the student;
 - Law enforcement agency shall be contacted; and,
 - Child Protection Services (C.P.S.) will be contacted.
4. First Offense for Selling or Delivering (K-8)
- Parent or guardian will be contacted;
 - Law enforcement agency shall be contacted;
 - The student will be suspended and the Board of Directors will be petitioned for expulsion of the student; and,
 - Child Protective Services (C.P.S.) may be contacted.

Health and Safety Procedures: Ref. Idaho Code § 33-5205(3)(h) You currently have two Health and Safety sections – one here, and one earlier in this Tab (before Student Discipline, which is where it should be). Please merge them, as they are currently repetitive.

SMS complies with the provisions of Idaho Code to ensure the health and safety of staff and students by implementing health and safety policies and procedures. The policy/procedure in its entirety may be found in SMS's Policy Manual, the bulk of which will be modeled after the “Charter School Model Policy Manual” created by the Idaho School Board Association.

The SMS Board and SMS Staff strive to create a learning environment that is conducive to active, imaginative learning. SMS will provide a positive, safe, engaging school climate that includes school life, facilities, relationships, teaching and learning, and the school environment. Peer-reviewed educational research has consistently demonstrated that a positive school climate is associated with academic achievement, effective risk prevention efforts and positive youth development. (See A Review of School Climate 2013, from the National School Climate Center, [57](#)

SMS Definition of School Climate?

School climate refers to the quality and character of school life. School climate is based on patterns of students', parents' and school personnel's experience of school life and reflects norms, goals, values, interpersonal relationships, teaching and learning practices, and organizational structures. A sustainable, positive school climate fosters youth development and learning necessary for a productive, contributing and satisfying life in a democratic society. This climate includes:

- Norms, values and expectations that support people feeling socially, emotionally and physically safe.

- People are engaged and respected.
- Students, families and educators work together to develop, live and contribute to a shared school vision.
- Educators model and nurture attitudes that emphasize the benefits and satisfaction gained from learning.
- Each person contributes to the operations of the school and the care of the physical environment.

(This definition of school climate and a positive, sustained school climate were consensually developed by the National School Climate Council that NSCC co-leads with the Education Commission of the States.)

Components of a School Climate

Upon authorization, the Board will adopt policies/procedures in the following areas referencing the ISBA, BCSD and Sage International School policies. (See sample policies below)

SMS will provide a facility and adopt policies that meet all required city, state and federal health, accessibility, safety, fire and building codes for public schools, including but not limited to the following:

1. Provide for inspection of the facility in compliance with Idaho Code § 39-4130, and adopt policies to meet all required city, state, and federal health, accessibility, safety, fire, and building codes for public schools.
2. The facility will pass inspection by fire and safety officials using the same guidelines for all public schools;
3. Fire and evacuation drills will be conducted during the first week of school, monthly and during the first week back after extended breaks;
4. Maps illustrating fire exit routes will be posted near the exit in every room;
5. All staff will be trained in procedures outlined in the public schools' Emergency Hand-book;
6. All visitors and volunteers will be required to check in at the office and to wear an identification badge;
7. Student check out during the school day will require the person picking up the child to sign the child out at the office and to produce appropriate photo identification;
8. All state rules and regulations for student safety will be followed;
9. A health/nurse room will be furnished and supplied adequately for the number of students in the school.
10. Health records highlighting chronic issues will be held on each student and made available in emergencies;
11. Emergency contact numbers will be maintained on all students;
12. Require that all students show proof of immunization before being enrolled at SMS or have an exemption signed by a parent or legal guardian.
13. All staff will be trained in universal medical and health precautions including communicable diseases;
14. First aid kits will be furnished, easily accessed and a portable first aid kit taken for all off campus excursions.
15. SMS will adopt a policies addressing bullying/harassment
16. All employees will be screened by law enforcement agencies.

17. Adopt and implement a comprehensive set of health, safety, and risk management policies. These policies will be developed in consultation with SMS's insurance carriers and at a minimum address the above and the following items:

- a. Policies and procedures for response to natural disasters and emergencies, including fires and bomb threats.
- b. Policies relating to preventing contact with blood-borne pathogens.
- c. A policy requiring that all staff receives training in emergency response, including appropriate "first responder" training. All staff will be trained in emergency response protocols and will be provided an emergency response binder. SMS will create an emergency response team that will develop school protocols and procedures. The team will meet at least twice a year to review the protocols and recommend needed changes.
- d. Policies relating to the administration of prescription drugs and other medicine.
- e. A policy that the school will be housed in a facility that has received fire marshal approval and has been evaluated by a qualified structural engineer who has determined the facilities present no substantial safety hazard.
- f. Policies establishing that the school functions as a gun-, drug-, alcohol-, and tobacco-free workplace.

17. SMS will develop a policy regarding internet usage and comply with all requirements set forth in the Children's Internet Protection Act. See **Appendix P** Student Handbook for Digital citizenship agreement.

18. SMS will include the following Media Viewing Policy:

The violence, consumerism and passive entertainment that are taken for granted in today's mass-media culture do not support the well being of children. The cumulative effect of repeated exposure to television, video games, movies, radio and computers can negatively impact a child's development. At Desert Marigold, we strongly encourage parents to take full responsibility for determining the type and extent of screen viewing (video games, game-boy, x-box, computers, etc.), and media exposure (television and DVD) their children receive. Your child's teachers will be providing information regarding media use and your child's education and engaging you in a dialogue that we hope will be stimulating and rewarding. Our goal in doing so is to do our utmost to create a learning environment that is conducive to active, imaginative learning.

Our recommended guidelines regarding media use are as follows:

- 1. For children in preschool and kindergarten: None, or as little as possible.
- 2. For children in grades 1 – 3: No television, video games, computers or movies during the school week; minimal parent-directed media use on weekends and during vacations.
- 3. For students in grades 4 – 8: No television or video games or computers in the morning before school; minimal parent-directed media use during the school week; parental involvement in determining appropriate media and computer-use choices at all other times.

19. Denial of Attendance to a Student: This is repetitive – it should be merged into the similar sub-section of the Student Discipline section earlier in this Tab.

Per Idaho Code 33-205, the school's Board of Directors may deny enrollment to SMS to any student who is habitually truant, or who is incorrigible, or whose conduct, in the judgment of the Board is such as to be continuously disruptive of school discipline, or of the instructional effectiveness of the school, or whose presence in the school is detrimental to the health and safety of other students or who has been expelled from another school district in this state or any other state. Any pupil having been denied enrollment or expelled may be enrolled or readmitted to the school by the Board of Directors upon such reasonable conditions as may be prescribed by the Board; but such enrollment or readmission shall not prevent the Board from again expelling such pupil for cause.

No pupil shall be expelled nor denied enrollment without the Board of Directors having first given written notice to the parent or guardian of the pupil, which notice shall state the grounds for the proposed expulsion or denial of enrollment and the time and place where such parent or guardian may appear to contest the action of the Board to deny school attendance, and which notice shall also state the rights of the pupil to be represented by counsel, to produce witnesses and submit evidence on his own behalf, and to cross-examine any adult witnesses who may appear against him. Within a reasonable period of time following such notification, the Board of Directors shall grant the pupil and his parents or guardian a full and fair hearing on the proposed expulsion or denial of enrollment. However, the Board shall allow a reasonable period of time between such notification and the holding of such hearing to allow the pupil and his parents or guardian to prepare their response to the charge. Discipline of students with disabilities shall be in accordance with the requirements of federal law Part B of the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act. Any pupil who is within the age of compulsory attendance, who is expelled or denied enrollment as herein provided, shall come under the purview of the juvenile corrections act, and an authorized representative of the Board shall, within five (5) days, give written notice of the pupil's expulsion to the prosecuting attorney of the county of the pupil's residence.

20. Procedure by which Students can be Suspended, Expelled and Reenrolled: This is repetitive – it should be merged with the similar sub-section of the Student Discipline section earlier in this Tab.

SMS will assemble a student handbook (**Appendix P**) following state law (Idaho Code 33-205) that outlines a "code of conduct," including expectations and consequences for unacceptable behavior. Suspension or expulsion will be considered only as the final option in a series of efforts to avoid such measures, including but not limited to the following steps, in chronological order:

- Step 1: Parent/guardian notification by teacher/staff (written and/or verbal).
- Step 2: Parent/guardian notification by teacher/staff/principal (written and/or verbal) and possible parent/teacher/principal conference.
- Step 3: Possible suspension and prior to suspension if needed the principal shall grant an informal hearing on the reasons for the suspension and the opportunity to challenge those reasons. Parent notification of suspension not to exceed five (5) school days in length.

Re-admission after conference with Student/Parent/Principal.

Possible additional ten (10) days suspension by the school's Board of Directors and provided that on a finding by the school's Board of Directors that immediate return to school attendance by the suspended student would be detrimental to other pupils' health, welfare or safety, the Board of Directors may extend the suspension for an additional five (5) school days. Reenrollment will occur after holding a conference with the student/ parent/principal and reviewing students attitude and behavior history, activities during suspension, recommendations by counselor, teacher, student advocate. Step 4: Expulsion (Idaho code 33-205) by school's Board of Directors by written notice to the parent/guardian of the pupil stating the grounds for expulsion and the time and place where such parent/guardian may appear to contest the action of the Board. Length of expulsion to be determined by school's Board.

Step 5: Reenrollment will occur after meeting with school's Board of Directors/principal prior to end of expulsion, and reviewing students' attitude and behavior history, activities during expulsion, recommendations by counselor, teacher, student advocate.

21. Drug and Alcohol Use Policy This is repetitive – it should be merged with the similar sub-section of the Student Discipline section earlier in this Tab.

SMS will comply with Idaho Code Section 33-210. In keeping with the federal regulations established by the Drug Free Workplace Act of 1988, WRWMS is committed to the concept of having a drug-free work and student environment. It is our intent that programs and activities be planned and carried out by the professional staff that will enable the school to achieve this goal.

The primary focus of our program shall be educational in nature, with instruction geared to discourage student experimentation of any mood-altering substance. A companion focus of this program shall be aimed to assist students who have made unacceptable choices regarding any controlled substance. A necessary part of the latter focus is an attitude among teachers and other staff members that one of our responsibilities is to assist those students who need help in overcoming their potentially addictive behaviors. We believe that it is possible to have a totally drug-free environment in the school setting. If a student cannot, or will not, commit to responsible behavior to help achieve this goal, several sanctions may be imposed as a disciplinary measure. They include, but are not limited to, the following:

- Parent or guardian contacted
- Referral to assistance, such as counselors and/or health professionals
- Referral to an outside agency for chemical dependency assessment and/or treatment
- Suspension from school
- Expulsion from school

Referral Policy This is repetitive – it should be merged with the similar sub-section of the Student Discipline section earlier in this Tab.

When there is reasonable cause to believe that a student illegally uses, sells, distributes, or possesses drug paraphernalia, drugs, alcohol, or other mood-altering substances in school, on or adjacent to school property, or at school functions, the student will be subject to the disciplinary procedures contained in this regulation. As used in this policy, reasonable cause shall mean the existence of specific observable evidence or behaviors that can be described. Observable behaviors may include chronic attendance problems, sleeping in class, erratic behavior, inappropriate comments, drop in grades, defiance of or disrespect toward authority, or motor coordination

problems. Possession of alcoholic beverages, drugs or drug paraphernalia is also considered as evidence. Evidence shall include, but not be limited to, smell of alcohol, or other mood-altering substances, impaired speech, impaired coordination or other recognizable characteristics unusual for the particular student.

B. Procedures This is repetitive – it should be merged with the similar sub-section of the Student Discipline section earlier in this Tab.

SMS will send staff to training to identify drug, alcohol, and mood-altering substance use. Staff will refer such information to the principal through appropriate procedures. To develop reasonable cause for taking action, the following procedures may be indicated.

- Documented behaviors or indicators of drug, alcohol or mood-altering substance use.
- Possession of alcohol or other illegal drugs
- All procedures are to be performed with discretion and documented.
- Refusal to submit to a request to any of the procedures may result in disciplinary action.

C. Disciplinary Procedure

1. First Offense for Use or Possession (K-8)
 - Parent or guardian will be contacted;
 - Student will be suspended for 5 days;
 - Suspension may be modified if the student participates in and follows the recommendations of an assessment by a certified drug/alcohol agency. A release of information would also be required;
 - Law enforcement agency shall be contacted; and,
 - If the student does not complete the recommendations of the assessment, then the remainder of the 5-day suspension will go into effect.
2. Second Offense for Use or Possession (K-8)
 - Parent or guardian will be contacted;
 - Board of Directors may be petitioned for expulsion of student;
 - Law enforcement agency shall be contacted; and,
 - Child Protection Services (C.P.S.) may be contacted.
3. Third Offense for Use or Possession (K-8)
 - Parent or guardian will be contacted;
 - The student shall be suspended and the Board of Directors will be petitioned for expulsion of the student;
 - Law enforcement agency shall be contacted; and,
 - Child Protection Services (C.P.S.) will be contacted.
4. First Offense for Selling or Delivering (K-8)
 - Parent or guardian will be contacted;
 - Law enforcement agency shall be contacted;
 - The student will be suspended and the Board of Directors will be petitioned for expulsion of the student; and,
 - Child Protective Services (C.P.S.) may be contacted.

22. Weapons, Fireworks, and Dangerous Instruments: This should be merged into the Student Discipline section earlier in this Tab.

Possession, handling, or transporting a firearm, dirk knife, bowie knife, dagger, metal knuckles, or any deadly and dangerous weapons as defined in Section 921 of Title 18 of the United States Code, including any knife, any explosive, including firecrackers, or any other dangerous object [Dangerous object is defined as any object used in a dangerous and/or inappropriate manner that may cause harm to a person or property], on or about his/her possession while on the property of the WRWMS, while engaged in a school activity on other property, and/or while riding school-provided transportation.

Causing or attempting to cause physical injury with a weapon or dangerous implement as defined in the aforementioned paragraph, or behaving in a way that could cause physical injury to any person is in violation of this policy.

Violation of the weapons policy will result in immediate suspension and expulsion for a minimum of one year or as determined by the Board on a case by-case basis. The suspension and expulsion includes no participation in or watching of any school activity on school property. The suspended or expelled student may not be present on school property at any time. This may be modified only by the Board.

23. Suicide prevention IDAPA 08.02.03.160 (Policy included in Appendix Q.)

Student Discipline (Taken from Student Handbook, Appendix P). You may delete this section, since you already cover Love and Logic above

SMS models their student discipline practices and procedures after Non-violent Communication protocol and Teaching With Love and Logic (See Appendix U).

Expectations in Early Childhood Classes(Classroom management) Please move this entire section (current pages 112 through the Shared Discipline section on page 114) and merge it in with the early part of the Student Discipline section near the beginning of this Tab (with the Love and Logic info and before Denial of Attendance on page 103)

Discipline at SMS emphasizes a positive approach where the young child is gradually led toward an experience of self discipline. We expect children to behave in an age appropriate, respectful way towards adults, classmates, and school and personal property. Teachers use discretion in handling each circumstance using the following guidelines:

Respectful, Calm & Clear Communication: We keep our language simple and try not to use too many words. We use simple, basic imaginations and metaphors to get our point across and avoid over-intellectualizing.

Encouraging Messages: We tell the children what they CAN do as an alternative to what they are not allowed to do. We also, take note when their behavior is exceptionally pleasing or helpful. We try to avoid empty praise but specific encouragement is excellent.

Model Problem Solving Skills and Corrective Behavior: Children in early childhood operate out of the mode of imitation. Modeling for them how to navigate through situations that they have not yet developed the “know how” for is far more effective than talking to them about what to do.

SMS uses the strategy: **MODEL – REMOVE – REDEEM – REINTRODUCE**

Natural and Logical Consequences: We avoid non-related consequences, i.e. taking away a toy for hitting. Instead we choose consequences that correlate to the child's misdeed, i.e. for hitting the child may become 'the doctor' to heal the injured, to fix what has been broken or rest when the ears must be too tired to work right.

Clear, Immediate, Calm Action: We believe that there is no "wrong" behavior... just behavior that is out of its right time, place, and intensity. It is our goal to guide the children through direct modeling and engaging the imagination toward a better understanding of positive and harmonious behavior. For example, there is absolutely nothing wrong with wanting to speak with a friend; in fact, friendship is something to be cherished! However, speaking to a friend in the middle of a story or ring time may not be the best time or place to do so. Part of our task as educators is to help children appreciate when to engage and when to refrain and how to bring the correct level of intensity to each situation. All of the redirection, guidance and correction in the classroom are built around this idea.

1. When a situation occurs which requires disciplinary action, the first step is to right the wrong. If someone is hurt, the child responsible for the hurt is asked to give aid, such as bringing an ice pack or laying on a "healing hand". The teacher reminds the child that "hands are for good work and play," or "we use kind and gentle words." If the child easily forgets classroom rules, he or she will work in close contact with a teacher or assistant.
2. If the incident is one to cause deeper concern, or if a student continues to be disruptive and/ or exhibits discourteous behavior, (taking age appropriate behavior into consideration) the teacher contacts the parents to discuss the situation. At this time the teacher may ask parents to be prepared to remove the child from school before dismissal time if the problem behavior occurs again. This action makes it clear to the child and all students in the class that such behavior is not tolerated.
3. In certain cases as deemed necessary by the teacher, a meeting is arranged with parents, teacher and, if necessary, an additional member of the faculty or staff. Parents and teachers work together as a team to prepare a written course of action. This plan outlines steps to be taken at home and at school to address the child's behavior and to help him or her to move in a more positive direction.
4. If the undesirable behavior persists parents may be asked to keep the child at home until a meeting with a Care Group, made up of several Faculty members, can be arranged. The Care Group may ask parents to seek professional help for their child such as counseling, medical help or assessment by an expert in child development. A written agreement outlining the required course of action will need to be signed by the parents before the child returns to the classroom.
5. If the problem persists and professional help is not utilized or not utilized sufficiently enough to address the student's problems, the parents may be required to withdraw their child from the school.

Grades Class Expectations

1. No Crosstalk Allowed! This means everyone is expected to pay reverent attention to whoever is speaking. No interruptions.
2. No wandering around the classroom. Everyone stays seated unless they have communicated with the teacher first. We use sign language to communicate our needs.
3. We raise our hand before speaking aloud.
4. We use respectful and courteous speech. The children are welcome to have their own opinions, feelings, and express themselves freely. However, they must find a way to communicate that does not disrespect others. This includes a respectful tone of voice.
5. We use our words first – always! The children are expected to problem solve issues on their own – or at least try to do so before grabbing a teacher.
6. Absolutely no hitting, kicking, scratching or biting at any time! We have a zero tolerance policy regarding violence in the Grades Program. The students are old enough to regulate and redirect their behavior. The student will receive an immediate consequence and lose their recess privileges for the day. In extreme cases or repeated incidents, parents will be notified. In extreme circumstances (deliberate or repeated acts of aggression/anger) the student will be sent home immediately from school.
7. Everyone helps at lunch time cleanup, chore time, and recess clean up! No one is exempt from their daily obligations. We maintain our classroom daily. Please see chore wheel for specific chores.
8. The game or play stops when someone is hurt. All play stops until the injured party is safely away from the rest of the play.
9. The children may have water bottles at their cubbies..

Problem solving protocol and Fair Trade: Our protocol for empowering children to problem solve on their own follows: Always ask the student bringing the concern “Did you talk to your friend first before coming to me?” If their answer is “no” send them back to speak directly with their peers. If the answer is “yes” – go check with the other party and ask if they were consulted.

If at this point, they are unable to resolve the issue, an adult will step in and assist.

The philosophy behind this method:

It teaches children to evaluate the seriousness of an incident: is it something that they can resolve with their friends or is it a big enough issue to bring in an adult? It teaches direct communication and begins to build strong inter-personal skills. It discourages gossip and mean spirited speech. It eliminates the endless tattling that often occurs around 7/8 year olds.

If they play during work time, then they work during play time! Our classrooms operate under the **Fair Trade system**. The students understand that their behavior can either contribute to or detract from the learning environment. If they behave in such a way that they are detracting from the classroom experience, they will have to do something that contributes to SMS during their free time. (Chores, work, something helpful – there’s always so much to do!)

Shared Discipline

When a parent is on site with their child, they are responsible for their child's safety. All animal pastures, corrals and coops are off limits after school dismissal each day, unless accompanied by a SMS staff member. After school hours, please admire and cajole our animals from outside their fences.

Prohibited items/activities This should be merged into the appropriate part of the Student Discipline section earlier in this Tab.

The following are not permitted in school or on school grounds:

- Pocketknives (unless approved by a teacher for a specific project) and other potentially dangerous items.
- Riding bikes or scooters during school hours unless sanctioned and supervised by a teacher.
- Chewing gum.
- Using music players, electronic games, etc.
- Playing ball, riding bikes and scooters, or roller-blades inside the school building.
- Excessive wrestling or roughhousing.
- Throwing rocks and other hard objects. Snowball throws are permitted with teacher permission and supervision.
- Using sticks for sword fights unless supervised by a teacher.
- Sleds with metals runners and sliding or sledding head first.
- Hard balls.
- Using swings, ropes and other playground equipment in a manner that puts anyone at risk.

Employees

Benefits: Provision Regarding PERSI, Federal Social Security, Unemployment Insurance, and Worker's Compensation Insurance *Idaho Code 33-5205(3)(m)*

Syringa Mountain School will comply with all state and federal laws addressing employment benefits and insurance. At a minimum, employees will be covered by unemployment and worker's compensation insurance, will have federal social security withheld along with the employer's matching contributions, will be covered under the Public Employee Retirement System of Idaho (PERSI), and will be offered health insurance. It is the intent of Syringa Mountain School to offer competitive wages and benefits so that it can recruit and retain talented employees to shape children who will become the leaders of our future

All employees who currently are members of PERSI will continue their participation. All new employees will become members of PERSI. Employees will contribute at the rate established by PERSI. All employees will contribute to the Social Security System. SMS will make all employer contributions as required by PERSI and Federal Social Security. SMS will also pay for worker's compensation insurance, unemployment insurance, and any other payroll obligations of an employer as required by Idaho Code § 33-1279. SMS will also allow for accumulation of sick leave as allowed by Idaho Code § 33-1217. The Board will provide health insurance and may

establish other benefits. The Board will develop a process to ensure that all employees are enrolled in or covered by health insurance, either through the school provided plan or some alternate plan.

Status

Transfer Rights *Idaho Code §§ 33-5205(3)(o)*

SMS is its own Local Education Agency (LEA). No employee transfer rights apply between SMS and any other school district.

Professional Opportunities

All employees will undergo an annual performance review. SMS teachers are required to be Idaho certified as well as pursuing ongoing Waldorf certification. SMS will provide extensive professional opportunities annually to its teaching staff to include:

- ☐ Pre-service training in Waldorf education prior to the start of school.
- ☐ Mentoring during the school year.
- ☐ Hiring teachers who are multiply endorsed and who will loop with their students over multiple years.
- ☐ Common planning times and time before or after school to collaborate and coordinate their instruction.
- ☐ Peer observation opportunities.

The first sentence of this section (above) refers to employees undergoing annual performance reviews. Is there an appendix related to evaluation procedures? If so, you should reference it somewhere in this Tab. Also, please note that this content in this section has font that is two different sizes.

Annual summer professional development occurs with teachers attending either the Michael Institute or Rudolf Steiner College for annual two week intensives in the upcoming grade level they will be preparing to teach. Additionally, specials teachers will attend courses specific to their discipline through the Steiner College.

We have selected the **Michael Institute**, in Portland, Oregon, to deliver our needed **Waldorf certification training**. This is four year training program that occurs onsite during the summers and through online assignments throughout the school year. The director of the Michael Institute, John Miles, will also be contracted to provide onsite mentoring. The convenience of the program location being offered to us just one state over combined with the program's rigor has convinced us that this is a meaningful way to equip our team of teachers to be ready to take on the challenge of opening a cutting edge public Waldorf charter school.

We have selected the **Rudolf Steiner College**, in Sacramento, California, to deliver our **specialized Waldorf certification training**. Rudolf Steiner College is one of America's leading Waldorf teacher education colleges established in 1976. Their programs are designed to meet the professional development needs of our specialty teachers with 2-3 week summer intensives in Spanish Teaching, Remedial Reading, At Risk Students, Arts/Handwork Instruction, and Waldorf Education for Public School Teachers.

Professional development will occur throughout the school year through child study, staff meetings, parent education evenings, special guest speakers and individual teacher mentoring.

Resources for Professional Development

In addition to the scheduled professional development outlined in Appendix M, a substantial amount of professional development resources is available online, either for free or at a discounted cost. A professional library will be maintained on site and electronically.

Contracts *Idaho Code § 33-5206(4)*

All certificated staff will be required to sign a written contract with SMS. Contracts will be in a form approved by the Idaho State Superintendent of Public Instruction. The contract is conditional upon valid certification. A copy of all teacher contracts and certificates for all certified teachers or staff members will be on file in the school office. Job announcements and all other hiring and employment practices will be free of any unlawful discriminatory language or practices.

Background Checks *Idaho Code §§ 33-130 33-512 and 33-5210(4)(d)*

All employees, subcontractors, board members, and volunteers who work with students independently will undergo state of Idaho criminal background checks and FBI fingerprinting checks. One fingerprint card will be submitted to the Office of Certification at the State Department of Education. Subcontractors will pay for their own background checks. SMS will pay for background checks for all employees, volunteers and board members.

Assessing Board, Administration, Teacher, and Staff Performance Evaluation of the Board of Directors This title is very confusing.

Board Self Study

The evaluation of the Board of Directors will take place one month before elections are scheduled. The evaluations will be self-evaluations provided by the ISBA and the Board will be guided through the process by the ISBA. Please move this – information about board evaluation should be in Tab 5 near board training.

Evaluation of the Administration The evaluation sections (this one and the following one on teachers and staff) should be right after the professional development section.

The evaluation of the administration will take place annually before the end of June. See **Appendix M** for specific administrator evaluation tools.

Evaluation of Teachers and Staff

Teacher and staff performance will be evaluated in accordance with Idaho state law and the State Department of Education policies. SMS will develop an evaluation process based the Danielson model for teacher evaluation or whatever model the state may mandate in the future. All teacher evaluations will be conducted at least once a year by a certified administrator according to the SDE timeline. See teacher evaluation tools in **Appendix M**.

TAB 7

ADMISSION PROCEDURES, ENROLLMENT OPPORTUNITIES, DISCIPLINARY PROCEDURES, PUBLIC SCHOOL ATTENDANCE ALTERNATIVE, ENROLLMENT OPPORTUNITIES, STUDENT HANDBOOK

Admission and Enrollment Procedures This header doesn't really make sense with the content that is underneath it. Perhaps move it? Or add an introduction to your Enrollment Procedures?

This first paragraph is about the same thing as the second paragraph / section – they are both referring to notification. The information is good, but I think you should move the sub-header (Process for Public Notification...) above this paragraph and then merge the content appropriately. Make sure the timeline that is currently in the first paragraph is maintained when you merge.

Syringa Mountain School will take the following steps to ensure the primary attendance area is aware of the enrollment opportunities at SMS (per Section 33-5205 (3)(s) Idaho Code). While taking into consideration the language demographics of the attendance area, at least three (3) months in advance of the enrollment deadline established by Syringa Mountain School each year, information will be posted in highly visible and prominent locations within the area of attendance. In addition, SMS shall ensure that such process includes the dissemination of press releases and/or public service announcements to media outlets that broadcast within or disseminate printed publications within the attendance area for SMS. SMS will ensure that such announcements are broadcast or published by such media outlets on not less than three (3) occasions, beginning not later than fourteen (14) days prior to the enrollment deadline each year. Finally, such enrollment information shall advise that all prospective students will be given the opportunity to enroll in the public charter school, regardless of race, color, national or ethnic origin, religion, gender, social or economic status, or special needs. (4-11-06).

Process for Public Notification of Enrollment Opportunities

The following actions will be made to notify the public of enrollment opportunities at SMS. This will may include, but is not limited to, SMS school, Mountain Express online, The Sun and the BCSD Web page updates; advertising in local newspapers Mountain Express and The Sun; postings at community centers such as the YMCA, Blaine County Recreation District, Hailey Public Library, the Community Library, public information meetings/open houses to be held prior to the start of the school year and during the school year. At each event, a record of the attendants and email addresses will be collected to follow up electronically with all interested parties and notify them of future enrollment opportunities. ~~SMS will comply with the Idaho State Board of Education rules governing charter schools, IC33-5205(3)(t)~~

I recommend changing the highlighted language back to “may” so that you are not locked in to using every specific medial outlet that you have listed (if a particular outlet becomes cost-prohibitive, you want to give the board / administration the freedom to switch)

Requests for Admission

Syringa Mountain School will comply with Section 33-5205 (3)(j) Idaho Code. A parent, guardian, or other person with legal authority to make decisions regarding school attendance on behalf of a child in this state may make a request in writing for such child to attend SMS. In the case of a family with more than one (1) child seeking to attend SMS, one written request for admission must be submitted on behalf of all siblings. The written request for admission must be submitted to, and received by, SMS on or before the enrollment deadline established by SMS. The written request for admission shall contain the name, grade level, address, and telephone number of each prospective student. If the initial capacity of SMS is insufficient to enroll all prospective students, a lottery shall be utilized to determine which prospective students will be admitted to SMS. Only those written requests for admission submitted on behalf of prospective students that are received prior to the enrollment deadline established by SMS shall be permitted in the lottery. Written requests for admission received after the established enrollment deadline will be added to the bottom of the final selection list for the appropriate grade.

Admission Preferences for Initial Enrollment

If the initial capacity of Syringa Mountain School is insufficient to enroll all prospective students, a lottery shall be utilized to determine which prospective students will be admitted to SMS. SMS will follow Idaho Code Section 33-502 (j).

Prospective students will be placed in priority groups as follows:

First Priority: ~~The first priority group of SMS will include the children of full time employees, children of the founders (provided that this admission preference shall be limited to not more than 10 percent (10%) of the total initial enrollment capacity of SMS).~~ The children of founders and full-time employees, provided that this admission preference shall be limited to not more than 10% of the total enrollment. Once the number of founders' applicants reaches the 10% limit, the remaining children of founders will not be included in this category. Once this category is filled, the remaining students will be categorized according to the highest level of preference for which they are otherwise eligible.

Second Priority: ~~The second priority group is siblings of pupils already selected by the lottery.~~ Siblings of pupils already enrolled in SMS.

Third Priority: ~~The third priority group is students who reside in the primary attendance area of SMS.~~ Prospective students residing in the primary attendance area of SMS.

Fourth Priority: ~~The fourth priority group includes students who reside outside of the primary attendance area of SMS.~~ Prospective students residing outside the primary attendance area of SMS.

~~Admission Preferences for Subsequent Enrollment Periods~~

For subsequent enrollment periods, prospective students will be placed in the following priority groups as needed for the lottery:

First Priority: Pupils returning to SMS in the second or any subsequent year of operation ~~are automatically enrolled in the appropriate grade and do not need to be selected by lottery.~~

Second Priority: The children of founders and full-time employees, provided that this admission preference shall be limited to not more than 10% of the total enrollment.

Third Priority: Siblings of pupils already enrolled in SMS.

Fourth Priority: Prospective students residing in the primary attendance area of SMS.

Fifth Priority: Prospective students residing outside the primary attendance area of SMS.

Founders and Admission Preference Taken from the Bylaws, Article 3, Section 3.2 Founders and Admission Preference: A “Founder” is defined as any person, including employees or staff of a public charter school, who make a material contribution toward the establishment of a public charter school. The criteria for determining what constitutes a material contribution shall be established by the Board of Directors. In addition, the Board shall determine in accordance with Idaho Code what admission preference, if any, shall be given to the child or children of a Founder.

Sibling definition A sibling is defined as a brother or sister living in the same household who has one or both parents in common, a half or step sibling, a foster child or a child under legal guardianship of the same parent(s). *This is good, but one final question- what do you mean by “living in the same household”? What if a students’ parents have joint custody? Will both sets of siblings (in both households) get the sibling preference or only those in the primary household (if one has been identified)?*

Enrollment Deadline

Each year ~~Syringa Mountain School~~ ~~Syringa Mountain School~~ shall establish an enrollment admissions deadline, which shall be the date by which all written requests for admission to attend SMS for the next school year must be received. The enrollment deadline cannot be changed once the enrollment information is disseminated. Applications will be accepted after the enrollment deadline either to fill open spots or to be added to the waiting list. *Why did this section get moved? I believe it should be before your Admission Preferences Section (after Requests for Admission).*

Proposed Attendance List for Lottery *Idaho Code § 33-5205(3)(j)*

~~Syringa Mountain School~~ ~~Syringa Mountain School~~ will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Proposed Attendance List for Lottery. Each year SMS will create a new attendance list containing the names of all prospective students on whose behalf a written request for admission was received in a timely manner by the public charter school, separated by grade level. Returning students will be automatically included in the attendance list unless the parents or guardians have requested otherwise. The proposed attendance list shall contain columns next to the name of each student, in which the public charter school will designate admission preferences applicable to each prospective student. The columns shall be designated “A” for returning student preference; “B” for founders and full-time employees preference; “C” for sibling preference, with a

corresponding cross-reference to each of the siblings of the prospective student; and “D” for primary attendance area preference. Names shall not be carried over from one year to the next.

Equitable Selection Process

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Equitable Selection Process. SMS will hold a lottery on or before April 30 of each year. The lottery will be held in a public forum and a disinterested party will conduct the lottery selection. If the initial capacity of SMS is insufficient to enroll all prospective students, or if capacity is insufficient to enroll all prospective students in subsequent school years, then SMS will determine the students who will be offered admission by conducting a fair and equitable lottery.

Final Selection List IDAPA Rule 08.02.04.203.09.

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Final Selection List. The names of the persons in highest order on the final selection list shall have the highest priority for admission to SMS in that grade, and shall be offered admission to SMS in such grade until all seats for that grade are filled. All student names that were not selected in the lottery will be listed after the selected students in the order established by the lottery. All openings during the school year will be filled according to the order of this list. Written requests for admission received after the established enrollment deadline will be added to the bottom of the waiting list for the appropriate grade. If there is an opening in one grade, a sibling, if any, from a late submitted application will go to the bottom of the sibling list. Waiting lists for a given school year shall not roll over to a subsequent school year.

Notification and Acceptance Process

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Notification and Acceptance Process. With respect to students selected for admission to the public charter school, within seven (7) days after conducting the selection process, SMS shall **notify send** an offer letter to the parent, guardian, or other person who submitted a request for admission on behalf of a student, advising such person that the student has been selected for admission to the public charter school. The offer will be followed by enrollment information to be completed by such student’s parent or guardian and returned to SMS by the date designated in the materials. Notifications will be by phone call, email, or letter.

The highlighting above shows a typographical error.

With respect to a prospective student **who is not eligible for admission to SMS**, SMS shall notify the parent, guardian, or other person who submitted a request for admission within seven days. The notification will explain that the prospective student is not eligible for admission but will be placed on a waiting list and may be eligible for admission at a later date if a seat becomes available. If a parent, guardian, or other person receives an offer letter on behalf of a student and declines admission, or fails to sign and return such offer in a timely manner by the date designated in such offer letter by the public charter school, then the name of such student will be

stricken from the final selection list, and the seat that opens in that grade will be made available to the next eligible student on the final selection list. If a student withdraws from SMS during the school year for any reason, then the seat that opens in that grade will be made available to the next eligible student on the final selection list.

What do you mean by “not eligible for admission” (per the highlighting above)? Are you referring to a student who was not selected for admission in the lottery process? If so, you should use that type of language. Referring to a prospective student as not eligible implies that there is a reason that you can deny attendance. As you know, the reasons for denying attendance are very limited (previous expulsions, etc.). If you are intending to reference that type of situation (where you would be denying attendance) than it seems you wouldn't be adding the student to the waiting list for future admission. Please clarify this.

Subsequent School Years

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for Subsequent School Years. The final selection list for a given school year shall not roll over to the next subsequent school year. If the capacity of the public charter school is insufficient to enroll all prospective students during the next subsequent school year, then a new equitable selection process shall be conducted by the public charter school for such school year.

Waiting List

A waiting list will be maintained and reviewed throughout the year. Students will be listed by grade and by preference categories. Any student who enrolls after the lottery will be added to the bottom of the waiting list. The waiting list will not carry over from one year to the next.

Enrollment Capacity of the Charter School Please move this to be earlier in this Tab (ideally, it should be the first section).

Syringa Mountain School expected enrollment and growth (maximum numbers per grade)

Year:	1	2	3	4	5	6	7	8	9
K (half-day)	20	20	20	20	20	20	20	20	20
K (full-day)	20	20	20	20	20	20	20	20	20
1st Grade	25	25	25	25	25	25	25	25	25
1st Grade		25	25	25	25	25	25	25	25
2nd Grade	25	25	25	25	25	25	25	25	25
2nd Grade			25	25	25	25	25	25	25
3rd Grade	25	25	25	25	25	25	25	25	25
3rd Grade				25	25	25	25	25	25
4th Grade	25	25	25	25	25	25	25	25	25
4th Grade					25	25	25	25	25
5th Grade	25	25	25	25	25	25	25	25	25
5th Grade						25	25	25	25
6th Grade		25	25	25	25	25	25	25	25
6th Grade			25	25	25	25	25	25	25
7th Grade				25	25	25	25	25	25
7th Grade					25	25	25	25	25

8th Grade						25	25	25	25
8 th Grade							25	25	25
Total	165	215	265	315	365	415	440	440	440

Syringa Mountain School will offer two kindergarten classes (one full-day and one half-day). For the full-day class, parents will cover the difference in cost from a funded half-day to full-day.

~~The anticipated Year 1 enrollment of SMS will be capped at 165 students. This figure is derived from a first year of operations configuration of:~~

- ~~• Kindergarten (two classes): 20 students each (40 total) (two half-day classes)~~
- ~~• First grade (one class): 25 students each~~
- ~~• Second grade: 25 students~~
- ~~• Third grade: 25 students~~
- ~~• Fourth grade: 25 students~~
- ~~• Fifth grade: 25 students~~

These numbers are the preferred number of students in each grade. It is our intent to allow the school to grow using a controlled growth plan on a 9 ~~10~~-year schedule. We will add one grade level beyond the fifth grade each year up to a top grade level of eighth grade. Additionally, for each year, we will add a second class of a lower grade to promote and allow for growth at the upper levels. Should enrollment approach the minimum for financial viability, the Board of Directors shall take action including, but not limited to, the following:

- Increase enrollment demand through a marketing campaign
- Increase fundraising from external sources
- Eliminate or defer expenses

Public School Attendance Alternative *Idaho Code § 33-5205(3) (n)*

Since a charter school is a public school and SMS is a new entity, not a conversion of an existing school, the attendance alternative would be the same as for all students in a public school district. The children located within the attendance area of the authorizing district will have the choice to enroll or seek admission to other educational entities, be they public, private or other. Enrollment is not mandated based upon residential proximity to SMS, but through parental choice and equitable selection.

Student Handbook and Procedure Ensuring Parental Access to Student Handbook

SMS's handbook will be finalized upon opening of the school and will be a joint effort between the administration, staff, parents and Board. The term student handbook is synonymous with parent handbook. The handbook will be distributed to all parents electronically and ~~or as a hard copy based on their preference prior to the first day of school. Prior to the start of school and as~~ As part of our registration procedures, parents will receive their handbook and be requested ~~required~~ to sign a validation form indicating that they have read and will comply with the handbook. The handbook will also be available for quick reference via the school website. See **Appendix P** for Draft Student Handbook.

You don't need the list (below) – but you can keep it if you'd like.

Contents to be included will be as follows.

- Message from the principal
- School philosophy
- School academic goals
- Staff and Board members
- Daily schedule
- Calendar
- Attendance policy
- Behavior and discipline
- Severe weather procedures and inclement weather
- Field trips
- Health, injury, or illness
- Suicide Prevention
- Medication
- Personal belongings
- Weapons and threats
- Special services
- Report cards
- Tardy policy and telephone calls
- Students leaving school grounds
- Digital citizenship, electronic network use rules, cyber bullying, parent authorization

TAB 8 ***BUSINESS PLAN, DESCRIPTION, MARKETING PLAN, MANAGEMENT PLAN, FINANCES, FINANCIAL PLAN, START-UP BUDGET, THREE YEAR OPERATING FORM, FIRST YEAR MONTH-BY-MONTH CASH FLOW, TRANSPORTATION, SCHOOL LUNCH-NUTRITION***

Business Plan Description

Syringa Mountain School is organized exclusively for charitable, educational and scientific purposes. The Articles of Incorporation for Wood River Waldorf Methods School, a Public Charter School, Inc. as filed and approved by the Secretary of State for the State of Idaho on August 30, 2012 and Doing Business As (DBA) Syringa Mountain School documentation can both be found in **Appendix A**.

SMS will initially serve kindergarten through fifth grade with plans to extend to eight grades. SMS will be located within the Blaine County School District, Idaho, and plans to open in August 2014. The Corporation is organized exclusively for educational purposes within the meaning Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provisions of any future federal income tax code. SMS will operate as a public charter school and is subject to all the rules and regulations of traditional public schools. Charter Schools face the challenges of tight budgets resulting in part from not having access to the local taxes that traditional public schools enjoy. The non-profit status is important in accessing contributions from entities that are willing to donate to the programs of cCharter sSchools.

Vision, Mission, Values See Tab 2 for full description.

1. Marketing

Pre-opening Timeline A pre-opening timeline is found in **Appendix L**.

Marketing Overview:

The purpose of the SMS Marketing Plan is to develop a consistent message and implementation process linked to our vision, mission, values; engage parents, board, staff, students, community; communicate strategically and use communication tools effectively.

According to Idaho Code § 33-5205(3)(s), all advertising and promotion processes for SMS will include the dissemination of enrollment information, in both English and other languages as required by the demographics of the area, at least three (3) months in advance of the enrollment deadline established by the public charter school each year, to be posted in highly visible and prominent locations within the area of attendance of the public charter school such as the YMCA, libraries, school facility. In addition, SMS will ensure that such process includes the dissemination of press release and/or public service announcements to media outlets that broadcast within and/or disseminate printed publications within the area of attendance of the public charter school. SMS will ensure that such announcements are broadcast and/or published by such media outlets on not less than three (3) occasions, beginning not later than fourteen (14) days prior to the enrollment deadline each year i.e. online and hard copy ads in both the Mountain Express and The Sun, radio stations KSKI, KECH FM, school website, BCSD website.

Finally, such enrollment information will advise that all prospective students will be given the opportunity to enroll in the public charter school, regardless of race, color, national or ethnic origin, religion, gender, social or economic status, or special needs.

Why is the margin further to the left for the two headers below?

Marketing Plan

I recommend adjusting the structure of your marketing plan to make it more clear and ensure that you include all of the items as outlined in the rubric. This is not a requirement, but the section currently feels jumbled / disjointed and it is difficult to read and identify your specific Marketing goals, tasks, timelines, and responsible parties (expectations per the rubric). **If you choose not to adjust the structure, please add additional narrative / information that provides more logical flow and ensures that you have all appropriate content included (or referenced).**

Here is a possible Marketing Plan structure to consider: After the PR/Marketing Committee description, I would recommend that you identify your Marketing Goals and then under each goal, provide an overview of the tasks that will be associated with it. For example, your first goal could be to “use marketing and advertising to build community awareness and admissions requests in the pre-opening stage” then you would put tasks underneath it. Some of the tasks can be (or include) references to other Tabs or Appendices (ie. Complete all in-person outreach activities as listed in Appendix...). Timelines for tasks are also expected. For pre-opening tasks, feel free to refer to the pre-opening timeline rather than duplicating the information in this tab. For ongoing goals / efforts, you should note if there is an annual deadline or if the efforts are expected to be ongoing. Annual efforts should include more than enrollment – consider whether you anticipate having any annual events or contests that you will want to publicize, how you will want to deal with annual reporting of academic results, etc.

PR/Marketing Committee

This list (below) is awkward since it doesn't include any introduction. I recommend adding one to two sentences that clarify the PR / Marketing Committee's role (perhaps remove the first item in the list and use that as a jumping off point). The intro can be short, but should state when this committee will be established (now? post-approval but pre-opening? post-operations?) who will be on this committee and what their general purpose will be (to do identify and plan PR / marketing? to identify, plan, and implement it? to interface with administrator and board on these efforts?). Are there any timelines associated with these efforts? Which are pre-opening and which are ongoing? If the pre-opening marketing tasks are in the pre-opening timeline, feel free to refer to that instead.

Also- adding bullet points will make the list easier to read.

PR/Marketing Committee formed with interested parents, teachers, students, and principal and purpose of committee published.

Develop marketing analysis; determine if areas of competition-i.e. other charter schools, or other schools proving the same or similar programming/curriculum.

Develop market description-who do we serve. Ensure broadest community including Spanish speaking families.

Identify target market-who do we want to serve?

Develop recruitment strategies and metrics based on purposes: recruitment, community support, partnerships that are mutually beneficial for the school and the partner, etc.

Complete a logo and branding plan

Website updated and redesigned.

Identify communication vehicles and strategies:

- Focus groups

- Open houses

- Public school festivals (determine which will be for school families only, and which will be open to the public, i.e. May Faire.

- Design and administer parent and student satisfaction surveys at least once annually.

- Include a question about effectiveness of the school's communication strategies.

- Create staff business cards

- Determine what social media to use and when

- Determine format and process for press releases for current events

- Create relationship with local media-keep the education reporter informed; personally invite to events.

- Host open to the public evenings with guest speakers on Waldorf education

- Volunteer program to utilize parent and local community expertise, i.e. Bee keeping

- Parent education evenings-4 held annually with parents strongly encouraged to attend

PR/Marketing calendar developed with accompanying strategies. See sample in **Appendix T**.

Determine strategy for translation of materials into other languages based on community demographics.

Enrollment and Admissions: Advertising for SMS may actively recruit students for enrollment using, but not limited to, the following methods: **You do not need to include your enrollment and admissions efforts here. Just refer to the section in Tab 7 and/or the Pre-Opening Timeline where they are already identified (but feel free to add some of these strategies into Tab 7, since you've got some new / different ones here).**

Also, some of the items in the list (news releases and articles for all school events and festivities) don't seem to be related to enrollment, but they are under an introduction about enrollment (perhaps that was intended to be a bullet in the list)? Please adjust your formatting to clarify (or per the recommendation at the beginning of this section regarding another way to structure this entire section).

Annually a variety of media outlets will be used to notify the community about the enrollment/re-enrollment and lottery process for SMS.

- ☐ Community calendars on television, radio, internet, websites and including Spanish stations

- ☐ Ads/articles in back to school edition of Mountain Express newspaper

- ☐ Open houses held three times during the year, and one held one month prior to the start of school.

- ☐ Flyers attached to products sold by local merchants.

- ☐ Information tables at local events/festivals: May Faire, Annual Christmas Bazaar.

- ☐ School website, as well as blogs, Facebook, and Twitter pages

☐ Public speaking: Chamber of Commerce, Rotary, Community Radio show, KECH news

☐ Ongoing articles in the Mountain Express and Twin Falls

☐ News releases and articles for all school events and festivities

1. Advertising with public schools located within the target area using flyers upon administrative approval, district and school websites.
2. SMS website will introduce information about the school including downloadable brochures promoting the curriculum and methods used at the school, upcoming public meetings, etc.
3. Bi-annual public informational meetings and open houses about SMS held in accordance with Idaho Statute §67-23.
4. ~~Other methods that may include: news releases, newspapers, news conferences, and newsletters, email blasts, radio station announcements, web, e-newsletters, and social media.~~
5. SMS will seek to form partnerships with other public schools to increase opportunities for our students and theirs, i.e. applying for 21st Century Learning Grant for collaborative after school offerings.
6. The building administrator will join organizations such as Rotary, the local Chamber of Commerce to increase exposure in the community for the opportunities available to students at SMS.
7. After SMS is authorized, parents who expressed interest in enrolling their children will be contacted to determine their current level and interest. They will be informed of the projected opening date, and invited to participate in the Open Enrollment process with the general public.

Ensuring all students are reached with PR/Marketing Plan

Marketing methods will always include strategies to reach at-risk and non-English speaking students as well as underserved students. This process will include all current requirements as stated in Idaho Code § 33-5205.

Attracting non-English speaking, other at-risk and underserved students are listed below:

- ☐ Ongoing articles in the Spanish only section of the Mountain Express
- ☐ Public service announcements on Spanish speaking radio program
- ☐ Spanish language enrollment information posted on SMS's website
- ☐ Posting advertising materials in English and Spanish in writing, electronically and in prominent locations (i.e. the libraries, churches, hospital, clinics, YMCS, BCRD)
- ☐ Providing materials in Spanish at all public events, whenever English materials will be distributed.
- ☐ Advertising materials will state SMS's non-discrimination policy

This list above describes marketing / advertising efforts to attract non-English speaking students, but what kinds of efforts might you implement to make sure that other groups (at-risk, special education, etc.) are aware of the opportunity? Are there any services providers in the area that you could reach out to so their families get info? Any other strategies you can put in place to target these groups?

Marketing strategies will be developed for attracting partnerships that will enhance the educational offerings of SMS. See **Appendix E** for initial partnership collaborations.

All parents, students, and staff will be surveyed annually to measure satisfaction and to answer questions concerning whether we are fulfilling our mission and vision as outlined in the Charter.

Appendix L contains additional marketing details as part of the Pre-Opening Plan. The marketing budget will rely primarily on low cost or no cost communication vehicles and strategies. The budgets (see **Appendix G and H**) contain a line item for Marketing and Advertising. *I recommend moving this to your Marketing Overview / Introduction. Also, it would help if you could provide your total anticipated (average) Marketing budget for the operational years (after pre-opening) in the narrative.*

Potential enrollment

SMS's Board of Directors has begun collecting the names of potential students. See **Appendix O** for metrics and will continue this process until the school is Authorized. At that time, the school enrollment process will officially launch. See **Appendix L** for Pre-Opening Timeline and the enrollment process. *This does not need to be here (please delete). Your potential student list should be in the appendices and referred to in Tab 2.*

The items listed in the Marketing Strategy above will be implemented upon the approval of the charter petition by the Public Charter School Commission. The marketing strategy will be a continuous process. Marketing will continue after the school opens and will be adjusted in intensity depending on whether the school has met its enrollment caps. *I recommend moving this into your Marketing Overview / Introduction. Then also make sure that any tasks that should have a timeline are either on the Pre-Opening timeline (and referred to) or have the timeline identified with the task.*

You do not need the information below about the Outreach Activities you have completed. Just state that outreach activities already completed or planned can be found in Appendix __ and provide it there.

SMS has already held four public meetings:

- November 15: Information agenda item for BCSD School Board
- April 25: Work session with BCSD School Board
- May 14: BCSD Formal Board hearing
- May 29: Public information Meeting, Community Campus

Public meetings will be scheduled with Rotary, the Chamber of Commerce and BCSD's Parent Associations for the elementary and middle schools. Initial contact has already been made.

Management - *In this section, you should briefly describe how the roles of the entities (board, administrator, staff, contractors, etc.) will interact. Describe the structure of the school's operational management and overlap / division of roles. What is the chain of command? Who decides / does what? We're *not* looking for job descriptions, but rather, information that helps us to understand how these entities will work together to ensure the school is managed and operates properly. The easiest way to do this may be to add an introduction that provides that type of narrative.*

Form of business organization – You do not need this again (it's at the beginning of the Tab)

SMS is a nonprofit and is organized exclusively for charitable, educational and scientific purposes. See Articles of Incorporation **Appendix A**).

Board of Directors Please see **Appendix D** for resumes. The following Board members are also members of the petitioning group: Dr. Mary Gervase, Joy Higdon Spencer, Ben Rogers, Travis Scott, Phoebe Pilaro. An additional Board member is Greg Bloomfield. **You can refer to the resumes and petitioning list; I recommend you remove the names from the narrative. Then give more about the role of the board in comparison to and interacting with others. What is the board's role in relation to staff? Parents? The community? With what kind operational tasks is / should the board be involved / not involved? How is their role similar to or different than administrators, teachers, or contractors? How will you decide whose will do what or who will communicate with parents or outside entities? Remember – job descriptions are not what we're looking for; rather, provide some brief descriptions of what it will practically look like.**

Administrator(s): organization chart and responsibilities is on page 16. **Given the nature of this Tab, you may want to put the actual Organizational Chart in this Tab (in addition to Tab 2), as you can then use it to describe the chain of command and interactions.**

The principal and Board of Directors will determine the school calendar, schedule and hours of operation in compliance with the requirement of providing 900 hours of instruction.

Administrative services will be provided by the principal and supplemented by other contracted services as needed. Annual programmatic operations audits and fiscal audits will be presented to the Board of Directors. The Board of Directors will serve as the liaison between SMS and the Idaho Public Charter School Commission. **You do not need to provide an overview of Administrative Services since it is covered in another Tab.**

Financial operations will be contracted out to licensed and bonded entities. Funding sources will include state allocations per pupil, federal start-up grants, private grants, business partnerships and donations.

Job descriptions of key personnel See **Appendix M**.

Staffing plan/number of employees.

The school will open with approximately 6.5 teachers (including a half time special education teacher), 1 paraprofessional, one administrator and on e office staff. See **Appendix G and H** for staffing budget and changes over time. By year three, SMS anticipates 10 teachers, 1 special education teacher, and 1 para-professional, administrator and office staff.

The SMS staffing plan will clarifyies the roles of staff, provides job descriptions, a performance management process and status reporting procedures. SMS Board has received permission from the BCSD Superintendent, Dr. Lonnie Barber, and Sage International School Principal Don Keller, to adopt BCSD-policies and procedures whenever feasible. SMSSMS will utilize as a starting place BCSD and Sage International School job descriptions and evaluation templates, adapting them to the unique needs of the charter school. Additionally, SMS will utilize the Charlotte Danielson Framework for Teacher Evaluation. See **Appendix M** for evaluation rubrics.

Facilities plan/planned capital improvements See **Tab 2** and **Appendix K**.

Operating plan/schedule of work for next year.

Our operating plan and schedule for the next year include 1) charter approval; 2) application for charter grant; 3) advertisement of charter approval and opportunities for parents, students, and staff; 4) identifying lease facilities.

Day to Day Operations: The principal of SMS will determine day-to-day operations and the Board of Directors will have oversight authority. *This is beginning to get at a key part of the types of descriptions that should be in the Management section, but it needs more depth / detail. What about the times when the lines get blurred (for instance, a parent calls a board member directly or a board member has expertise related to a particular aspect of operations but hasn't been asked by the administrator to provide assistance)? Also, this should be in one of the primary narrative sections at the beginning of the section.*

Instructional Hours: The Board will provide the minimum number of instructional hours for students at each grade level as follows:

Grades Hours

K 450

1-3 810

4-8 900

Records Management: The Secretary and/or Clerk will be the custodian of records under the supervision of the Principal/Designee. Personnel files and student files are confidential and will be disclosed only as provided in policy and/or by law. A record of persons examining/copying personnel files or student files, other than administrative staff, will be kept for each employment file and student file. All public records will be provided to the public in accordance with the Family Educational Rights and Privacy Act (FERPA), laws of the State of Idaho, and AHCS policy.

Financial

Budget:

The budget for SMS will be prepared in compliance with Idaho Code Section 33-801 and rules of the State Board of Education; will be presented at a public hearing in June of the year the school will open; and will be delivered to the State Department of Education as required on or before July 15 prior to the start of the school year. Copies of the budget will be provided to the public on our school Web site. The budget will be prepared, approved and filed using the required Idaho Financial Accounting Reporting Management System (IFARMS) format.

Start-Up and Long-Term Budget: An initial budget with forms, three-year operating budget, and first year month-by-month cash flow form are attached in **Appendix G and H**. *Please remove this reference, since you have the references to Appendices (a more clear and complete list) at the end of the Financial section.*

Income Sources: Funding sources will include state allocation per pupil, federal start-up grants, private grants, business partnerships and donations. Parent volunteers have already identified several potential sources of additional funding and will prepare proposals pending approval of the school by the authorizing chartering entity.

Working Capital and Assets: SMS does not expect to have working capital and assets until after the charter is approved. An anonymous \$500,000 pledge has been received for site and faculties costs.

Expenditures: Purchasing Process: The principal will determine procedures for procuring goods and services with approval from the Board of Directors. **This section should include the "Purchasing Procedure" rather than it being under "Revenues." Also, it seems like Expenditures and Revenues should be near each other within this section – it would make more logical sense and be easier to read.**

Payroll Processing: SMS will outsource its payroll processing as determined by the principal with approval from the Board of Directors.

Financial Management: The accounting records will be kept in accordance with generally accepted accounting principles. SMS will follow the requirements set forth by the Idaho State Department of Education, including formats for account numbering. The Board of Directors will be responsible for financial management. Sage International School is providing oversight of our financial management. See **Appendix E**. What do you mean Sage is providing oversight of your financial management? Aren't they providing financial services / business manager consulting? It would help if this was clearer

Bonding: Documentation of bonding of all personnel involved in the school's financial operations will be provided prior to the opening of the school.

Revenues: Estimates of funding sources will include state allocation as based on:

- ☐ The Support Unit Calculation for Charter Schools ☐ Salary Based Apportionment for Charter Schools
- ☐ State allocations for pupil transportation
- ☐ State allocations for technology
- ☐ State lottery

As soon as possible, SMS will notify the Idaho Department of Education's School Achievement and School Improvement, in writing, of its intention to apply for Federal Title I funds. The school will develop and implement an approved Consolidated Plan that details the programs. This plan will include, but not be limited to, a Parent Involvement Policy, Parent Compacts, participation in the state assessment and accountability system, highly qualified staff, and a scientific research-based program of support for academically at-risk students. Federal funds for Title I, Title IV-B, and the child nutrition program (if sought) will be calculated through the prescribed formulae.

SMS will follow this or a similar process for revenues:

1. Revenues will be received by the accountant/business manager, who will record the transaction in the proper account and will provide a receipt for the revenue.

2. The Principal and SMS's Board of Directors will also review the record of revenues and will approve the transactions.

The preparation for and the review of the annual financial audit will provide an additional financial safeguard.

Purchasing procedure will be in compliance with State Law, Idaho Code 33-601. The board will develop and implement policies and procedures at before February 1 of the opening year. Purchases of goods or services by SMS will follow state guidelines provided by the Idaho Department of Administration, Division of Purchasing. SMS will adhere to the policies as explained in Idaho Department of Administration's Purchasing Guides or other state purchasing guidelines that the department may publish in the future to supplant these guidelines.

Your purchasing process includes references to an accountant / business manager, but your Administrative Services section (Tab 2) does not indicate that your staffing structure will include having someone in this role. Will you be consulting with Sage for this role? If so, how will that work on a practical level?

The purchasing procedure will be as follows:

1. A request for purchase will be filled out and given to the accountant/business manager.
2. The business manager will determine if the purchase fits the specifications of the budget line item funds the request will be paid from and if there is sufficient funds in the line item for the purchase.
3. If the purchase is approved by the Principal, a purchase order will be sent to the vendor for the purchase. The Board will decide on a dollar amount that the Principal can approve without Board approval.
4. After the item has been received and inventoried, the business manager will prepare the check. All checks will be signed by one Board member.
5. The business manager will prepare monthly financial reports for the Board that will include the dispersal of funds for the purchases.
6. The yearly financial audit will also review the purchase as an additional safeguard.

Can any one board member sign checks, or is it someone specific (such as the chair or treasurer)? Is there the potential for an amount that would / should require signature by more than one board member?

Reports and Audits: SMS will conduct an independent financial audit annually. A yearly independent audit will be performed as required by Idaho statute regarding audit reporting. The SMS Principal/Business manager will provide a monthly cash-flow report and balance sheet to the Board of Directors that details revenues and expenditures for the previous month. The budget will be in the Idaho Financial Accounting Reporting Management System (IFARMS) format.

Start-up Budget: A copy of the estimated start-up budget is contained in **Appendix G.**

Three Year Estimated Budget: A copy of the three year estimated budget is contained in **Appendix H.**

First Year Month-by-Month Cash Flow: A copy of the estimated first year month-by-month cash flow is contained in **Appendix I.**

FUNDRAISING

The Board of Directors, principal, and/or parent organizations will be responsible for fundraising efforts, if implemented, to generate capital or to supplement per-pupil allocations.

The SMS Fundraising plan will identify who is responsible for fundraising, how fundraising benefits the school and community, what resources are available, and how to develop a fundraising plan. Fundraising is a shared responsibility. The Parent Advisory conducts fundraising events throughout the year, see festivals in **Appendix P**, Student Handbook. The Administrator in conjunction with the Board applies for grants. The Administrator also oversees an annual fundraising campaign to provide resources for expenses not allowed for by state funding, i.e. facilities purchase. The Board will assume responsibility for developing a Fundraising plan, and revisit and update it annually.

The SMS fundraising strategy combined with student funding revenue will create financial sustainability for the Charter School. Fund development is an ongoing, process that engages all staff and every board member in some way. This Fundraising Strategy will become part of the Strategic Plan and should be reviewed and updated on a regular basis by the Development Committee of the Board of Directors.

Fund development provides a mix of funding that will sustain basic operations, allow for expansion of educational programs, and generate sufficient cash flow to cover operating costs. Activity associated with strengthening fund development should be taking place every day at the Charter School. It is vital to the sustainability of the school to place as high a priority on fund development as any other organizational component.

To some, fund development means having a bake sale or applying for a grant. It can and should be so much more. Fund development does include those activities, but *effective* fund development produces more than money. Fund development includes building stronger relationships, helping Board members feel comfortable asking for money, and understanding the interests of Charter School donors. This overview will outline fundraising areas and will show projections of what needs to be raised in each area. Each area has a committee associated with it that will determine the goals and timeline for each fundraising activity.

The Development Committee of the Board oversees all of the fundraising activities. The importance of preparing monthly progress reports cannot be stressed enough. These reports, prepared by the Development Director, are essential to monitoring the plan by comparing the actual results of fundraising activities with the projected incomes of each area. This information allows us to focus on activities that are productive and intervene in areas that are not. Each year the Administrator, Development Director and the Board Development Committee work together on the development plan for the year to come and provide to the Board a written evaluation of the past year's development efforts.

The fundraising objectives for SMS:

Major Gifts

The Development Committee must continually strive to identify, educate and cultivate key donors who are capable of making major gifts. These are people who are either personally motivated to give because of the wonderful education the Charter School provides their children or those who are not directly involved but are impressed by what the Charter School represents. At the Charter School all students are equally important and all potential donors are worthy of equal respect. However, from a fundraising perspective it is the donors who have been identified as having the greatest capacity to give who should receive the most time and attention from the Administrator, the Development Director, and the Board. School development personnel that focus on major gifts and major donors always raise the most money. It is not simply a process of asking someone for money and getting it. Relationships must be cultivated and once these relationships develop into donors, they must be thanked, acknowledged, and kept informed of the ongoing successes of the school.

An anonymous gift has been pledged to SMS in the amount of \$500,000 for site and facility costs. See Appendix E for notification.

Timetable:

Cost:

Projected Income:

Point Person: Principal Development Director, Board of Directors

Strategies: Identify and create list of people with capacity; Development Director trains those making the ask. The Administrator along with members of the Board personally contacts major donors who have been identified by the Development Director and work to establish a relationship with them. Adequately thank donors within 48 hours.

Annual Fund

The Annual Fund Campaign consists of an annual appeal to Charter School families, relatives, alumni, and the Board of Directors that will raise significant, unrestricted revenue. This annual fundraising program will provide essential operating funds that are above and beyond state funding. Because state funding does not cover all of the annual costs of educating students the funds raised through the Annual Fund Campaign will help balance the operating budget which is the school's top priority. In the future these funds will support programs directly benefiting Charter School students such as enhancing the curriculum, supporting faculty professional development, and building repairs and maintenance. The Annual fund builds a donor database and gifts to the Annual Fund are tax deductible.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategies: Set financial goal. Develop materials (letterhead, remittance envelope).

Identify donors. Create mailing list – board, staff, faculty, relatives, friends. Create letter defining need. Thank donors within 48 hours. Ensure 100% participation by Board of Directors.

Special Events

Determine the signature events for Charter School fundraising. In addition to raising money for the school the event has the potential to be used to provide good publicity and public relations.

This event also provides the opportunity to add names to the database, identify volunteers and record the giving amounts of attendees that will be helpful for future fundraising.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategies: Establish volunteer committee(s). Determine theme, date, location. Create materials (posters, invitations, etc). Produce announcements for local newspapers and public service announcements for radio and television and Hang posters for event in area businesses. Thank donors and attendees within one week of event.

Foundation Grants

Includes written grant requests for funding as well as corporate matching gift programs which seek to maximize support for the school from business and private foundations. The approach to foundations must be based on sound research, exemplary proposal development, and establishing relationships with foundation staff.

Timetable:

Cost:

Projected Income:

Point Person: Development Director with assistance from Principal and parents

Strategies: Research grant opportunities that align with the mission of the Charter School. Make direct personal contact with Foundation staff to review all grant applications. Focus efforts where you have the best chance of receiving funds. It is important to estimate how much effort and what resources are needed to write and administer a grant versus how much funding the grant will generate. Is it worth writing a grant for?

Partnership Fundraising Options

These programs raise money for the Charter School through everyday activities such as grocery shopping.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategies: List the partnership opportunities in every newsletter. Create a plan to educate families on all of the programs.

Endowment Fund/Planned Giving (or Legacy Giving)

The Endowment Fund is the financial foundation of a school. An Endowment Fund offers opportunities for individuals to contribute to the long-term stability of the school. The money is invested and remains untouched for many years and only when there is significant interest income can that income be used for either restricted or unrestricted purposes. The principle is maintained in perpetuity. The Endowment is a permanent fund that “gives back” a portion of its annual earnings to the operating budget and provides a long term strategy for stemming steep tuition hikes and securing the schools future. Planned Giving (or Legacy Giving) allows a donor to make a gift to the school through wills, trusts, and insurance policies. This usually involves a

one on one conversation with the donor to set the terms and conditions that assist the donor with estate and tax planning.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategy: Develop investment policy for the Charter School. Educate the Charter School community about the tax consequences of contributing to an endowment. Set goal for Endowment. Create informational flyer. Conduct informational meeting for families.

Capital Campaign

A capital campaign has a limited scope and timeframe and is usually for the purpose of building a new facility or renovating an existing one, although capital campaigns can be used to fund any special project. Capital campaigns often run simultaneously with other fundraising activities. Feasibility studies to determine strategy and services of a consultant with specific expertise are often utilized to ensure success.

Timetable:

Cost:

Projected Income:

Point Person:

Strategy:

Transportation Services Ref. Idaho Code § 33-5205(3)(t) & 33-5208(4)

SMS will not ~~will try to~~ offer transportation services for students from the initial opening of the school in the 2014-15 school year. SMS will investigate transportation options once approval is obtained. If fiscally viable, services will be offered for the second year of operation, 2015-2016. SMS will coordinate with the public transportation system, Mountain Rides, as well as ask for the Parent Association to assist with carpooling. This is to ensure that lack of a transposition will not negatively affect student enrollment. (The BCSD presently has a free pass system with Mountain Rides for any BCSD student. SMS will pursue a similar arrangement).

Since you are going to look at providing transportation if “fiscally viable” in year two, have you looked into the costs? Getting one or two quotes for potential transportation, and either adding them to your appendices or referencing the average amounts in your narrative would help show that you are already working towards making an informed decision. Also, how often will you reconsider the decision regarding whether to provide transportation if you determine that you can’t afford to do it in a given year?

In Tab 10, you have a reference to a letter in the appendices that shows that you have arranged for discounted bus passes. You should include information about that in this section as well (and a reference to the appendix) while also leaving it in Tab 10. In this section, please provide more detail – Will these reduced-cost passes be available in year 1 of operations? What is the level of discount / cost for an individual student? Would the bus passes be for use by students when they are travelling to and from school? What about on field trips? What would a student need to do to get a reduced-cost pass? How will you inform families of this opportunity?

Transportation for students with special needs will be provided in accordance with requirements of state and federal law. Transportation for fieldtrips, excursions, and extracurricular activities will be provided by the school through contracted services.

At the beginning of the next paragraph you should add a phrase that makes it clear that you're not offering transportation yet – "If SMS offers transportation service" or "When SMS determines it can offer transportation services, these services will be offered to..."

SMS will provide transportation services to students within our primary attendance area, Blaine County School District (and enrolled students within 15 miles of the said charter school) when they live more than one and one-half (1 ½) miles from the facility. In accordance with Idaho Code, students who live less than one and one-half (1 ½) miles from the nearest established bus stop must provide their own transportation to such bus stop. That distance shall be determined by the nearest and best route from the junction of the driveway of the student's home and the nearest public road, to the nearest door of the building he attends, or to the bus stop, as the case may be. SMS may transport any student a lesser distance when in its judgment the age or health or safety of the student warrants. A day care center, family day care home, or a group day care facility, as defined in section 39-1102, Idaho Code, may substitute for the student's residence for student transportation to and from school. SMS will not transport students between child care facilities and home in accordance to 33-1501, Idaho Code.

Student Travel To or From an Extracurricular or Co-Curricular Activity

Unless other travel arrangements are authorized, students will board the contracted bus at the school designated as point of origin for the trip and will return to the point of origin in the bus. There will be no stops along the designated route to pick up or discharge students. The only variation allowed in this regulation is the release of students to parents in a face-to-face situation at the close of the activity before buses begin the return trip. Such release will require a signed, dated note from the parent.

School Lunch Program Ref. IDAPA 08.02.04.202, 08.03.01.401.1.0, and USDA Child Nutrition Federal Policies and Regulations

SMS will not provide nutrition services in year one. How will SMS address lunch / lunch time for students if you do not do a nutrition program? How will you communicate to parents about the non-availability of school lunch?

SMS is committed to modeling what is taught in the garden, farm and sustainability curriculum in which students learn to grow, harvest and prepare organically grown foods. The SMS board have already initiated discussion and visited Gooding School District to learn about their farm to table child nutrition program. SMS has also been in dialogue with the Blaine County School District child nutrition director (See Appendix E).

If nutrition services can be offered primarily using organic and locally grown foods and in a financially viable manner, SMS anticipates offering a school lunch program during its second year of operation, 2015-2016. It is somewhat doubtful SMS could offer an organic hot lunch program that qualifies under the guidelines of the National School Lunch Program. Are you only willing to provide a nutrition program if it can be organic and locally grown? Is there the possibility that you will provide a nutrition program that is organic and locally grown even if it

does not qualify under the National School Lunch Program? How often will you re-consider whether to provide the program if you determine that you can't afford it?

If nutrition services are offered, the appropriate application will be included in student registration/enrollment packets. SMS will follow the annual income eligibility guidelines as established by the USDA. The Board will approve policies for determining eligibility of students for free and reduced prices for meals, verification reporting, and record keeping before the implementation of such program. Any such policies will be consistent with USDA Child Nutrition Federal Policies and Regulations if school lunch is to be provided. Additionally, if provided, SMS will provide an environment that provides students with a place where they have adequate space to eat.

You state here that if the program is provided you'll make sure that students have adequate space to eat. What if you don't provide the program? Won't students need a place to eat either way?

~~initiative, any food services initially but will consider programs for a possible future date. If SMS decide to offer hot lunch~~

D. Meal Times and Scheduling

If school lunch is provided, SMS will provide:

1. Students with at least 20 minutes to eat after sitting down for lunch.
2. Meal periods scheduled at appropriate times, e.g., lunch will be scheduled between 11 a.m. and 1 p.m.
3. Lunch periods scheduled to follow recess periods (for grades kindergarten through sixth).
4. Access to water during mealtimes, at least through water fountains.
5. Access to hand washing or hand sanitizing before students eat meals or snacks.
6. Reasonable accommodations of the tooth-brushing regimens of students with special oral health needs (e.g., orthodontia or high tooth decay risk.)

Again, what will be the plan / timing / structure of lunch if SMS does not provide a nutrition program?

Governance Structure See Tab 5

~~The SMS governance structure identifies who and how decisions are made, Board of Director qualifications, recruitment and board roles and responsibilities. Tab 5 contains the governance structure of the school, including the roles of the administrator, Staff Council, and Parent Advisory. In addition to the information in Tab 5, the Founders Board will develop a Division of Roles between Board Members and Administrator matrix to facilitate the future work of the charter school. A sample matrix follows.~~

~~Appendix A contains the Bylaws outlining board responsibilities, how board business will be conducted, terms of board members, conflicts of interest, etc.~~

~~It is critical to have the right roles represented on the Board of Directors. The Board matrix below will be used as the current 5 member Founders Board adds new members.~~

TAB 10 BUSINESS ARRANGEMENTS AND PARTNERSHIPS, TERMINATION, CLOSURE PLAN ~~ADDITIONAL INFORMATION, PLAN FOR TERMINATION~~

Description of Business Arrangements and Partnerships, Including Lease Agreements

A number of business arrangements, partnerships and Lease agreements are described below and documented in Appendix E.

Since you appear to have gathered many letters (which is good) and all of them are in Appendix E, perhaps you could label them (in their individual references in this section and in the Appendices) as E1, E2, E3, E4, etc. for ease in finding them?

Preliminary discussions have been held with the BCSD as a potential authorizer regarding possible Memorandum of Understanding (MOU) for services such as transportation, special education, ELL, ESL, professional development, accounting, pay roll, school nutrition, etc. See letter from Dr. Lonnie Barber, Superintendent of Schools in Appendix E.

Since BCSD is no longer a potential authorizer, you should delete this. Also, are these discussions still ongoing since BCSD did not authorize you? If yes, just remove the highlighted language; if no, you should contact them and/or other possible providers and then update this section.

Preliminary discussion has occurred with Gooding School District Child Nutrition Services and the Blaine County School District for oversight on contracting with an outside provider for school lunch. See letter from Anji Baumann, Child Nutrition Director and Duane Sorensen, BCSD Child Nutrition Director in Appendix E.

Preliminary discussion has occurred with Sage International for accounting, payroll oversight. Once the school receives authorization, these MOU's will be developed and formalized. See letter from Don Keller in Appendix E.

SMS is in collaboration with the YMCA to offer collaborative after school programs. See letter from Jason Fry, CEO, Wood River YMCA in Appendix E.

Preliminary discussions have been held with Nurture Foundation to collaborate with SMS curriculum on farm, garden and sustainability. See letter from Amy Schlatter, Nurture Foundation Educator in Appendix E.

Preliminary discussions have been held with the Flourish Foundation See letter from Ryan Redman, President, Flourish Foundation in Appendix E. What would the Flourish Foundation be providing / what would that relationship be? You don't have to provide an extensive explanation, but the nature of the potential relationship should be clear in this section (without the reader having to flip to the appendices).

Pro bono legal assistance is being provided by Selim Star. See letter in Appendix E.

Discounted bus passes have been committed for SMS student use by Jason Miller, Director, Mountain Rides Transportation Authority. See letter in **Appendix E**. You should update your Transportation section in Tab 8 to reflect this (while also keeping it here).

The Woods Family and Kate Woods have pledged to donate the furnishings of The Mountain School to the new school. They have additionally offered to lease the school property on a short term basis if needed.

A commitment to conduct research on SMS's behalf has been committed by Boise State University, Department of Special Education and the Pesky Learning Center (PLC). See letter from Dr. Evelyn Johnson, Professor and PLC Director in **Appendix E**.

SMS is already ~~will become~~ a member of the Alliance for Public Waldorf Schools. ~~once authorization is finalized~~. This membership provides SMS access to professional development, networking, consulting, legal assistance and CCSS aligned curriculum and lesson plans. SMS has already benefitted from their assistance receiving numerous **Waldorf curriculum document aligned to assistance**. See email from Stephanie Skinner, Alliance for Public Waldorf Schools Administrative Coordinator in **Appendix E**. The highlighted area indicates a typographical / grammatical error.

SMS will follow the guidelines provided by two professional organizations, Waldorf Early Childhood Association of North America (WECAN) and Association of Waldorf Schools of North America (AWSNA) regarding the legal use of the term "Waldorf" in any school publications even though the legality of the "copyright" is inconclusive. See email from Will Stapp, Director of the Alliance for Public Waldorf Education in **Appendix E**. I'm assuming the strikethrough highlighted "SMS" is a typographical error; please correct.

Termination of the Charter Ref. Idaho Code § 33-5205(3)(u) & 5206(8)

~~**Plan for Termination:**~~ It is the responsibility of the Board of SMS to maintain communications with the Authorized Chartering Entity regarding any changes, problems, or difficulties in the operations of the school. **The Authorized Chartering Entity and SMS will resolve disputes relating to provisions of the Charter following the procedures set forth in section 33-5209, Idaho Code, and the applicable rules of the Idaho State Board of Education and the Authorized Chartering Entity for notice of defect and submission of a corrective action plan.**

Copies of any complaints filed against SMS, including lawsuits, will be provided to the Authorized Chartering Entity within five (5) business days of receipt by SMSSMS.

You can remove the highlighted section above – if you'd like to keep the first part about resolving disputes that's fine (but not necessary), but please delete the references to the notice of defect and corrective action plan process, since it is no longer in statute.

Idaho is currently creating a Closure Framework (similar to Colorado's) which will be adopted and followed as outlined in closure framework / checklists provided by the authorizer (or the Idaho Public Charter School Commission). SMS will utilize other resources (NACSA, Colorado) as supplemental information. This section isn't clear the way it's written. We're looking for you to commit to working with us and following all closure and termination procedures as outlined in any closure framework or protocol adopted by the Idaho Public

Charter School Commission. You may also include a statement (if you would like) that SMS may use other national resources as recommended by the PCSC or deemed appropriate by the board.

In case of termination, the President of the Board of Directors will be responsible for the dissolution of Syringa Mountain School and will cooperate with the Public Charter School Commission. The board will follow all state and federal laws regarding the dissolution of a nonprofit corporation and arrange for the liquidation of assets dispersing of funds to the creditors. This paragraph conflicts with the statement (below) that the board will appoint a designee. Who will be in charge of termination- the Board President or a designee?

When the board determines that the school will be terminated, the board will appoint a designee or designees to execute the termination. The designee may or may not be a Board member or the Administrator. The designee will work under the direction of the President and will coordinate the dissolution of the school. The President of the Board will arrange for the sale of assets and will use the proceeds to pay creditors. Within the month after the determination to dissolve the school, the designee will contact the parents of past and present students of how to obtain school records and/or to which school the records should be sent. The designee will send written notification to parents of students at their last known address and will email the parents at their last known email. The notification will explain how to request a transfer of student records to a specific school, where to obtain records before dissolution, and where the records will be stored after dissolution. The designee will send the records to the school that parents have requested.

Under what circumstances would the designee not be a member of the board? How will the board ensure that the designee follows appropriate procedures and is in compliance with the law if he/she is not a board member? Please note, the closure / termination process should not be the responsibility of the Administrator or staff / employees (though they can certainly assist / be involved in the process).

Within two months after the determination to dissolve the school, the designee will send the remaining student records to parents for whom the school has mailing addresses. Any student records that are still left will be sent to the school district of the student's last known address if the school district is willing. Any remaining student records will be stored in a secure location for the legal limit required by an individual or organization to be determined by the board. SMS will maintain a Facebook page or similar page stating where remaining student records can be located how the remaining student records can be obtained.

I have concerns about the highlighted section (and other items in this paragraph). If there is no proof that the student is in that district and the parent / guardian has not requested that the records be sent there, how will the parent know to reach out to that district to get the records? I recommend that you identify a process for transferring records to new schools / districts and a process for storing any records that have not been transferred at the time of termination. Additionally, you Facebook (or similar) should not state where the records are located, since that could be a risk in terms of protecting them, but rather, should provide info about who parents should contact / how they should get them.

The designee will send personnel records to all former employees of the school within one

month after the final school year. The President of the Board will arrange for the sale of assets and will use the proceeds to pay creditors. The specific details of the dissolution are found in Appendix S Dissolution.

Any items bought with federal funds will be delivered to the Public Charter School Commission and will not be used to pay creditors. The remaining assets will be distributed to creditors pursuant to Idaho Code §§ 30-3-114 and 30-3-115 of the Idaho Code. All remaining assets will be turned over to the Public Charter School Commission.

Dissolution

~~Dissolution of SMS Corporation will be conducted by SMS's Board and will follow the SMS Articles of Incorporation. The Board will establish a transition team, develop a closure plan, and assign roles. The team will establish a schedule for meetings and interim status reports.~~

~~In the event of dissolution of the school, all parents will be notified in writing. SMS will offer advice in the placing of students in alternate education settings. The Board, after seeking legal counsel, will facilitate the transition. Best practices will be followed in the eventuality of termination, using closing checklists provided by the National Alliance of Charter School Authorizers and/or Colorado Charter School Sample Closure Framework <http://www.cde.state.co.us/cdechart/DistAuthInfo.asp>.~~

Payment of Creditors

~~The Corporation will pay or adequately provide for the debts and obligations of the Corporation, pursuant to Sections 30-3-114 and 30-3-115 of Idaho Code.~~

Transfer of Student Records

~~In the event of dissolution of the school, all parents will be notified in writing. SMS will offer advice in the placing of students in alternate education settings. It will be the responsibility of the President of the Board to ensure that all student school records will be forwarded to the local school district or to the school where the student will be attending to ensure documents are stored/maintained indefinitely. Parents will be given instructions on how to request a transfer of student records to a specific school.~~

Disposal of Assets

~~Any items purchased with federal money will be turned over to the Authorizer for distribution. Any additional assets will be either distributed or sold to repay debts pursuant to Sections 30-3-114 and 30-3-115 of Idaho Code. Any remaining assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the Principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for public charitable or educational purposes.~~

Transfer of Personnel Records to the Employees

~~Personnel records will be mailed to employees at the address on file upon termination of the Charter.~~

August 15, 2013

SYRINGA MOUNTAIN SCHOOL

Cultivating the Head, Heart and Hands

A Petition to Establish a Public Charter School Beginning in August of the 2014 -2015 school year. Opening with Grades K–5 the first year and adding additional grades each subsequent year through 8th grade within or near the city of Hailey, Idaho

Available to all Idaho students with a primary attendance area consisting of Blaine County School District No. 61

APPENDICES

Submitted to Public Charter School Commission May 17, 2013

Revised and resubmitted July 16, 2013 and August 2, 2013

Contact: Dr. Mary Gervase,
208-720-6327,
Post Office Box 3531, Hailey,
Idaho 83333
marymgervase@yahoo.com

Syringa Mountain School does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs, including vocational programs, in accordance with Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Educational Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended. Any variance should be brought to the attention of the administration through personal contact, letter, phone, or mail.

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APPENDIX A Articles, Bylaws and Certificate of Assumed Business Name

A Certificate of Assumed Business Name has been filed. All documents will be officially changed to reflect the name Syringa Mountain School. The IRS approval of the 1023 Non-profit status for Syringa Mountain School is included.

2012 JUL 10 AM 8:51

SECRETARY OF STATE
STATE OF IDAHO

FILED EFFECTIVE

ARTICLES OF INCORPORATION
OF

Wood River Waldorf Methods School,
A Public Charter School, Inc.

Articles of Incorporation of the undersigned, all of whom are citizens of the United States, desiring to form a Non-Profit Corporation under the Non-Profit Corporation Law of Idaho, do hereby certify:

ARTICLE I

The name of the corporation shall be: Wood River Waldorf Methods School, A Public Charter School, Inc.

ARTICLE II

This corporation is organized exclusively for charitable, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code. Without limiting the powers the corporation may lawfully exercise, the corporation shall have the powers to receive, retain and expend funds from the governments of the United States of America, state and local governments, charitable or educational organizations (including foundations), private organizations, or individuals. The specific purpose for which this corporation is organized is the operation of a public charter school.

ARTICLE III

The street address of the registered office is 73 Pioneer View Drive, Hailey, Idaho 83333 and the registered agent at such address is: Dr. Mary Gervase

ARTICLE IV

The name(s) and address(es) of the current Directors are:

Name	Address
Dr. Mary Gervase	P.O. Box 300, Hailey, Idaho 83333 73 Pioneer View Drive, Hailey, Idaho 83333
Ben Rogers	118 Grace Drive, Hailey, ID 83333
Joy Higdon	517 N. First Ave, Hailey ID 83333

Wood River Waldorf Methods School Articles of Incorporation 1

THIRD SECRETARY OF STATE
07/10/2012 05:00
CR: 1860 CT: 278613 SR: 1321367
10 30.05 = 30.04 INC NECP # 2

0195313

ARTICLE V

The name and address of one incorporator: Dr. Mary Gervase, P.O. Box 3531, Hailey, Idaho 83333 or 73 Pioneer View Drive, Hailey, Idaho 83333

ARTICLE VI

The mailing address of the corporation shall be: P.O. Box 3531, Hailey, Idaho 83333

ARTICLE VII

The corporation does have voting members.

ARTICLE VIII

No part of the net earnings of the corporation shall inure to the benefit of its incorporator, officers, directors, members, or any other private persons, except that the corporation shall be authorized to make payments and distributions in furtherance of the purposes set forth herein in Article Nine and in the Bylaws. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, this corporation shall not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of the purposes of this corporation.

ARTICLE X

In the event of dissolution or cessation of all activities, all assets remaining after payment of any outstanding liabilities shall be given to the Idaho Public Charter School Commission. Any such assets not disposed of shall be disposed of by the Superior Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purpose. Additionally, all records of students attending Wood River Waldorf Methods School will immediately be transferred to the students' school district of residence.

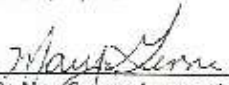
ARTICLE XI

The fiscal year of the corporation shall be July 1 through June 30.

ARTICLE XII

The duration of the corporation shall be perpetual.

Dated this 9th of July, 2012.


Dr. Mary Gervase, Incorporator
720-6327, 788-9729

Wood River Waldorf Methods School Articles of Incorporation - 2

ARTICLES OF INCORPORATION: BYLAWS

SMS, A Public Charter School, Inc. Doing Business As Syringa Mountain School.

Filed and approved by the Idaho Secretary of State 7/10/2012

Amended Articles will be filed upon approval by the Public Charter School Commission

ARTICLE I

OFFICES

Section 1.1 Offices

The Corporation's principal office shall be fixed and located in the County of Blaine, State of Idaho, as the Board of Directors shall determine. The Board is granted full power and authority to change the principle office from one location to another within the County of Blaine, State of Idaho.

ARTICLE 2

PURPOSE

Section 2.1 Purpose

The Corporation is organized exclusively for educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provisions of any future Federal income tax code.

Notwithstanding any other provision of these Bylaws to the contrary, the Corporation shall not carry on any activities not permitted of:

- (a) a corporation exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provisions of any future Federal income tax code; or
- (b) a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, or the corresponding provisions of any fixture Federal income tax code.

ARTICLE 3

NO SHAREHOLDERS/PARENT MEMBERS/MEMBERS

Section 3.1 No Shareholders

The Corporation shall have no shareholders. Any action which would otherwise by law require approval by a majority of all shareholders shall require only approval of the Board. All rights, which would otherwise by law vest in the shareholders, shall vest in the Board.

Section 3.2 Qualifying Parent/ Parent Members/Members Associates

Nothing in the Article 3 shall be construed to limit the Corporation's right to recognize a "Qualifying Parent" as a Parent Member or Member of the Corporation. Parent Members or Members of the corporation may originate or take part in the discussion of any subject that may properly come before any meeting of the board, but may not vote except for election of Directors. The Corporations right to recognize and refer to it's Parent Members or Members shall not render anyone a shareholder within the meaning of Idaho Code 30-334 of the Act.

~~fer to persons associated with it as "members" even though such persons are not members, and no such reference by the Corporation shall render anyone a member within the meaning of Section 30-3-34 of the Idaho Nonprofit Corporation Act found in the Idaho Code.~~

Section 3.3 Founders and Admission Preference

For purposes of these Bylaws, a "Founder" is hereby defined as a person, including employees, parents, or staff of a public charter school, who has served for at least 9 months on the founders board or committees and has worked at least 100 hours on outside projects. The time on the founders board or committees and the hours on outside projects must be performed by the date of the first lottery. The Board of Directors of SMS will vote prior to the first lottery to identify qualified founders based on the criteria above.

3.4 For purposes of these Bylaws, a "Qualifying Parent" or Parent Member or Member is defined as a parent having a child or children enrolled in any charter school operated by the Corporation. As used herein, the term "parent" includes a person standing in parental relation to a child enrolled in the charter school, including a birth or adoptive parent, a foster parent, a legal guardian, or an adult family member a. who is caring for an enrolled child, b. with whom the child lives, and c. who is legally responsible for the child. The term does not include a person whose parent child relationship has been lawfully terminated or a person not entitled to possession of or access to a child under a court order.

ARTICLE 4

BOARD OF DIRECTORS

Section 4.1 Board of Directors

The Board shall consist of Directors elected or appointed for a three (3) year term of office as set forth below. The number of Directors constituting the Board of the Corporation shall be not less than five (5) or more than nine (9) Directors. The function of the Board can be described as fiscal management, policy making, advising and evaluating. The Board shall have the further duty of directing the financial means by which the educational program is conducted. They shall also ensure that the community be informed of the needs, purposes, values and status of the charter school.

Initial terms: Directors appointed or elected in the first year of incorporation will serve terms as follows:

<u>Dr. Mary Gervase</u>	<u>1 year</u>
<u>Travis Scott</u>	<u>1 year (parent)</u>
<u>Joy Higdon Spencer</u>	<u>1 year</u>
<u>Phoebe Pilaro</u>	<u>2 years (parent)</u>
<u>Don Keller</u>	<u>2 years</u>
<u>Greg Bloomfield</u>	<u>3 years (parent)</u>
<u>Ben Rogers</u>	<u>3 years (parent)</u>

Section 4.2 Powers of the Board of Directors

The Board, as a board, shall have the full power and duty to manage and oversee the operation of the Corporation's business and to pledge the credit, assets and property of said Corporation when necessary to facilitate the efficient operation thereof. Authority is given to the Charter School Board of Directors by the State of Idaho as provided in the 'Public Charter Schools Act of 1998.' (I.C. § 33-5201 et. seq.).

Section 4.3 Election of Directors

(a) During the initial year of operation, the Board shall be comprised of the Directors listed in the Articles of Incorporation and any other Directors elected by the then-current Board or appointed in accordance with these bylaws.

(b) No more than four (4) ~~three (3)~~ Directors may be a parent with one or more children attending the Public Charter School.

(c) After the initial year of operation, ~~unless the Board deems it necessary to extend the election for an additional year,~~ Directors will be elected to fill vacancies on the Board by vote of Members of the Corporation at the Corporation's annual meeting.

(d) Voter Qualification: Except as provided herein, each Member may cast a vote for each Director elected at the annual meeting. In order to be qualified to vote, the Member must have at least one child enrolled at SMS as of the date of the Special meeting. If two or more members qualify as "parent" of an enrolled child, such Members shall be collectively entitled to cast one vote for each Director at the Special Meeting. Members with more than one child enrolled in SMS may only cast one vote for each Director regardless of the number of children they have enrolled. Prior to the casting of the votes, the President or Secretary of the Corporation shall verify the identity of the Members eligible to vote by requiring proof of identification in the form of a driver's license or other form of identification deemed satisfactory by the President or Secretary.

(e) Proxy: Members may vote either in person or by a proxy signed by such member and personally delivered to the President or Secretary prior to the start of the meeting. Such proxy shall be invalid if executed more than 300 days prior to the date of the meeting. Such proxy will be invalid if issued by a Member who is subject to a collective voting right shared with at least one other Member and one of the Members subject to the collective voting right attends the meeting and votes in person.

(f) Tabulation of votes: Voting shall be by secret ballot and shall be supervised by the President or Secretary of the Corporation. At the conclusion of the balloting, the President or Secretary of the Corporation shall count the votes prior to the adjournment of the meeting. At least 10% of the total number of qualifying votes must be cast at the Special Meeting in order to ratify an election of Directors. If less than 10% of the total number of qualifying votes is cast at the Special Meeting, the results shall be discarded and the Special Meeting shall be re-noticed as specified in Section 5.3 for a date not less than three (3) and not more than fourteen (14) days after the date of the Special Meeting at which an insufficient number of votes were cast.

(g) Ratification number: An affirmative vote of the majority of votes cast for each Director at the Special Meeting is sufficient to ratify the election of the Director. In the event that any candidate for ratification shall not receive the affirmative vote of majority of votes cast at the meeting for that candidate, such candidate's election shall not have been ratified. In such event, the President or Secretary of the Corporation shall communicate the results of the vote to the Board, and the Board shall, within ten (10) days thereafter, elect another candidate to serve as a Director of the Corporation. The election of such replacement candidate shall then be similarly subject to ratification in the same manner set forth above. In the event such replacement candidate fails to obtain ratification, the Board shall appoint yet another replacement candidate, whose election shall be deemed to be final, without further ratification vote.

Section 4.4 Term

- (a) Directors shall be elected or appointed to three (3) year terms of office except for the first year of incorporation, where seats will be staggered as listed above in 4.1.
- (b) Each Director shall serve until the Members, at the annual meeting of the Corporation, duly elects his/her successor.

Section 4.5 Resignation and Removal

Subject to the provisions of Section 30-3-69 of the Idaho Nonprofit Public Corporation Act, any Director may resign effective upon giving written notice to the Chairman of the Board, or the Secretary of the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be selected before such time, to take office when the resignation becomes effective. A Director may be removed without cause by a majority of the Directors then in office.

Section 4.6 Vacancies

- (a) A Board vacancy or vacancies shall be deemed to exist if any Director dies, resigns, or is removed, or if the authorized number of Directors is increased.
- (b) The Board may declare vacant the office of any Director who has been convicted of a felony, or has been found to have breached any duty arising under Section 30-3-85 of the Idaho Nonprofit Public Corporation Act or to be of unsound mind, by any court of competent jurisdiction, or has failed to attend four (4) or more meetings of the Board in any calendar year.
- (c) Removal of a Director for one or more of the reasons listed in Section 4.6(b) above may be initiated by any member of the Board or by a majority vote petition of the Stakeholders. The Board shall hold a public meeting within ten (10) school attendance days of receiving such a request or petition. Such meeting shall be conducted with regard for the reasonable due process rights of all parties and in public, except where either the Board or the Director whose removal is sought requests a closed session. Where a closed session is held, the final action of the Board shall be taken in public.
- (d) A vacancy on the Board may be filled by a majority vote of the remaining Directors, although less than a quorum. Each Director so elected shall hold office until the next annual meeting of the Corporation.
- (e) No reduction of the authorized number of Directors shall have the effect of removing any Director prior to the expiration of the Director's term of office.

Section 4.7 Oath of Directors

An oath of office shall be administered to each Director, whether elected, re-elected or appointed. The oath may be administered by the Secretary or by a Director of the charter school. The records of the charter school shall show such oath of office to have been taken, by whom the oath was administered and shall be filed with the official records of the charter school. The Director is required to take his/her oath within ten (10) days after the Director has notice of his/her election or appointment, or within fifteen (15) days from the commencement of his/her term of office, whichever comes first. Before any Director elected or appointed enters upon the duties of his/her office, he/she must take the following oath:

I do solemnly swear (or affirm, if re-elected) that I will support the Constitution of the United States, and the Constitution of the State of Idaho, and that I will faithfully discharge the duties of Director of the SMS Public Charter School according to the best of my ability.

Section 4.8 Charter Board Code of Ethics

Upon election/appointment, or within fifteen (15) days from the commencement of his/her term of office, whichever comes first, the Director will sign the Charter Board Code of Ethics. A file of signed Code of Ethics will be kept in the office of the Board Secretary or his/her designee.

Section 4.9 Compensation

Directors shall not receive any compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the Corporation's business. The Corporation shall carry liability insurance covering the Corporation's business in an amount to be established by the Board.

Section 4.10 Employees

The Board shall have the power to hire employees of the Corporation either on an at-will basis or via a written contract whose duties shall be specified by the Board.

Section 4.9 Voting

Voting by the Board shall be in person or by proxy vote. Tie votes will be broken by the Chairman of the Board.

Section 4.10 Quorum

No business shall be transacted at any meeting of the Board unless a quorum of the members is present. A majority of the full membership of the Board shall constitute a quorum. A majority of the quorum may pass a resolution.

Section 4.11 Rights of Inspection

Every Director has the right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the Corporation provided such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the Corporation's obligations to maintain the confidentiality of certain books, records and documents under any applicable federal, state or local law.

Section 4.12 Committees

The Board may create one (1) or more committees of the Board and appoint members of the Board to serve on them. Each committee shall have one (1) or more Board members on it, who serve at the pleasure of the Board. The creation of a committee and appointment of members to it shall be by a majority vote of the Board members then in office. Once the task has been accomplished for which the committee was formed it shall be dissolved. A committee of the Board may not 1) authorize distributions; 2) pledge or transfer assets; 3) elect, appoint or remove directors; and 4) adopt, amend or repeal the articles of incorporation or bylaws. Each committee may keep minutes of its proceedings and shall report periodically to the Board. Committees shall report to the full Board regularly at Board meetings and any recommendations from committees shall be reviewed by the Board, discussed and voted on as needed.

Section 4.13 Validity of Instruments

Any note, mortgage, evidence of indebtedness, contract, deed, conveyance or other written instrument and any assignment or endorsement thereof executed or entered into between the corporation and any other person, shall be valid and binding on the corporation when signed by the Chairman of the corporation. Any such instruments may be signed by any other Director(s) and in such manner and from time to time shall be determined by the Board and, unless so authorized by the Board, no officer, agent or employee shall have any power or authority to bind the corporation by any contract or engagement, to pledge its credit, or to render it liable for any purpose or amount.

ARTICLE 5

BOARD MEETINGS

Section 5.1 Place of Meeting

The place of all meetings of the Directors shall be the principal office of the Corporation in the County of Blaine, Idaho, or at such other place as shall be determined from time to time by the Board; and the place at which such meetings shall be held shall be stated in the notice and call of meeting. No change in the place of meeting shall be made within three (3) days before the day on which an election of Directors is to be held.

Section 5.2 Annual Meeting

The annual meeting of the Directors of the Corporation for the election of Directors and Officers to succeed those whose terms expire and for the transaction of other business as may properly come before the meeting, shall be held each year on the second ~~Monday~~ Tuesday of August, if not a legal holiday, and if a legal holiday, then on the day following, at 7:00 o'clock p.m. If the annual meeting of the Directors be not held as herein prescribed, the election of Directors and Officers may be held at any meeting called thereafter pursuant to these Bylaws.

Section 5.3 Regular Meetings

Regular meetings of the Directors of the Corporation will be scheduled for the second Tuesday of each month.

Section 5.4 Special Meetings

Special meetings may be called by the Chairman or by any two (2) Directors of the Board and held at any time.

Section 5.5 Meetings Open to the Public

Except as provided herein, all meetings shall be open to the public and all persons shall be permitted to attend any meeting.

Section 5.6 Telecommunications Devices at Meetings

All meetings may be conducted using telecommunications devices which enable all Directors of the Corporation participating in the meeting to communicate with each other. Such devices may include, but are not limited to, telephone or video conferencing devices or other similar communications equipment. Participation of Directors through telecommunications devices shall constitute presence in person by such Director at the meeting; provided, however, that at least one (1) member of the Directors of the Corporation or the chief administrative officer of the Corporation shall be physically present at the location designated in the meeting notice to ensure that the public may attend such meeting in person and that the communications among Directors of the Corporation are audible to the public attending the meeting in person and other the Directors of the Corporation.

Section 5.6 Meeting Agendas

A forty-eight (48) hour agenda notice shall be required in advance of each regular meeting; however, additional agenda items may be added up to and including the hour of the meeting, provided that a good faith effort was made to include in the notice all agenda items known at the time to be probable items of discussion. The agenda for any Board meeting shall be prepared by the Board's

Secretary or under direction from the Board Secretary. Items submitted by the Board Chair or at least two (2) board members shall be placed on the agenda along with committee reports, and all other corporate business. Anyone associated with the Syringa Mountain School may also suggest inclusions on the agenda. Such suggestions must be received by the Board Secretary at least four (4) days before the Board meeting, unless of immediate importance. Individuals who wish to be placed on the Board meeting agenda must also notify the Board Secretary, in writing, of the request. The request must include the reason for the appearance. A twenty-four (24) hour meeting agenda shall be required in advance of a special meeting unless an emergency exists. An emergency is defined as any situation involving injury or damage to persons or property, or immediate financial loss, or the likelihood of such injury, damage or loss. The notice requirements for a special meeting shall be suspended if such notice is impracticable, or would increase the likelihood or severity of such injury, damage or loss. In the event that a special meeting is held based upon emergency purposes, the reason for the emergency must be stated at the outset of the meeting.

Section 5.7 Notice of Meeting

Notice of the time and place of the annual meeting of the Directors or of any monthly meetings of the Directors shall be by written or printed notice of the same posted at the Charter School. The Board Secretary may email or physically deliver the agenda and meeting notice to Board members. No special meeting shall be held without at least a twenty-four (24) hour meeting notice unless an emergency exists. The notice for a special meeting shall include at a minimum the meeting date, time, place and name of the Charter School calling for the meeting.

Section 5.8 Meeting Minutes

The Directors of the Corporation shall provide for the taking of written minutes of all its meetings. However, neither a full transcript nor a recording of the meeting shall be required. All minutes shall be available to the public within a reasonable time after the meeting on the school website, and shall include at least the following information: (a) All members of the Directors of the Corporation present; (b) All motions, resolutions, orders, or ordinances proposed and their disposition; (c) The results of all votes, and upon the request of a member, the vote of each member, by name.

Minutes of any executive sessions held by the Directors of the Corporation under Title 67, Chapter 23 of the Idaho Code may be limited to material, the disclosure of which is not inconsistent with the provisions of section 67-2345, Idaho Code, but must contain sufficient detail to convey the general tenor of the meeting.

Unofficial minutes shall be delivered to Directors in advance of the next regularly scheduled meeting of the Board with the agenda for the next Board meeting. Minutes need not be read publicly, provided that Directors have had an opportunity to review them before adoption. A file of permanent minutes of Board meetings shall be maintained in the office of the Board Secretary or his/her designate, to be made available within a reasonable period of time after a meeting for inspection upon written request.

Section 5.9 Executive Sessions

“Executive session” means any meeting or part of a meeting which is closed to any persons for deliberation on certain matters. An executive session may be held by the Directors of the Corporation for any of the reasons specified in Title 67, Chapter 23 of the Idaho Code. In order to convene into a duly authorized executive session all of the following must occur: 1) the Chairman, acting Chairman or Vice Chairman of the Board of the Corporation must move for holding of an executive session; 2) two-thirds (2/3) of the Directors of the Corporation present must vote in favor of holding of such executive session; and 3) said vote must be recorded in the minutes of the meeting showing the individual vote of each Director present. No executive session may be held for the purpose of taking any final action or making any final decision. Unless otherwise allowed by law, no Director of the Corporation may disclose the content of an executive session to an outside source.

Section 5.9 Consent Agenda

To expedite business at a Board meeting, the Board approves the use of a consent agenda, which includes those items considered to be routine in nature. Any item which appears on the consent agenda may be removed by any Director. Any Director who wishes to remove an item from the consent agenda shall give advance notice in a timely manner to the Secretary of the Board. The remaining items will be voted on by a single motion. The approved motion will be recorded in the minutes, including a listing of all items appearing on the consent agenda.

Section 5.10 Meeting Conduct and Order of Business

General rules of parliamentary procedure are used for every Board meeting. Robert’s Rules of Order may be used as a guide at any meeting. The order of business shall be reflected on the agenda. Voting shall be by acclamation or show of hands.

Section 5.11 Other Provisions of the Open Meeting Law

Pursuant to Title 33, Chapter 52 of the Idaho Code, all other provision of Title 67, Chapter 23 of the Idaho Code shall be applicable to meetings called by the Directors of the Corporation in the same manner that a traditional school and the boards of school trustees are subject to those provisions.

ARTICLE 6

OFFICERS AND DUTIES

Section 6.1 Officers

The Officers of the Corporation shall be Chair of the Board, Vice Chairman, Secretary, and Treasurer. Any number of offices may be held by the same person, except that neither the Secretary nor the Treasurer may serve concurrently as the Chairman of the Board. Officers of the Corporation shall also be Directors of the Corporation. The Officers shall be elected each year at the annual meeting by the Board and serve at the pleasure of the Board for a term of one (1) year when their respective successor shall be elected. Individual Officers of the Corporation, have no authority over school affairs, except as provided by law or as authorized by the Board.

Section 6.2 Chairman of the Board

The Chairman of the Board is the general manager and chief executive officer of the Corporation and has, subject to the control of the Board, general supervision, direction and control of the business of the Corporation. The Chairman of the Board shall preside at all meetings of the Board. The Chairman of the Board has the general management powers and duties usually vested in the office of President and General Manager of a corporation as well as such other powers and duties as may be prescribed from time to time by the Board. The Chairman of the Board shall sign all papers and documents as required by law and as authorized by action of the Board.

Section 6.3 Vice Chairman

In the absence or disability of the Chairman of the Board, the Vice Chairman will perform all the duties of the Chairman of the Board and, when so acting, shall have all the powers of, and be subject to all the restrictions upon, the Chairman of the Board. The Vice Chairman shall have such other powers and perform such other duties as the Board may prescribe from time to time.

Section 6.4 Secretary

(a) The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, including the following information about all such meetings: the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of those present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, at the principal office in the State of Idaho the original or a copy of the Corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all Directors and their respective addresses.

(b) The Secretary shall give, or cause to be given, notice of all meetings of the Board and any committees thereof required by these Bylaws or by law to be given, and shall distribute the minutes of meetings of the Board to all its members promptly after the meetings; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the Treasurer; and shall have such other powers and perform such duties as may be prescribed from time to time by the Board.

Section 6.5 Treasurer

(a) The Treasurer of the Corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and transactions of the Corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Board member.

(b) The Treasurer shall deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the Corporation with such depositories as may be designated from time to time by the Board. The Treasurer shall disburse the funds of the Corporation as may be ordered by the Board, and shall render to the Board, upon request, an account of all transactions as Treasurer and of the financial condition of the Corporation. The Treasurer shall present an operating statement and report, since the last preceding regular Board meeting, to the Board at all regular meetings. The Treasurer shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.

Section 6.6 Removal

Any Officer may be removed, for cause, by a majority of the Directors then in office.

Section 6.7 Vacancies

A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular election or appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

ARTICLE 7

CHARTER SCHOOL POLICY

Section 7.1 Adoption and Amendment of Policies

The adoption of new policies and the revision and amending of existing policies shall be the sole responsibility of the Board of Directors. All policies shall conform to local, state, and federal laws as well as to the rules and regulations of the Idaho Department of Education. Proposed new policies and proposed changes in existing policies shall be presented in writing for reading and

discussion at a regular or special Board meeting. Such proposals may be referred to the Superintendent or Chief Administrative Officer for detailed study as needed prior to Board action on the proposal. The Board encourages the Superintendent or Chief Administrative Officer to contact other experts to have potential Board policy researched. Interested parties, including any Board member, citizen, or employee of the Board may submit views, present data or arguments, orally or in writing, in support of or in opposition to proposed policy. Any written statement by a person relative to a proposed policy or amendment should be directed to the Board Secretary prior to the second reading.

Proposed new policies and proposed changes in existing policies shall undergo a minimum of two (2) readings in the following manner:

1. At a regular or special Board meeting the proposed new or amended policy shall be presented in writing for reading and discussion.
2. The final vote for adoption shall take place not earlier than at the second reading of the particular policy. Although approval of a new or amended policy requires a minimum of two (2) readings, temporary approval may be granted by the Board in lieu of formal policy to meet emergency conditions or special events which will take place before formal action can be taken.

All new or amended policies shall become effective upon adoption, unless a specific effective date is provided in the motion for adoption. Policies as adopted or amended shall be made a part of the minutes of the meeting at which action was taken, and shall also be included in the Charter School's policy manual. Policies of the Charter School shall be reviewed annually by the Board.

Section 7.2 Administration in Absence of Policy

In cases where action must be taken before the next Board meeting and where the Board has provided no policies or guides for administrative actions, the Superintendent or Chief Administrative Officer shall have to power to act. His/her decisions, however, shall be subject to review by action of the Board at its next regular meeting. In addition, it shall be the duty of the Superintendent or Chief Administrative Officer to inform the Board of such action and the need for policy.

Section 7.3 Suspension of Policies

Under circumstances which require a waiver of a policy, the policy may be suspended by a majority vote of the members present. In order to suspend a policy, all Directors must have received written notice of the meeting which included a proposal to suspend the policies with an explanation of the purpose of such proposed suspension. If such a proposal is not made in writing in advance of the meeting, the policies may only be suspended by a unanimous vote of all Directors present.

Section 7.4 Policy Manuals

The Superintendent or Chief Administrative Officer shall develop and maintain a current policy manual which contains the policies of the Charter School. Each administrator, as well as staff, students and other residents, shall have ready access to the manual. All policy manuals distributed to anyone shall remain the property of the Charter School and shall be subject to recall or revision at any time.

Section 7.5 Administrative Procedures

The Superintendent or Chief Administrative Officer shall develop such administrative procedures as are necessary to ensure consistent implementation of policies adopted by the Board. When a written procedure is developed, the Superintendent or Chief Administrative Officer shall submit it to the Board as an information item. Such procedures need not be approved by the Board, though they may be revised when it appears that they are not consistent with the Board's intentions as expressed in its policies. On controversial topics, the Superintendent or Chief Administrative Officer may request prior Board approval.

ARTICLE 8

PUBLIC RECORDS REQUESTS

Section 8.1 Records Available to Public

Every person has the right to examine and take a copy of any Charter School record at all reasonable times. All Charter School records except those restricted by state and federal law shall be available to citizens for inspection at the office of the Superintendent or Chief Administrative Officer or at a place designated by the Superintendent or Chief Administrative Officer.

Section 8.2 Written Records Request Required

All persons or entities requesting records must make a written request which includes the person or entity's name, mailing address and telephone number.

Section 8.3 Copying Fee Schedule

The copying fee schedule of the Charter School is as follows:

- a) Copies of public records —10¢ per page and any media such as CDs, DVDs or over-sized items at cost;
- b) In addition to the costs set forth above, the Charter School will charge for the actual labor costs associated with locating and copying documents if:
 - (1) The request is for more than 100 pages of records;

August 15, 2013

(2) The request includes non-public information that must be redacted from the public records; and/or (3) The labor associated with locating and copying the records exceeds two (2) hours.

The advance payment of the cost of copying and the actual labor costs associated with locating and copying documents if the request meets the criteria above is required. However, the Charter School shall not charge any cost or fee for copies or labor when the requester demonstrates either: (i) the inability to pay; or (ii) that the public's interest or the public's understanding of the operations or activities of government or its records would suffer by the assessment or collection of any fee.

Section 8.3 Response to Request for Examination of Public Records

The Charter School shall either grant or deny a person's written request to examine or copy public records within three (3) working days of the date of the receipt of a request for public records. If a longer period of time is needed to locate or retrieve the records, the Charter School shall notify the person requesting the records of the same and provide the records to such person not later than ten (10) working days following the request. If the Charter School fails to respond within ten (10) working days after the requested is submitted, the request shall be deemed to be denied.

If the Charter School denies a person or entity's request to examine or copy records or denies in part and grants in part the request to examine and/or copy the records, the person legally responsible for administering the Charter School shall notify the person or entity in writing of the denial or partial denial of the request for the public record. In addition, the notice of denial or partial denial shall state that the attorney for the Charter School has reviewed the request or shall state that the Charter School has had an opportunity to consult with an attorney regarding the request for examination or copying of a record and has chosen not to do so. The notice of denial or partial denial shall also indicate the statutory authority for the denial and clearly indicate the right to appeal the denial or partial denial and the time periods for doing so.

Section 8.4 Other Provisions of the Public Writings Law

Pursuant to Title 33 Chapter 52 of the Idaho Code, all other provision of Title 9, Chapter 3 of the Idaho Code shall be applicable to a request for public records in the same manner that a traditional school and the boards of school trustees are subject to those provisions.

ARTICLE 9

CONFLICTS OF INTEREST

Section 9.1 Direct or Indirect Pecuniary Interests

No Director shall have a pecuniary interest directly or indirectly in any contract or other transaction pertaining to the maintenance or conduct of the authorized chartering entity or charter school.

Section 9.2 Contracts Involving a Person Related to a Director within the Second Degree

The Board of Directors may accept and award contracts involving the public charter school to businesses in which the Director or a person related to him by blood or marriage within the second degree has a direct or indirect interest, provided that the procedures set out in Idaho Code §§ 18-1361 or 18-1361A are determined by legal counsel for the Board to be not applicable or followed.

Section 9.3 Contracts Involving the Spouse of a Director

Unless it is determined by legal counsel for the Board to be proper and except as provided in Idaho Code §§ 18-1361 or 18-1361A, the Board of Directors of any public charter school shall not enter into or execute any contract with the spouse of any member of such Board, the terms of which said contract require, or will require, the payment or delivery of any public charter school funds, moneys or property to such spouse. Any opinion from the Board's legal counsel shall be in writing.

Section 9.3 Consideration of Employment Involving a Person Related to a Director or a Director's Spouse within the Second Degree

When any relative of any Director or relative of the spouse of a Director related by affinity or consanguinity within the second degree is to be considered for employment in a public charter school, such Director shall abstain from voting in the election of such relative, and shall be absent from the meeting while such employment is being considered and determined.

ARTICLE 10

FISCAL AFFAIRS

Section 10.1 Fiscal Year

The fiscal year of the Corporation shall be from July 1st to June 30th.

ARTICLE 11

NOTICES

Section 11.1 Manner of Giving Notice

August 15, 2013

Whenever provisions of any statute or these Bylaws require notice to be given to any Director, Officer or other individual, they shall not be construed to mean personal notice. Such notice shall be given in writing and placed on the bulletin board of the Corporation in sufficient amount of time prior to the meeting or action to be taken as required by statute, the Articles of Incorporation or these Bylaws; said notice need not be given individually and may be given in one notice document.

Section 11.2 Waiver

A waiver of any notice in writing, signed by a Director or Officer, whether before or after the time stated in said waiver for holding a meeting, or presence at any such meeting, shall be deemed equivalent to a notice required to be given to any Director, or individual.

ARTICLE 12

DISSOLUTION

Section 12.1 Dissolution

Upon dissolution of the Corporation, assets shall be distributed to creditors pursuant to Sections 30-3-114 and 30-3-115 of the Idaho Code. After paying or adequately providing for the debts and obligations of the Corporation, the remaining assets upon corporation, Idaho Nonprofit Corporation Act 30-3-113 (f)(ii) states its assets may be transferred to those persons whom the corporation holds itself out as benefiting or servicing. The asset would be held in public trust until it could be put to same or similar charitable use, by a nonprofit corporation which is organized and operated exclusively for educational purposes and which has established their tax exempt status under Section 501(c)(3) of the Internal Revenue Code of 1986, or to a state or local government for public purpose as determined by the Board.

ARTICLE 13

AMENDMENTS

Section 13.1 Bylaws

New Bylaws may be adopted or these Bylaws may be amended or repealed by a majority vote of the Board. Whenever any amendment or new Bylaws are adopted, copies shall be placed in the Book of Bylaws with the original Bylaws, and immediately after them and shall not take effect until approved by the Authorizer. If any Bylaws are repealed, the fact of repeal with the date of the meeting at which the repeal was enacted must be stated in the book and until so stated, the repeal must not take effect. Whenever any provision of the Bylaws is either amended or repealed, a marginal note shall be made thereon indicating the place or page where the amendment or repeal may be found.

CERTIFICATE OF BYLAWS

I certify that I am the initial agent of Syringa Mountain School, Inc., an Idaho Nonprofit Corporation, and that the foregoing Bylaws, constitute the Bylaws of such corporation.

IN WITNESS WHEREOF, I have signed my name to this Certificate on

WOOD RIVER WALDORF METHODIST SCHOOL

**ARTICLE 13
AMENDMENTS**

Section 13.1 Bylaws

New Bylaws may be adopted or these Bylaws may be amended or repealed by a majority vote of the Board. Whenever any amendment or new Bylaws are adopted, copies shall be placed in the Book of Bylaws with the original Bylaws, and immediately after them and shall not take effect until copied. If any Bylaws are repealed, the fact of repeal with the date of the meeting at which the repeal was enacted must be stated in the book and until so stated, the repeal must not take effect. Whenever any provision of the Bylaws is either amended or repealed, a marginal note shall be made therein indicating the place or page where the amendment or repeal may be found.

CERTIFICATE OF BYLAWS

I certify that I am the initial agent of Wood River Waldorf Methodist School, Inc., an Idaho Nonprofit Corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation.

IN WITNESS WHEREOF, I have signed my name to this Certificate on
Mary Deane 8/30/12 (date)



WOOD RIVER WALDORF METHODIST SCHOOL | Cultivating the Head, Heart and Hand

August 15, 2013



Code of Ethics for School Board Members

As a member of my local boards, I will strive to improve student achievement in public education, and to that end I will:

Attend all regularly scheduled board meetings insofar as possible, having read my packet ensuring that I am informed about the issues to be considered at the meetings;

Recognize that the board must comply with the Open Meeting Law and only has authority to make decisions at official board meetings;

Make all decisions based on the available facts and my independent judgment, and refuse to surrender that judgment to individuals or special interest groups;

Understand that the board makes decisions as a team. Individual board members may not commit the board to any action unless so authorized by official board action;

Recognize that decisions are made by a majority vote and the outcome should be supported by all board members;

Acknowledge that policy decisions are a primary function of the board and should be made after full discussion at publicly held board meetings, recognizing that authority to administer policy rests with the administrator;

Be open, fair and honest – no hidden agendas, and respect the right of other board members to have opinions and ideas which differ from mine;

Recognize that the administrator is the board's advisor and should be present at all meetings;

Understand the chain of command and refer problems or complaints to the proper administrative office while refraining from communications that may create conditions of bias should a district concern ever rise to the attention of the board as a hearings panel;

Keep abreast of important developments in educational trends, research and practices by individual study and through participation in programs providing such information;

Respect the right of the public to be informed about district decisions and school operations;

Understand that I will receive information that is confidential and cannot be shared;

Give staff the respect and consideration due skilled, professional employees and support the employment of those best qualified to serve as district staff, while insisting on regular and impartial evaluation of all staff;

Present personal criticism of district operations to the administrator, not to district staff or to a board meeting;

Refuse to use my board position for personal or family gain or prestige. I will announce any conflicts of interest before board action is taken; and

Remember always that my first and greatest concern must be the educational welfare of the students attending the public schools.

Signature: _____ Date: _____

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CERTIFICATE OF ASSUMED BUSINESS NAME

Pursuant to Section 53-504, Idaho Code, the undersigned
submits for filing a certificate of Assumed Business Name.

Please type or print legibly.

Instructions are included on back of application.

FILED EFFECTIVE

2013 JUL -3 AM 10:30

SECRETARY OF STATE
STATE OF IDAHO

1. The assumed business name which the undersigned use(s) in the transaction of business is:

Syringa Mountain School

2. The true name(s) and business address(es) of the entity or individual(s) doing business under the assumed business name:

Name

Complete Address

Wood River Waldorf Methods School,

PO Box 3531, Hailey, Idaho 83333

a public charter school, Inc.

(C195313)

3. The general type of business transacted under the assumed business name is:

- | | |
|--|--|
| <input type="checkbox"/> Retail Trade | <input type="checkbox"/> Transportation and Public Utilities |
| <input type="checkbox"/> Wholesale Trade | <input type="checkbox"/> Construction |
| <input checked="" type="checkbox"/> Services | <input type="checkbox"/> Agriculture |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Finance, Insurance, and Real Estate | |

Submit Certificate of
Assumed Business
Name and \$25.00 fee to:

Secretary of State
450 North 4th Street
PO Box 83720
Boise ID 83720-0080
208 334-2301

4. The name and address to which future correspondence should be addressed:

Dr. Mary Gervase

PO Box 3531

Hailey, Idaho 83333

5. Name and address for this acknowledgment copy is (if other than # 4 above):

Signature: *Mary Gervase*

Printed Name: Dr. Mary Gervase

Capacity/Title: Incorporator

Signature: _____

Printed Name: _____

Capacity/Title: _____

Secretary of State use only

IDAHO SECRETARY OF STATE
07/03/2013 05:00
CK: 1464287 CT: 172099 BH: 1380769
1 @ 25.00 = 25.00 ASSUM NAME # 2

9/21/2012

sbn.pmd Rev. 07/2010

August 15, 2013



TAX EXEMPT AND
GOVERNMENT ENTITIES
DIVISION

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

Date: JUL 17 2013

Wood River Waldorf Methods School, A Public Charter
School, Inc.
Post Office Box 3531
Hailey, ID 83333

Employer Identification Number:
35-2450616
Person to Contact and ID Number:
Maria Di Miceli, 2862951
Contact Number:
(202) 283-8927

Accounting Period Ending:
6
Public Charity Status:
509(a)(1) & 170(b)(1)(A)(ii)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
July 10, 2012
Contribution Deductibility:
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. **Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.**

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed *Compliance Guide for 501(c)(3) Public Charities* for some helpful information about your responsibilities as an exempt organization.

Sincerely,

Ronald J. Shoemaker
for Karen Schiller
Acting Director,
EO Rulings and Agreements

Enclosure: Pub. 4221-PC, *Compliance Guide for 501(c)(3) Public Charities*

APPENDIX B

Elector Signatures

August 15, 2013

JOLYNN DRAGE
CLERK OF THE DISTRICT COURT, EX-OFFICIO AUDITOR
AND RECORDER, BLAINE COUNTY
201 FIRST AVENUE SOUTH, SUITE 200
HAILEY, IDAHO 83333
TELEPHONE: (208) 788-5505 · FACSIMILE: (208) 788-5501
E-mail address: jdrage@co.blaine.id.us

December 31, 2012

STATE OF IDAHO)
) §
County of Blaine)

To the clerk of the Wood River Waldorf Methods School in Blaine County, State of Idaho; I, JoLynn Drage, County Clerk for Blaine County, hereby certify that 44 signatures on this Petition are those of qualified electors.

Signed: _____

JoLynn Drage
County Clerk or Deputy



Petition to Establish a New Idaho Public Charter School

This document is an **Elector Petition** and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT			
<ul style="list-style-type: none"> I am currently a qualified elector in the above-named school district. I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School. 					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
1. Hallie Kelly Staley	[Signature]	107 Amber St	Bellevue	720-1357	10/6/12
2. Selim Staley	[Signature]	107 Amber St	Bellevue	720-2371	10/6/12
3. Suea Grover	[Signature]	911 Eastridge Dr.	Hailey ID	720-8817	10/6/12
4. Anne Kallik	[Signature]	115 Hard Rock Lane SW	Hailey	622-3579	10/6/12
no sig 5. Sandra Willman	[Signature]	115 Victor Drive	Hailey	788-3226	
6. Alison Higon	[Signature]	1051 Creeks of the Hills Dr	Hailey	720-6137	10/11/12
7. Kerry Benner	[Signature]	604 Oak St.	Bellevue	721-7535	10/10/12
8. Albert Kanan	[Signature]	604 Oak St.	Bellevue	721-7514	10/10/12
not reg 9. Rebecca Dahl	[Signature]	2251 Moonlight Drive	Hailey	358-5446	10/10/12
10. Heather Mcgregor	[Signature]	230 N. 3rd Ave	Hailey	928-6058	10/10/12
11. Terri Rogers	[Signature]	118 Grace Drive	Hailey	720-1441	10/10/12
12. Paige Leaman	[Signature]	210 Cottonwood St.	Hailey	450-9157	10/10/12
13. SRIMUKH McGREW	[Signature]	1311 Queen of the Hills Dr	Hailey	309-3406	11/10/12
14. VAYARD BROKAS	[Signature]	109 Pioneer Pl.	Hailey	208-928-6424	12/2/12
15. Michael J. Staley	[Signature]	63 Pioneer View Drive	Hailey	208-578-2117	12/27/12

4/16/2008

Petition to Establish a New Idaho Public Charter School

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School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT			
<ul style="list-style-type: none"> I am currently a qualified elector in the above-named school district. I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School. 					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
16 Carrie Mahoney	[Signature]	613 N. 3rd St	Bellevue	788-4284	10/10/12
17 Brooke Park McKenna	[Signature]	21 Silverstone	Hailey	780-8848	10/10/12
18 Amy Jonas	[Signature]	1231 Wolfstone Dr.	Hailey	481-0265	10/10/12
19 John Benson	[Signature]	1231 Wolfstone Dr.	Hailey	575-4201	10/10/12
20 Johnny Hood	[Signature]	518 N. 3rd St	Bellevue	721-8655	10/10/12
21 Mike Schlatter	[Signature]	311 OAK ST	Bellevue	721-1561	10/10/12
22 Tim T Reynolds	[Signature]	421 S. River St.	Hailey	788-3325	10/17/12
23 Erin Mingall	[Signature]	123 N. 2nd St.	Bellevue	721-8655	10/12/12
24 Mary Genese	[Signature]	73 Pioneer View Dr.	Hailey	788-9729	10/31/12
25 Lushia Gangrich	[Signature]	416 S 3rd	Bellevue	721-8120	10/31/12
26 Jessica Banks	[Signature]	341 Eureka Dr.	Hailey	721-8654	11/26/12
27 Kelly Ortega	[Signature]	330 Glendale Rd.	Prattville	215-5528	11/28/12
28 Diana Anderson	[Signature]	112 SANDY LAKE	Prattville	126-9501	11/30/12
29 KESKIE HARRIS	[Signature]	3051 BERRY CREEK	Hailey	788-7751	12/1/12
30 Molly Fox	[Signature]	515 E. Main St.	Hailey	721-8655	10/1/12

not reg
family address
family address
not reg

Petition to Establish a New Idaho Public Charter School

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Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT			
<ul style="list-style-type: none"> I am currently a qualified elector in the above-named school district. I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School. 					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
1. Gina Rice	<i>Gina Rice</i>	Box 2124 - WY 84002	Ketchikan	208-726-1848	12/1/12
2. Susan Fierman	<i>Susan Fierman</i>	293 Indian Creek Rd	Hailey	208-788-0907	12/1/12
3. John Fisher	<i>John Fisher</i>	PO Box 510	Hailey	208-788-3212	12/1/12
4. Mary Jo Holm	<i>Mary Jo Holm</i>	PO 1135	Hailey	208-788-5584	12/1/12
5. Terry Fischer	<i>Terry Fischer</i>	Box 5016	Hailey	208-788-6663	12/1/12
6. Leslie Anderson	<i>Leslie Anderson</i>	355 Juniper	Hailey	788-4600	12/1/11
7. Benjamin Manning	<i>Benjamin Manning</i>	PO Box 4095	Hailey		12/1/11
8. Patricia Schmitt	<i>Patricia Schmitt</i>	124 Deer Valley Ln	Hailey	578-9763	12-1-12
9. Barbara S. Browning	<i>Barbara S. Browning</i>	172 Pine Rd.	Bellvue	721-8277	12-1-12
10. Mary Davis	<i>Mary Davis</i>	451 Peachridge Dr	Hailey	208-788-0803	12/1/12
11. Andrew Reid	<i>Andrew Reid</i>	1550 North Rd	Hailey	208-788-1514	12/1/12
12. Beth Stewart	<i>Beth Stewart</i>	141 CRANESIDE DR	Hailey	788-583-4132	12/1/12
13. Ellen Tracy	<i>Ellen Tracy</i>	PO Box 1335	Ketchikan	720-7863	12-1-12
14. Jane McGraw	<i>Jane McGraw</i>	Box 309	Hailey	788-5143	12-1-12
15. Mary Ellen Kelly	<i>Mary Ellen Kelly</i>	Box 1251	Hailey	788-4693	12/1/12

Petition to Establish a New Idaho Public Charter School

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Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT, No physical location determined to date.			
<input checked="" type="checkbox"/> I am currently a qualified elector in the above-named school district. <input checked="" type="checkbox"/> I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School.					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
1 Tira Scott	<i>Tira Scott</i>	109 Buena Vista Blvd	Ketchum	523-3345718	10-28-12
2 Billie Brown	<i>Billie Brown</i>	420 Whitetail	Hailey	208-578-9648	10-29-12
3 Amy Schatter	<i>Amy Schatter</i>	311 Oak St. Blue	Bellevue	208-720-7128	10-29-12
4 WENDY GARDNER	<i>Wendy Gardner</i>	P.O. Box 5832	Ketchum	208-720-7106	10-29-12
5 JACQUELINE	<i>Jacqueline</i>	2910 Woodside Blvd	Hailey	208-720-1427	10-29-12
6 Matthew Filoon	<i>Matthew Filoon</i>	418 Warm Springs Rd.	Ketchum	208-309-0243	10/29/12
7 JENNIFER	<i>Jennifer</i>	418 Warm Springs Rd	Ketchum	208-320-5757	10/29/12
8 Virginia Smith	<i>Virginia Smith</i>	221 Della Vista	Hailey	208-720-4083	10/30/12
9 Brenda Sanders Lyn	<i>Brenda Sanders Lyn</i>	220 Della Vista Dr.	Hailey	208 806 0360	10/30/12
10 Courtney Gruber	<i>Courtney Gruber</i>	610 Bonanza Ln	Hailey	651-709-4232	10/30/12
11 Bobbi Filbert	<i>Bobbi Filbert</i>	460 Maple Ridge Loop	Bellevue	208-727-7114	10/30/12
12 MATT CRAWFORD	<i>Matt Crawford</i>	803 300	HAILEY	208-708-9729	11/22/12
13 Kerry Brokaw	<i>Kerry Brokaw</i>	109 Pioneer Rd	Ketchum	208-928-6424	11/26/12
14 Steve Grover	<i>Steve Grover</i>	911 Eastridge Dr	Hailey	208-788-2373	11/26/12
15 John DeLorenzo	<i>John DeLorenzo</i>	100 Mustang Ln	Bellevue	208-721-7783	11/26/12

4/16/2008

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Petition to Establish a New Idaho Public Charter School

This document is an **Elector Petition** and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT			
<ul style="list-style-type: none"> I am currently a qualified elector in the above-named school district. I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School. 					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
✓ 16 Elizabeth Schwerdtle	[Signature]	11 Big Dipper Lane	Hailey	788-4058	12/1/12
✓ 17 MARY ANN CHAMBERS	[Signature]	131 Laurel Lane	KL/Chin	726-7719	
18					
✓ 19 Kathleen Schwanenberg	[Signature]	510 3rd	Hailey	788-9088	12/1/12
✓ 20 Beanna Hull	[Signature]	202 Winterberry Loop	Hailey	309-2190	12/12/12
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4/16/2008

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August 15, 2013

JOLYNN DRAGE
CLERK OF THE DISTRICT COURT, EX-OFFICIO AUDITOR
AND RECORDER, BLAINE COUNTY
201 FIRST AVENUE SOUTH, SUITE 200
HAILEY, IDAHO 83333
TELEPHONE: (208) 788-5505 · FACSIMILE: (208) 788-5501
E-mail address: jdrage@co.blaine.id.us

July 3, 2013

STATE OF IDAHO)
County of Blaine) §

To: Mary Gervase
P.O. Box 300
Hailey, ID 83333

RE: Public Charter School Petition

I, JoLynn Drage, County Clerk for Blaine County, hereby certify that 22 signatures on this Petition are those of qualified electors.



Signed:

Julia London
County Clerk or Deputy

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August 15, 2013

Petition to Establish a New Idaho Public Charter School

This document is an Elector Petition and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT, No physical location determined to date.			
<input checked="" type="checkbox"/> I am currently a qualified elector in the above-named school district. <input checked="" type="checkbox"/> I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School.					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
✓ 1 RYAN FIELD STROTH	<i>[Signature]</i>	117 W. BULLION ST	HAILEY	788-1225	12/2/2012
✓ 2 ANNE MULICK	<i>[Signature]</i>	251 Melrose St.	Bellevue	788-4268	12/12/12
✓ 3 KELLY MORELAND	<i>[Signature]</i>	200 Cranbrook Rd.	Hailey	788-9399	12/12/12
✓ 4 Deborah Mitchell	<i>[Signature]</i>	225 W. Walnut	Hailey	720-4009	12/12/12
NO 5 MORIA LAR	<i>[Signature]</i>	312 5th St.	Bellevue	994-1712	12-12-12
✓ 6 CHRISTINA ARPP	<i>[Signature]</i>	3181 Shenandoah Dr	Hailey	720-481-0385	12-12-12
✓ 7 JENNIFER BHANNINGMEIER	<i>[Signature]</i>	1141 Broadford	Hailey	788-8669	12-12-12
✓ 8 DAVE JOHANNINGMEIER	<i>[Signature]</i>	1141 Broadford Rd	Hailey	788-8669	12-12-12
✓ 9 KEN OCLASSEN	<i>[Signature]</i>	212 RED DOG DR	HAILEY	720-3031	12-14-12
✓ 10 LINDA KELSER	<i>[Signature]</i>	1211 BROADFORD RD	HAILEY	720-2429	12/17/12
✓ 11 SHANNON THOMAS	<i>[Signature]</i>	790 S. main st	Bellevue	721-2518	12/20/12
✓ 12 JOHN LEWIS	<i>[Signature]</i>	1920 LAURELWOOD	HAILEY	928-6466	1-3-13
NO 13 HOWARD GARDNER	<i>[Signature]</i>	109 S. 3rd Street	Bellevue	788-1711	1-3-13
✓ 14 CLIFF H. STERN	<i>[Signature]</i>	3711 W. WILSON BLVD.	Hailey	928-6050	1-3-13
✓ 15 MICHELLE SANDOZ	<i>[Signature]</i>	520 2nd Ave	Hailey	720-5187	1-5-13

4/16/2008

August 15, 2013

788-5570
Elections Office

Petition to Establish a New Idaho Public Charter School

This document is an **Elector Petition** and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT, No physical location determined to date.			
<input type="checkbox"/> I am currently a qualified elector in the above-named school district.					
<input type="checkbox"/> I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School.					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
✓ 16 PETER SCHMIDT	Peter Schmidt	1111 ROSEN OF THE HILLS	Healy	208-578-0073	1/16/2013
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August 15, 2013

Petition to Establish a New Idaho Public Charter School

This document is an Elector Petition and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		WOOD RIVER WALDORF METHODS SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT, No physical location determined to date.			
<input checked="" type="checkbox"/> I am currently a qualified elector in the above-named school district. <input checked="" type="checkbox"/> I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School.					
Elector's Printed Name	Elector's Signature	Street Address	City	Telephone	Date
✓ 16 <u>MARY FINNERTY</u>	<u>Mary Finnerty</u>	<u>212 Winterberry</u>	<u>Hailey</u>	<u>208 309 0680</u>	<u>12/14/2012</u>
✓ 17 <u>Patricia Ann Meyer</u>	<u>Patricia Ann Meyer</u>	<u>311 N 2nd Ave</u>	<u>Hailey</u>	<u>208 720-4313</u>	<u>12/14/12</u>
✓ 18 <u>Chris Gripey</u>	<u>Chris Gripey</u>	<u>1511 Heroic Rd</u>	<u>Hailey</u>	<u>208 720 8814</u>	<u>12/14/12</u>
NO 19 <u>Jennifer Teisinger</u>	<u>Jennifer Teisinger</u>	<u>1511 Heroic Rd</u>	<u>Hailey</u>	<u>208 720 4331</u>	<u>12/14/12</u>
✓ 20 <u>Janelle Connors</u>	<u>Janelle Connors</u>	<u>640 Deerfield Dr.</u>	<u>Hailey</u>	<u>208 720-7427</u>	<u>12/15/12</u>
✓ 21 <u>Alex Margolin</u>	<u>Alex Margolin</u>	<u>21 Comet Ln #3</u>	<u>Hailey</u>	<u>415 860 2575</u>	<u>12/15/12</u>
✓ 22 <u>SANDY KELLY</u>	<u>Sandy Kelly</u>	<u>106 N. Angela Dr</u>	<u>Hailey</u>	<u>208-788-7540</u>	<u>12-31-12</u>
✓ 23 <u>Phoebe Pilaro</u>	<u>Phoebe Pilaro</u>	<u>110 S. 2nd Ave.</u>	<u>Hailey</u>	<u>208-309-0255</u>	<u>1/15/12</u>
✓ 24 <u>Jay Spencer</u>	<u>Jay Spencer</u>	<u>1340 Blue Lake Dr.</u>	<u>Hailey</u>	<u>208-720-9615</u>	<u>1/15/12</u>
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August 15, 2013

JOLYNN DRAGE
CLERK OF THE DISTRICT COURT, EX-OFFICIO AUDITOR
AND RECORDER, BLAINE COUNTY
201 FIRST AVENUE SOUTH, SUITE 200
HAILEY, IDAHO 83333
TELEPHONE: (208) 788-5505 · FACSIMILE: (208) 788-5501
E-mail address: jdrage@co.blaine.id.us

July 10, 2013

STATE OF IDAHO)
) §
County of Blaine)

To: Mary Gervase
P.O. Box 300
Hailey, ID 83333

RE: Public Charter School Petition

I, JoLynn Drage, County Clerk for Blaine County, hereby certify that 10 signatures on this Petition are those of qualified electors.

Signed:

County Clerk or Deputy



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August 15, 2013

Petition to Establish a New Idaho Public Charter School

This document is an Elector Petition and must be signed by not less than thirty (30) qualified electors of the attendance area of the new charter school. Proof of elector qualifications must be provided with the petition.

Name of Proposed New Charter School		SYRINGA MOUNTAIN SCHOOL			
School District Where New Charter School will be Physically Located		BLAINE COUNTY SCHOOL DISTRICT, No physical location determined to date.			
<input checked="" type="checkbox"/> I am currently a qualified elector in the above-named school district. <input checked="" type="checkbox"/> I agree that the above-named proposed new charter school should be approved as an Idaho Public Charter School.					
Elector's Printed Name	Elector's Signature	Physical Address	City	Telephone	Date
1 Susan Martin	[Signature]	2320 Ashcroft Hwy	Hailey	208-285-4311	1/26/2013
2 Ginger Ferris	[Signature]	1020 16th Ave	Hailey	208-720-8462	5/30/13
3 Tom Ferris	[Signature]	" "	" "	208-229-9654	"
4 Heath Schneider	[Signature]	1141 Creekside Dr. 83333	" "	208-953-4138	"
5 Whitney Schneider	[Signature]	1141 Creekside Hailey	Hailey	571-201-8303	5/30/13
6 Beccuel Smith	[Signature]	721 Angelus Dr.	Hailey	928-6517	5/30/13
7 Shannon Sisk	[Signature]	391 Croy Creek	Hailey	578-2040	5/30/13
no 8 Cuyler Smalley	[Signature]	invalid address 4040 Red Elephant Dr	Hailey	308-0497	6/1/13
no 9 [Name]	[Signature]	460 Maple Ridge Loop	Belleuve	727-7117	6/1/13
10 Terayakola	[Signature]	1017 N 2nd Ave	Hailey	(413) 281-4366	6/1/13
no 11 Nohie Shaw	[Signature]	not signed, invalid address PO Box 4142	Hailey		6/29/13
12 Kim Higgins	[Signature]	920 Northstar Dr	Hailey	188-3031	6/27/13
no 13 Dana Blane not registered	[Signature]	201 Tendency	Belleuve	733-2271	7/2/13
14 Kurt Nelson	[Signature]	1630 Heroic Rd	Hailey	720-7804	7/2/13
15					

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APPENDIX C Charter Start Workshop Attendance

CERTIFICATE OF ATTENDANCE

This certificate is awarded to

Mary Gervase



Idaho State Department of Education
Charter Start Workshop
October 4 & 5, 2010

Michelle Vincent Taylor
School Choice Coordinator

**Think Charter Schools
it's all about the students**

Certificate of Attendance

This certificate is awarded to

Don Keller

For attending the Charter Start! 101 Workshop

February 28th & March 1, 2013



Michelle Bennett Taylor

School Choice Coordinator

APPENDIX D Board of Directors Resumes, Consultants
Resumes and Petitioning Group List .

August 15, 2013

DR. MARY GERVASE

PO Box 300, Hailey, Idaho 83333 208-788-9729, 208-720-6327 marymgervase@yahoo.com

EDUCATION:

PH.D. 1995 - Educational Administration, University of New Mexico, Albuquerque, NM
M.A. 1980 - Educational Psychology, University of Utah, Salt Lake City, Utah
B.A. 1975 - Elementary Education, Westminster College, Salt Lake City, Utah

PROFESSIONAL EXPERIENCE:

2012-2013 : **Consultant**, Idaho Leads Project, Boise State University, Center for School Improvement and Policy Studies, 1910 University Drive, MS1905, Boise, Idaho 83725-1905

2011-2013-**Consultant/ISEE Navigator**, Idaho State Department of Education,

2009-present-**Consultant/Capacity Builder**, Idaho State University Intermountain Center for Education Effectiveness. 921 S. 8th Ave., Stop 8019, Pocatello, Idaho 83209

2008-present-**Consultant/Capacity Builder**, Boise State University Center for School Improvement and Policy Studies, 1910 University Drive, Boise, Idaho 83725-1745

2007 – 2009 –**Director of Education**, 2009 Special Olympics World Winter Games, 3150 W Main St, Boise, ID 83702

2001-present –**Adjunct Professor**, College of Southern Idaho, 1053 Fox Acres Road, Hailey, Idaho 83333, Northwest Nazarene University, 623 Holly Street, Nampa, Idaho 83686 , Boise State University Center for School Improvement and Policy Studies, 1910 University Drive, Boise, Idaho 83725-1745

2005-present-**Executive Director, Co-Founder**, Sun Valley Spiritual Film Festival, Post Office Box 3531, Hailey, Idaho 83333

1999 – 2007 - **Assistant Superintendent/Curriculum Director, Chief Academic Officer**, *Blaine County School District*, 118 West Bullion Street, Hailey, Idaho 83333

1995 – 1999 – **Principal**, *Mountain Elementary School*, 2280 North Road, Los Alamos, New Mexico 87544

1994 – 1995 – **Assistant Principal**, *Los Alamos Middle School*, 1 Hawk Drive, Los Alamos, New Mexico 87544

1995 – **Adjunct Professor**, College of Santa Fe, Santa Fe, New Mexico 87505 Educational Leadership graduate course

1989 – 1994 – **Assistant Director, School Program and Professional Development Unit**, *New Mexico State Department of Education*, Education Building, Santa Fe, New Mexico 87501

1988-1989 – **Educational Consultant, Guidance and Counseling**, *New Mexico State Department of Education*, Education Building, Santa Fe, New Mexico 87501

1987 – 1988 – **Project Director, Native American Adolescent Injury Prevention Project**, *New Mexico Health and Environment Department*, Public Health Divisions, Runnels Building, Santa Fe, New Mexico 87504

1983 – 1986 – **Guidance Counselor and Teacher**, *Department of Defense Dependent Schools*, Edzell, Scotland

1981 – 1983 – **Guidance Counselor**, *Raton Public School*, Raton, New Mexico 87740

1980 – 1981 – **Teacher**, *Department of Defense Dependent Schools*, Berlin, Germany

1976 – 1980 – **Teacher**, *Salt Lake City Public Schools*, Salt Lake City, Utah 84111

CERTIFICATION, PROFESSIONAL ORGANIZATIONS, BOARDS:

- ✦ Idaho Association of School Administrators, Member, 2000 to present.
- ✦ Associate Editor, *The International Journal of Diversity in Education*, 2012
- ✦ Associate Editor, *The International Journal of Learning*, 2012
- ✦ Associate Editor, *The International Journal of Knowledge, Culture and Change Management*, 2012.
- ✦ Idaho Special Olympics Board Member, 2009 to present.

August 15, 2013

- ✧ Co-founder and director of the Sun Valley Spiritual Film Festival, 2005 to present
- ✧ Idaho Liaison for the National Forum on Education Statistics, 2004 to 2006
- ✧ Sun Valley Center for the Arts Board Member, 2004 to 2008
- ✧ Animal Shelter of Wood River Valley Board Member 2002 to 2006; Education Committee chair 2004-present
- ✧ College of Southern Idaho, Hailey Campus Advisory Board Member and instructor, 2002 to present
- ✧ Idaho Certification-Administrator, Superintendent, School Principal K-12
- ✧ Previous certification-Elementary K-8 and K-12, Guidance Counseling K-12, Educational Administration K-12
- ✧ Member – National Board of Certified Counselors, National Association of School Administrators, Association for Supervision and Curriculum Development, Idaho Association of School Administrators

RECENT AWARDS, RECOGNITION:

- ✧ Award Recipient, Japan Fulbright Memorial Scholarship, October 2005

RECENT PUBLICATIONS, PRESENTATIONS:

- ✧ *A More Inclusive World Starts with Education*, Hawaii International Conference on Education, Honolulu, Hawaii. Paper accepted for presentation January 2009.
- ✧ *The Business of Evaluation: A 360-degree perspective applied to the evaluation of educators*, June 2007, presentation accepted to the International Conference on Learning, Johannesburg, South Africa.
- ✧ *The Milepost Program: Ensuring academic success for all students*, January 2007, presentation accepted, Hawaii International Conference on Education, Honolulu, Hawaii. Paper publication pending juried review.
- ✧ *The Business of Evaluation: A 360 degree perspective*, July 2006, presentation at the International Conference on Knowledge Culture and Change in Organizations, Prato, Italy. Paper published.
- ✧ *Forum Guide to the Privacy of Student Information: A resource for schools*, 2006, co-author, National Forum on Education Statistics, U.S. Department of Education
- ✧ *How one public school district ensures academic success for all students, regardless of ethnicity and exceptionality*, June, 2005. Presentation at the Fifth International Conference on Diversity in Organisations, Communities and Nations, Beijing, China
- ✧ *How one public school district ensures academic success for all students, regardless of ethnicity and exceptionality*, 2006, published in the International Journal of Diversity in Organisations, Communities and Nations, Common Ground Publishing
- ✧ *How one public school district ensures academic success for all students, regardless of ethnicity and exceptionality*, 2005 and 2006 presentations at the U. S. Department of Education, National Center for Education Statistics Annual Conference.
- ✧ *Making the Grade*, 2004 published in *Partners in Education*, Blaine County School District
- ✧ *The Blaine County 360 Degree Administrative Evaluation Process*, 2004 *Perspectives* Vol. XXIV, Idaho Association of School Administrators Annual Publication
- ✧ *360 Degree Accountability*, Presentation, 2001 Idaho Superintendents Annual Conference
- ✧ *The Present and Future Roles and Services of a State Education Agency As Perceived by Educators, Legislators, Community Members and Agency Employees*. 1995. Dissertation. University of New Mexico

References:

Deb Pfof, Southeast Regional School Improvement Coordinator, Idaho Capacity Builders, pfosdebr@isu.edu 208-403-3698

Dr. Jim Brown, Principal, Bridge Academy, Twin Falls School District, brownji@tfstd.k12.id.us, 208-320-0459

Patti O'Dell, Associate Superintendent, Twin Falls School District, Odellpa@tfstd.org, 208-733-6900

BENJAMIN ROGERS

(208) 471-0061

ben@tsema.com

FINANCIAL ENGINEER / TRADER

Results-driven, profit-minded, Chicago-trained MBA with the powerful combination of econometric expertise, practical trading experience and strong communication skills. Strengths include:

High Frequency Trading Strategies	Forecasting Equity Returns & Volatility	Statistical Arbitrage
Econometrics & Statistics	Computer Programming	Tactical Asset Allocation
Investment Analysis & Management	Portfolio Analysis & Management	Performance Measurement

PROFESSIONAL EXPERIENCE

SUN VALLEY GOLD, LLC, Sun Valley, ID – *Hedge Fund Manager and Investment Advisory*

Financial Engineer, 2010 – Present

- Research and development of algorithmic trading strategies
- Development of all components of a proprietary automated trading system

MATLOCK CAPITAL, LLC, Chicago, IL – *High Frequency Equity and Equity Options Trading Firm*

Financial Engineer / Trader, 2004 – 2010

- Equity Portfolio: operated on multiple exchanges in the markets for 300 U.S. equities, providing liquidity through a C#-based automated trading system. As **lead financial engineer** and **co-manager** of the portfolio, I was responsible for design, development, and implementation of the system's primary business components: a short-term forecast, trade logic and risk management.
- Options Portfolio: operated on multiple exchanges in the options and underlying markets for 200 U.S. equities and 18 ETFs, providing liquidity through a C#-based automated trading system. As a **senior financial engineer**, I was responsible for research and development of the volatility forecasts and a contributor to the logic that drove trading decisions.
- Reporting & Monitoring Tools: for both portfolios, I designed and automated:
 - real-time monitoring tools to periodically generate reports based on system logs
 - a suite of daily reports to effectively and efficiently communicate performance to the company and board of directors
- Expertise in a variety of statistical packages, programming languages and databases, including:

C#	Visual Studio	VB/VBA	S-Plus / R
Matlab	Minitab	SQL Server	Excel / Access

TSEME CAPITAL MANAGEMENT, Sun Valley, ID – *Long/Short Hedge Fund*

Financial Engineer / Trader, Partner, 2002 - 2004

- Involved from inception of fund in all aspects of administration, operations and marketing
- Research, development, and implementation of relative value trading strategies

MERRIL LYNCH, New York, NY

Database Applications Consultant, 1999 - 2000

Operations Associate, 1998 - 1999

- Acted as internal consultant-at-large developing a range of database-driven applications
- Supported all aspects of operations for derivatives and swaps group

EDUCATION

U. CHICAGO BOOTH SCHOOL OF BUSINESS: **MBA (Honors), Analytic Finance, Econometrics & Stats**

CORNELL UNIVERSITY:

Bachelor of Arts, Economics

CERTIFICATIONS:

Series 7

References:

Lara Stone, Sun Valley Gold LLC, 208-726-2327

Blair Hull, Matlock Capital, (312) 560-1100

Phoebe Pilaro

110 South Second Avenue, Hailey, Idaho 83333 208.309.0255 pipilaro@earthlink.net

EDUCATION

- University of California, Santa Barbara. 1994
BA in Environmental Studies and Botany.
- Bellas Artes, San Miguel De Allende, Mexico. 1999
6 month ceramic intensive.
- Iyengar Yoga Institute of San Francisco. 2002
2-Year Advanced Studies Program
- Countless Yoga workshops 1998-Present
including one month study in India.

EXPERIENCE

- Anatomy in Clay Teacher at the Sage School October, 2010-May, 2011
- Volunteer at The Hunger Coalition September, 2009-June, 2011
- Temporary Studio Manager for Boulder Mountain Clay Works 2003
- Yoga Teacher 1998-Present
- Instructor for Pacific Crest Outward Bound 1994-2002
- Instructor for Naturalists At Large 1994-1999

CERTIFICATIONS

- Certified Level II Iyengar Yoga Instructor
- Wilderness First Responder, CPR
- Swedish and Deep Tissue Massage

INTERESTS

- Ceramics, Yoga, Dance, Music, Painting

References Upon Request

References:

Kate Woods, 208-720-4883, kate@themountainschool.info

Tener Rogers 208- 720-6441, tenerrogers@yahoo.com

Svea Grover 208-720-0377, svearae@msn.com

Donald J. Keller

Education **B.S. Fisheries Science**, New Mexico State University, May 1981
Administrative Leadership Certification, University of Idaho, 09/01/2006
Master of Technology in Education, Lesley College, May 1999
Post Graduate Administrative Leadership, University of Nevada, Reno, NV
36 Post Master Credits
22 contracted years as a teacher or administrator

**Professional
Experience**

Sage International School of Boise (2009-Current)

- New School Coordinator/Principal

Riverstone International School (2008-2009), Boise, ID

- International Baccalaureate 7th/8th science teacher
- Outdoor program leader

High School Biology Teacher (2005-2008), Skyview High School, Nampa School District, Nampa, ID

- Sophomore biology teacher
- Sophomore house team leader
- District school improvement team member
- Sophomore house academic intervention team member

Middle School Summer School Principal (summer 2007), South Middle School, Nampa School District, Nampa, ID

Elementary Summer School Principal (summer 2006), Snake River Elementary School, Nampa School District, Nampa, ID

Elementary School Assistant Principal (2001-2005), Snake River Elementary School, Nampa School District, Nampa, ID

- Managed school operations and budget
- Supervision and evaluation of certified and classified staff
- Managed and maintained school discipline and attendance
- Managed partnership between school and Boys and Girls Club of Nampa, ID.

Elementary Summer School Assistant Principal (summers, 2002-03), Snake River Elementary School, Nampa School District, Nampa

References: Michelle Clement Taylor, School Choice Coordinator, Idaho State Department of Education, mtaylor@idaho.state.gov, 208-332-6963

August 15, 2013

Greg Bloomfield
PO Box 757, Hailey, ID 83333
205 Equus Drive, Bellevue, ID 83313
208.720.0250 cell
208.788.1100 work

Greg Bloomfield
PO Box 757, Hailey, ID 83333
205 Equus Drive, Bellevue, ID 83313
208.720.0250 cell 208.788.1100 work



Experience

Wood River Insurance, Inc., Hailey, ID 1984-2013 (present)

President, Owner, and Principal Broker until December, 2102. Sold ownership then, currently employed as President of the organization.

Involved in all aspects of day-to-day operations, as well as sales, marketing, human resources, financial management, long-term planning

Sun Valley Magazine, Ketchum, ID 1983-1984

Advertising sales rep

VP Directory Graphics, Inc., Kirkland, WA 1981-1983

Advertising sales rep, Shareholder and manager for 10-person team

GTE Directories Corporate, Everett, WA 1978-1981

Advertising sales rep

Board and Community Service

Hailey Rotary Club, Past President and Board Member 2001- 2013 (present)

Served as President of the Club from 2003-2004, Board member 2000 -2006. Helped create and implement Hailey Rotary's 4th of July fundraiser, Road Apple Roulette. Continue to be a member and attend weekly meetings.

Independent Insurance Agents of Idaho 2001-present

Served as State President for 134-member trade organization 2008-2009. Numerous committee responsibilities include; Chair for national /state political action committee "Insurpac" for 8 years -- participation and donation amounts tripled by Idaho members during tenure. Idaho 1-of-4 states recognized at Big I National conference in Washington, D.C. in April 2010 and April 2012 for its' level of donations made to our PAC.

Company of Fools, Board Member 2006-2012

Hailey, Idaho: 6 years board service to this local performing arts organization. Committee responsibilities included governance and corporate giving.

Big Brothers/Big Sisters of Hailey, Idaho 2009 – 2011

Served as mentoring Big Brother to a local young man. Local chapter folded and boy moved out of area.

References:

Dr Frank Fiaschetti, MD, 208-726-1765, Box 248, Ketchum, Idaho 83340

Gregory Cappel, CFP, Money Concepts, 208-788-7500, 126 S Main, Hailey, Id 83333

August 15, 2013

Travis Scott

PO Box 1121, Hailey, ID 83333 208-720-8784 mrtwscott@gmail.com

Education

2011-2013 **Waldorf Teacher Training**, Micha-el Institute, Milwaukee, OR
2009- **Certified Massage Therapist**, Myotherapy Institute of Massage, Salt Lake City, UT
1995 **B.A., English Literature**, Centre College, Danville, KY

Professional Experience

2012-present **Class Teacher**, The Mountain School, 100 Mustang Lane, Bellevue, Idaho 83313

2011-2012 **Assistant Class Teacher**, The Mountain School, 100 Mustang Lane, Bellevue, Idaho 83313

2010-present **Wellness Educator and SRI Facilitator**, Wise World Seminars, 444 North Main Street, Longmont, CO 80501

2009-2013 **Founder/Wellness Facilitator**, The Well Life Center, Suite 302, 401 S. Main St., Hailey, ID 83333

2007-2009 **Wellness Facilitator**, Café of Life Chiropractic, Ketchum, ID 83333

2002-2007 **Carpenter**, Right Angle Construction, Hailey, ID 83333

2000-2002 **Manager**, Wilderness River Outfitters, PO Box 72, Lemhi, ID 83465

1995-2007 **Lead Wilderness Guide**, Wilderness River Outfitters, PO Box 72, Lemhi, ID 83465

References

Fran Tonsmeire, Owner, Wilderness River Outfitters, Lemhi, ID (208)-756-3959

Ryan Redman, Executive Director, The Flourish Foundation, Ketchum, ID (208) 450-9309

Jim Mulenos, Asset Research, Sun Valley, ID (208) 720-5433

Rod Hawkins, Right Angle Construction, Hailey, ID (208) 481-0285

PetitionGroup

The Founders of Syringa Mountain School represent a larger group of interested and committed parents, educators, and community members. The Founders are already in process of screening and preparing future Governing Board members. These include a realtor, former charter school founder, CEO science related industry, Human Relations Director. SMS Board has chosen to first have prospective Board members serve on committees to vet them for future election or appointment to the Board.

Mary Gervase is the part time Director of The Mountain School and an educational consultant for the Idaho State Department of Education Capacity Building Project. She was the Executive Director and Co-Founder of the Sun Valley Spiritual Film Festival. She has served as the Director of Education for the 2009 Special Olympics World Winter Games, as well as the Assistant Superintendent of the Blaine County School District, in Hailey, Idaho. She has worked as a K-8 elementary teacher, a school guidance counselor, an assistant principal and principal, and as a State Department of Education consultant in locations spanning Utah, Idaho, New Mexico, and with the Department of Defense Dependent Schools System (DODDS) in both Scotland y. Her education includes a Bachelors Degree in Elementary Education, a Masters Degree in Educational Psychology, and a Ph.D. in Educational Administration.

Ben Rogers is employed as a Financial Engineer with the hedge fund manager Sun Valley Gold. In this capacity he is responsible for research, development, and implementation of automated trading strategies. Ben holds a BA in Economics from Cornell University and an MBA (Honors) from the University of Chicago Booth School of Business. He resides in the Sun Valley, Idaho area and is the father of two children that attend The Mountain School, a private Waldorf school. The enthusiasm of his children for this school has motivated him to help make Waldorf education available to all children of Sun Valley.

Travis Scott is a native of western Montana and grew up immersed in wilderness and animal care. Travis lives in Hailey with his wife, Carrie, and daughter, Cora, and is currently enrolled in the Micha-el Institute Waldorf Teacher Certification in Portland, Oregon. He earned a B.A. in English Literature from Centre College in Danville, Kentucky in 1995. Travis has a decade of experience as a wilderness river guide, has taught skiing and swimming, and has a wide range of woodworking skills. Travis has a passion for human growth and helping each person express their deepest potential. In addition to his Waldorf studies and teaching, Travis owns and operates The Well Life Center in Hailey, dedicated to innovative means of enhancing wellness and health.

Don Keller serves as our charter school expert. He brings over 26 years of educational experience to Syringa Mountain School. He has experience working as a school administrator and teacher in the elementary, middle, and high school levels. Don was an original founder of the Sage International School of Boise and currently serves as the schools Executive Director. He is an active member of the Idaho Charter School Network and has provided extensive consulting and mentoring to start up charter school groups. When he is not running schools and doing educational research, Don enjoys the mountains, reading, traveling, and spending time with his family.

Joy Higdon Spencer serves as our liaison with the Blaine County School District. She is currently a first grade teacher in the Blaine County School District. She has worked in a variety of capacities in the education arena, as a teacher, para-professional and as an outdoor educator and naturalist guide. She received her MA in Elementary Education from Western Governors University and her BA in Environmental Studies and Biology from University of Tennessee. Her son has had the great fortune to attend Waldorf schools and camps, of which Joy is a huge advocate. She is an innovative and compassionate educator, who believe children have the right to a holistic education that fosters increased understanding of our natural world coupled with global awareness and 21st century skills.

Greg Bloomfield is a business man with 29 years of experience managing the overall operations of one of the more respected Independent Insurance Agencies in the state of Idaho. From his 1984 start in the industry as a salesperson in a very small organization, Greg has led his company to become one of Hailey's larger employers. He successfully sold the firm in

August 15, 2013

December of 2012, however, he remains its' President and enjoys a less demanding role in the day to day operations of the agency. This move was contemplated for the purpose of having more time to devote to his 2 younger children, 8 and 11, who were each adopted in China as 9 month olds. Greg's business was awarded Business of the Year by the Ketchum-Sun Valley chamber of Commerce in 2004, recognizing the organization's commitment to community support and volunteer contributions of its staff. Greg served on the board of the Independent Insurance Agents of Idaho for many years and was elected its' President in 2010. He served 5 years on the board of Company of Fools, Hailey's award winning theater company. Additionally Greg served as President of Hailey's Rotary Club in 2004-05 and sat on its' board for many years.

Greg was raised on the east coast, migrating to Idaho in 1976 where he enjoys hunting, golf, and the great outdoors. He and wife Annie, along with daughters Grace and Gaby, live on a small ranch south of Bellevue, replete with 5 horses, 3 dogs, and a trout pond. In the winter of 2013, the family spent the winter in Mexico, where all were involved successfully in the home schooling environment.

Additionally, a number of people have assisted with this petition:

Randy Flood, Realtor, Site Committee and Underconsideration for Board service

Selim Star, Attorney, Donated legal advise

Sheila Lierman, Realtor, Site Committee

Mike Schlatter, DL Evans Bank, Finance Committee

Svea Grover, Administrator, The Mountain School, PR/Marketing Committee

Becquel Smith, HR Director, Marketron, PR/Marketing Committee

Tener Rogers, Parent Association President, The Mountain School, PR/Marketing Committee

Rob Clayton , Director, Sun Valley Ski Education Foundation, past Headmaster, charter founder, Under consideration for Board

Karen Waters, Graphics

Terry Smith, Education Reporter for the Mountain Express

Kate Sokoloff, Economics and Education, Future Board Member

The Woods Family and Kate Wood, Donors

Dr. Lonnie Barber, BCSD Superintendent

Michelle Clement Taylor, School Choice Coordinator, SDE, Advisor

APPENDIX E Contracts, Leases, and Collaborations

Katherine Woods-offering to lease the farm to the charter school so that the farm and garden aspects of the curriculum can be delivered even if the school is located on a temporary city site.

Don Keller-financial oversight

Duan Sorensen-Child nutrition

Anji Bauman-Child nutrition

Anonymous donation of \$500,000

Woods Family donation of school furnishings

Star Law Offices donation of limited legal services

Jason Miller-donation of discounted bus passes to all SMS students to augment transportation needs

YMCA after school and summer camp collaboration

Nurture-garden and farm curriculum collaboration

Pesky Center and BSU offer to assist with research

BSU Special Education Department offer to assist with research

Stephanie Skinner-common core aligned Waldorf curriculum

Flourish Foundation collaboration with mindful awareness training

AWSNA statement of relationship between Waldorf private and charter schools

August 15, 2013

From: Katharine Woods <kwoods@themountainschool.info>
To: Mary Gervase <Marymgervase@yahoo.com>
Sent: Monday, July 15, 2013 4:48 PM
Subject: 100 mustang lane lease memo

Hi Mary,

Here is the memo on leasing 100 mustang lane, in necessary.

All the best,

Kate

Memo on Leasing 100 Mustang Lane

The following memo details the terms and conditions of a lease of the site and facilities located at 100 Mustang Lane, Bellevue, ID ("Lease") by Katherine Woods to Syringa Mountain School ("SMS").

Katherine Woods is willing to offer the Lease to SMS under the following terms and conditions:

(1) Facilities, all currently utilized by The Mountain School:

(a) School Building, 2,000 sq. ft.

(b) Office, 400 sq. ft.

(c) Pre School Room, 300 sq. ft.

(d) Farm Yard, Garden, Playground, 1/2 acre

(e) Parking Lot

(2) Will lease all facilities on a year-to-year basis

(3) Annual/Monthly rental rate equal to the market rate.

(4) SMS will pay all utilities and insurance

Yours truly,

Katharine Woods

100 Mustang Lane

Bellevue, ID 83313

(208) 720-4883

kwoods@themountainschool.info

July 15, 2013

August 15, 2013



To: Syringa Mountain School and PCSC

This letter is to verify that Sage International School of Boise will be providing business manager services to the Syringa Mountain School for the 2014-15 school year. Continued services if needed beyond the 2014-15 school year will be determined by mutual agreement between Syringa and Sage International

Please contact Don Keller if additional information is needed.

Don Keller

Executive Director

Sage International School

995-0302

www.sageinternationalschool.org

July 15, 2013

To Whom It May Concern,

I am the current director of food services here in Blaine County Schools and have spoken to Mary Gervase concerning the food program that will be available in the new Syringa Mountain School, I am fully prepared to partner with this new school to build a viable child nutrition program utilizing local produce and businesses to provide a wholesome and creative child nutrition program at this school. I realize this will be an undertaking that would require flexibility and vision and I am willing to be a part of this process.

As our county seeks to utilize healthier, local options I see this endeavor as a possible transition for the school district towards a more sustainable direction in the food service. My hope is that different ideas and options for this new school could open up new and better opportunities for the students district-wide. I invite new ideas to be presented as our entire country explores ideas for ways to move towards teaching and encouraging healthier lifestyles.

Thank you for your time and attention.

Sincerely,

Duane Sorensen
Blaine County Food Service Director

August 15, 2013

July 25, 2013

Dear Charter Commission,

I am the Child Nutrition Director for Gooding and Shoshone School Districts. I recently met with Ms. Mary Gervase regarding the implementation of a child nutrition program for Syringa Mountain School, the Wood River Valley's first Charter School.

The Child Nutrition Programs at both Gooding and Shoshone provide their students high quality meals. All meals are rich in whole grains and include an unlimited amount of fresh fruit and vegetables daily with every meal served.

Five years ago, we began purchasing watermelon from a local farmer. Our farm to school program continues to expand each year and is an integral part of our success. Our district remains committed to purchasing local foods whenever available.

Gooding School District remains the first and only school district in Idaho to have been named a district of excellence by the School Nutrition Association. In 2004, Gooding Elementary was the first school in the Western Region to obtain the Gold Award, in the Healthier US School Challenge. An award achieved by going above and beyond the federal standards for school meals, physical activity, and nutrition education. In 2009, Gooding Elementary became the first school in the Nation, to receive the Gold with Distinction award under even stricter guidelines and Gooding Middle School is currently seeking their first award under the most recent USDA guidelines.

As you can see we are passionate about our programs and I am writing this letter to express my intent to offer Syringa Mountain School some guidance establishing a successful USDA child nutrition program utilizing locally grown foods. We hope our experience and knowledge will help and inspire others to create innovative programs for all students through the National School Lunch Program.

Sincerely,

**Anji Baumann, CDM, CFPP
Child Nutrition Director
Gooding & Shoshone School Districts**

Subject: Memo on Anonymous Donation
From: Ben Rogers (brogers75@yahoo.com)
To: marymgervase@yahoo.com;
Date: Friday, July 12, 2013 11:10 AM

The following memo details the terms and conditions of the donation ("Donation") from the anonymous donor ("Donor") to Syringa Mountain School ("SMS").

The Donor, known to the SMS board of directors ("SMS Board") but anonymous to all others, has agreed to make a one-time donation in the amount of USD 500,000. The donation will be made by check payable to "Syringa Mountain School" or wire transfer to the bank account of SMS within thirty days of SMS receipt of their 501(3)(c) nonprofit designation by the Internal Revenue Service.

The Donation may be used at the discretion of the SMS Board but only for the following purposes:

- (1) purchase of land for the construction of a facility to house SMS,
- (2) construction of a facility to house SMS,
- (3) improvements to a leased facility to house SMS

The SMS Board agrees to provide a written detailed account of uses of the Donation to the Donor at a frequency not less than once per calendar quarter or at the request of Donor.

In the event that SMS ceases to be a going concern or the SMS Board is disbanded, any unused portion of the Donation will be returned to the Donor.

The SMS Board agrees not to divulge the identity of the Donor until such time as designated by the Donor.

August 15, 2013

Print

Page 1 of 1

Subject: Donation of furnishings
From: Woods, Ward (WOODSW@bessemer.com)
To: Syringa.Mountain.School.Board@bessemer.com;
Cc: brogers75@yahoo.com; marymgervase@yahoo.com; kate@themountainschool.info;
Date: Sunday, July 14, 2013 4:18 PM

This memo is to indicate that the board of trustees of the Mountain School is prepared to transfer to the Syringa Mountain School the furnishings and supplies used by the Mountain School in conducting its educational mission. These would include:

Desks, tables, chairs, chalk boards, farm animals, farm equipment and supplies, garden equipment and supplies, playground structures, etc.

At the time of the transfer, a detailed inventory of such furnishings and supplies would be made.

Yours Truly,
Ward W. Woods
Trustee, The Mountain School

Sent from my iPad

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<http://us-mg5.mail.yahoo.com/neo/launch?.rand=5u0f43hgnc374>

7/14/2013

August 15, 2013

STAR LAW OFFICE_{PLLC}
SELIM ARYN STAR – ATTORNEY AT LAW

219 SOUTH RIVER STREET, UNIT 202, HAILEY, IDAHO 83333
(208) 788-9232 FAX: (208) 788-9376 starlawoffice@gmail.com

July 12, 2013

Idaho State Charter Commission

RE: Syringa Mountain School

Dear Sir/Madam,

I have been contacted by Mary Gervase and the founding board and have been assisting her in the process when specific questions arise regarding the process of creating a charter school. I would be willing to continue our association through to fruition into a new charter school

I believe strongly that the Syringa Mountain School has the support of the community and will find success through the dedication and skills of the founding board, Mary Gervase and the community at large.

Respectfully,



Selim Aryn Star – Attorney At Law

Enc.

SAS:tbm

CC: Mary Gervase

August 15, 2013

Print

Page 1 of 1

Subject: charter school transportation
From: Jason Miller (jason@mountainrides.org)
To: marymgervase@yahoo.com;
Date: Monday, July 8, 2013 4:18 PM

Hi Mary-

As we discussed, Syringa Mountain School could consider buying bulk bus passes for its students. We have similar programs in place for BCSD, TCS and Sage School. This allows students to access the Valley Route bus for free during the school year. Once you have your estimated enrollment, we can put together a cost proposal for you.

Best,

Jason Miller

Mountain Rides Transportation Authority

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<http://us-mg5.mail.yahoo.com/neo/launch?.rand=5u0f43hgnc374>

7/14/2013

August 15, 2013

July 8, 2013

To Whom It May Concern,

Communities are made stronger through the collective and collaborative efforts of many individuals and organizations. We believe whole-heartedly in this concept, and therefore fully support the creation of the Syringa Mountain School in the Wood River Valley.

In working with the Syringa School, we know that we have willing partners who are focused on the development of youth in ways that will help them reach their fullest potential. Their desire to 'awaken and encourage exploration through the head, heart and hands' is complementary to the Y's mission to develop an individual's 'body, mind and spirit'.

We recognize the importance for children and families to have options when it comes to education. Each child has a unique style and learning modes that can be maximized when their education is suited more specifically to their own individual needs. Through more diversified educational approaches, we will be able to reduce the achievement gap and better address the growing needs and concerns of our community by developing thoughtful, conscientious young leaders.

The Y is looking forward to working with Syringa School on several programs including after-school and summer initiatives.

Thank you for your consideration.

Sincerely,

Jason Fry

CEO



July 8, 2013

Dear Charter Commission,

Greetings! I am the Program Coordinator for the well-established nutrition-education nonprofit, *Nurture*. We deliver monthly programming to all elementary schools in the Wood River Valley, and are expanding our programming to Gooding County this fall (2013). Additionally, we provide adult education classes and work collaboratively with many community organizations, such as The Hunger Coalition, Wood River YMCA, St. Luke's Wood River, and Higher Ground, to name few.

I am writing this letter to express our interest and intent to work with The Syringa Mountain School in upcoming school years. Positive nutritional education is part of their curriculum, so theirs will be an excellent school to work with! We will be able to take our programming to the next level with their students; integrating *Nurture's* curriculum with Syringa's garden, farm, and sustainability emphasis. I anticipate working together on a farm-to-school initiative for Syringa's school lunch/nutrition program using the federal USDA lunch program; and expanding their afterschool and summer camp offerings to include this joint nutrition emphasis.

As you can see, there is much to be excited about concerning the collaboration of Syringa Mountain School with *Nurture*! We wholeheartedly support their endeavors of becoming the first Charter School in the Wood River Valley, and look forward to working together soon. Thank you so much for your support with this process.

Sincerely,

Amy Schlatter

Nutrition Educator

Program Coordinator-Nurture

Subject: Letter of Support
From: Evelyn Johnson (ejohnson@lplearningcenter.org)
To: marymgervase@yahoo.com;
Date: Wednesday, July 10, 2013 3:31 PM

Dear Mary,

I am happy to write a letter of support for your petition for a Waldorf Charter school in Blaine County.

As a professor in the education department at Boise State University I would be interested in supporting your efforts by conducting research and program evaluation as appropriate. Additionally, as the Executive Director of Lee Pesky Learning Center, we would be interested in providing our services as needed in support of students requiring special education services.

I wish you the best of luck with your petition and please let me know if I can do anything else to support you in this effort.

Sincerely,

Dr. Evelyn Johnson
Professor and Executive Director
Boise State University
Lee Pesky Learning Center

Evelyn Johnson, EdD
Executive Director

Ph: 208-333-0008 F: 208-333-0888

[<http://lplearningcenter.org/wp-content/uploads/2013/03/EmailSigBlockforAD.jpg>]

Improving the lives of people who learn differently through prevention, evaluation, treatment, and research.

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Subject: Thank you Keith and safe travels
From: Mary Gervase (marymgervase@yahoo.com)
To: keithallred1@boisestate.edu;
Date: Monday, July 29, 2013 9:58 AM

Thanks so much Keith and I look forward to connecting at the close of your sabbatical. Warm regards and safe travels, Mary

Mary Gervase Ph.D.
Educational Consultant
208-720-6327, 208-788-9729
P.O. Box 3531 or 73 Pioneer View Drive,
Hailey, Idaho 83333 USA

----- Forwarded Message -----

From: Keith Allred <keithallred1@boisestate.edu>
To: Mary Gervase <Marymgervase@yahoo.com>
Sent: Tuesday, July 23, 2013 8:59 AM
Subject: Re: A letter of support for Syringa Mountain School please Keith?

Greetings-

Thanks for keeping in contact. I'm going into a long meeting and when I'm done I'll be heading out of state again to deal with my mother's health issues. I won't be able until next week. Thus I will use this email as a means of expressing my support for the proposed charter school.

As per our earlier discussions, I believe there is a great opportunity for graduate students in our Early Childhood Studies program to become involved in research examining issue related to various aspects of the Waldorf education model. Idaho has been a leader nationally in exploring various approaches to improving the effectiveness of public school education. In my opinion, there is value in further exploring the role of the Waldorf education model, particularly in the primary grades. While there are logistical issues to be resolved, I'm excited about the future prospects of our department collaborating with the charter school you are proposing.
Keith Allred

Keith W. Allred, Ph.D.
Associate Prof. & Chair
Dept. of Special Education & ECS
(208) 426-1548
keithallred1@boisestate.edu

Subject: Re: Is the Common Core alignment with Waldorf curriculum completed Will and Stephanie?
From: Mary Gervase (marymgervase@yahoo.com)
To: s.schantz.skinner@gmail.com;
Cc: svea@themountainschool.info; brogers75@yahoo.com; mrtwscott@gmail.com; joyleespencher@gmail.com; pipilaro@earthlink.net;
Date: Friday, April 5, 2013 11:26 AM

Oh my gosh Stephanie! You rock and roll!!!! Thank you so very much!!!! I will keep you posted on our work. With much gratitude, Mary

Mary Gervase Ph.D.
Educational Consultant
208-720-6327, 208-788-9729
P.O. Box 3531 or 73 Pioneer View Drive,
Hailey, Idaho 83333 USA

From: Stephanie Skinner <s.schantz.skinner@gmail.com>
To: Mary Gervase <Marymgervase@yahoo.com>
Cc: Will Stapp <wrstapp@gmail.com>; Svea Grover <svea@themountainschool.info>
Sent: Friday, April 5, 2013 9:53 AM
Subject: Re: Is the Common Core alignment with Waldorf curriculum completed Will and Stephanie?

Dear Mary,

It was great to speak with you yesterday and hear about the progress of your community's work and school. Attached are the resources I have now that can assist with your immediate needs in terms of curriculum and standards development.

You'll find here:

- * CA Standards and Waldorf Alignment
- * PA Common Core and Waldorf Alignment work, as a sample from a school that was granted its charter on the third round of hearings.
- * And, Waldorf Standards, which can help you navigate the curriculum terrain.

If I come across more, I will share it with you. There will be an update in the next issue of Confluence regarding the status of the Common Core-Waldorf Alignment project.

Best,
Stephanie

On Sun, Mar 31, 2013 at 8:30 AM, Mary Gervase <marymgervase@yahoo.com> wrote:
Dear Will and Stephanie,

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Engendering Happiness in the World.

July 14, 2013

To Whom It May Concern:

As a member of an organization that is dedicated to promoting mental balance and compassion in our community, it brings me great joy to write this letter on behalf of the Syringa Mountain School.

In 2012, there were seven mass shootings in the United States, 10-15% of teens and children in the United States were believed to be suffering from depression, and the United States had the highest incarceration rate in the world. Although there are a myriad factors leading to each of these problems, education clearly has a role to play in providing viable solutions. As Nelson Mandela said, "Education is the most powerful weapon which you can use to change the world."

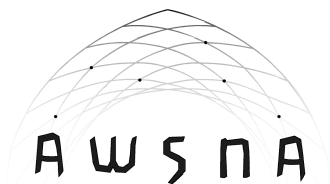
I believe the Syringa Mountain School offers a key to many of the aforementioned societal challenges by holding the highest standard in nurturing the intellect, imagination, and emotional life of each child. As a partner of the Blaine County School District, the Flourish Foundation is thrilled to expand programming into the Syringa Mountain School supporting both students and teachers with methods that minimize stress and elicit pro-social behaviors. It is clear that such programming will be mutually beneficial as the Syringa Mountain School offers in-depth knowledge of child development and multiple intelligences that will inevitably enrich our own pedagogical understanding.

On behalf of my entire organization, I hope you will provide the Syringa Mountain School the opportunity to flourish as a statewide leader of innovative education!

Warm wishes,

Ryan Redman
Executive Director
Flourish Foundation
www.flourishfoundation.org

August 15, 2013



On May 25th and 26th in San Francisco, representatives of the Charter Alliance and the Association of Waldorf Schools of North America (AWSNA) met to discuss further how a collaborative way of working can be forged and maintained between the two organizations. Elan Leibner was present as chair of the Pedagogical Section and retired Judge Wayne Brazil from JAMS mediated our meeting as he had done in September, 2012. Significant progress was made and collegiality affirmed. All committed to pursuing a formal agreement protecting the meaning of Waldorf Education together. It is the group's desire to have such an agreement completed and ratified by early next year.

Waldorf educators in North America, whether they work in independent or in public schools, hold Rudolf Steiner's goal for education to be eloquently expressed in this quote:

"Our highest endeavor must be to develop free human beings who are able of themselves to impart purpose and meaning to their lives. The need for imagination, a sense of truth, and a feeling of responsibility - these three forces are the very nerve of education."

The core principles that guide the implementation of this intention were articulated by the Pedagogical Section Council of North America in a document titled "Core Principles of Waldorf Education." Both AWSNA and the Alliance for Public Waldorf Education embrace these Core Principles as an expression of their ideal practices.

The two organizations have also articulated the key opportunities and challenges that each faces in implementing these principles.

Independent Waldorf schools offer to children entrusted to their care an educational environment devoted to the ideals articulated by Rudolf Steiner, free to choose its orientation to external pressures and controls regarding organizational structure and curriculum. Their independence allows these schools wide liberties in pursuing potential innovations both in the classroom and organizationally. However, the high price of independence in education in our culture makes it impossible for all who wish to come to an independent Waldorf school to be able to afford it. This is often heartbreaking to an independent Waldorf school community that would wish for all children who yearn for a Waldorf education to have it.

This heartbreak and the need for greater access led pioneering Waldorf educators and dedicated parents to pursue tuition-free options via public charter and district magnet schools offering the Waldorf curriculum. Carrying the idealism inspired by Steiner's pedagogical vision into the public sector, while attempting to balance the significant time, money and energy required to creatively address government mandates, these efforts have accomplished much while at the same time respecting tenets necessary for work in the public sector. Additionally, within this effort lives a desire to see public Waldorf schools serve as models of enlivened public education.

In all of Waldorf Education lives the hope of providing new ideas for cultural and educational renewal in our communities.

AWSNA Representatives

Eric Emanuel
Frances Kane
Patrice Maynard
Melanie Reiser

Alliance Representatives

Chris Hecht
Bonnie River
Rainbow Rosenbloom
Betty Staley
Will Stapp

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APPENDIX F Budget Assumptions and Supporting Documents

Idaho Public Charter School Commission Charter Petition: Budget Assumptions

School Name: Syringa Mountain School

Revenue

Explanations Related to Key Revenue Line Items (required)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Line Item	Amount	Amount	Amount	Assumptions / Details / Sources
State Support	\$484,833	\$611,627	\$617,520	Enrollment/Support Units: 120/6.59; 165/8.55; 190/8.65
State Charter Funding	13,680	18,810	21,660	Idaho Charter School Law Improvement Act; (H206, H221); \$114/student
Fundraising	50,000	50,000	50,000	TMS currently raises \$30,000 per year with enrollment of 40
REVENUE TOTALS	\$548,513	\$680,437	\$689,180	

Expenses by Category & Budget

Staffing (required)

[Please insert rows as needed]

CERTIFIED STAFF	WORST CASE BUDGET		LIKELY BUDGET		BEST CASE BUDGET		
Classroom Teachers	FTE	Amount	FTE	Amount	FTE	Amount	Assumptions / Details / Sources
Teachers	5.5	\$192,500	6.0	\$210,000	6.0	\$210,000	
Classroom Teacher Subtotals	5.5	\$192,500	6.0	\$210,000	6.0	\$210,000	Average Classroom Size: 20; 25; 30
Special Education	FTE	Amount	FTE	Amount	FTE	Amount	Assumptions / Details / Sources
Special Education Teachers	0.5	\$17,500	0.5	\$17,500	0.5	\$17,500	
Special Education Subtotals	0.5	\$17,500	0.5	\$17,500	0.5	\$17,500	Anticipated % Special Education Students: 5%
Other Certified Staff	FTE	Amount	FTE	Amount	FTE	Amount	Assumptions / Details / Sources
Administrator	1.0	\$45,000	1.0	\$45,000	1.0	\$45,000	

August 15, 2013

Other Certified Staff Subtotals	1.0	\$45,000	1.0	\$45,000	1.0	\$45,000	
CERTIFIED STAFF TOTALS							

CLASSIFIED STAFF	WORST CASE BUDGET		LIKELY BUDGET		BEST CASE BUDGET		
Position	FTE	Amount	FTE	Amount	FTE	Amount	Assumptions / Details / Sources
Instructional Aids	0.5	\$15,000	1.0	\$30,000	1.0	\$30,000	
Office Staff	1.0	\$25,000	1.0	\$25,000	1.0	\$25,000	
Maintenance/Other	0.5	\$12,000	0.5	\$12,000	0.5	\$12,000	
CLASSIFIED STAFF TOTALS	2.0	\$52,500	2.0	\$67,500	2.0	\$67,500	

BENEFITS	WORST CASE BUDGET		LIKELY BUDGET		BEST CASE BUDGET		
Position	Rate	Amount	Rate	Amount	Rate	Amount	Assumptions / Details / Sources
Retirement/PERSI	11.6%	\$35,670	11.6%	\$39,440	11.6%	\$39,440	as per American Heritage Charter School
Health/Life Insurance	12.0%	\$36,900	12.0%	\$40,800	12.0%	\$40,800	as per American Heritage Charter School
Payroll Taxes	8.0%	\$24,600	8.0%	\$27,200	8.0%	\$27,200	as per American Heritage Charter School
Workers Comp/Unemployment	0.4%	\$1,230	0.4%	\$1,360	0.4%	\$1,360	as per American Heritage Charter School
BENEFIT TOTALS	32.0%	\$98,400	32.0%	\$108,800	32.0%	\$108,800	

Board of Directors (required)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Assumptions / Details / Sources
Board Training	\$2,000	\$2,000	\$2,000	
BOARD TOTALS	\$2,000	\$2,000	\$2,000	

Educational Program / Curriculum (required)

[Please insert rows as needed]

WORST CASE	LIKELY	BEST CASE
-------------------	---------------	------------------

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	BUDGET	BUDGET	BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
Textbooks	\$3,000	\$4,125	\$4,750	\$25 per student
Supplies	\$12,000	\$16,500	\$19,000	\$100 per student
Professional Development	\$16,000	\$16,000	\$16,000	
EDUC PROGRAM TOTALS	\$31,000	\$36,625	\$39,750	

Technology (required)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
Mobile Computer Lab	\$7,120	\$8,860	\$10,600	In Pre-Opening Budget. 1 Laser Printer @ \$160; 1 Netbook for each student in a single class @ \$348
Computer Hardware	\$9,610	\$9,610	\$9,610	In Pre-Opening Budget. 2 Computers with software @ \$2,500; 1 Networked Laser Printer @ \$500; 2 Cisco telephones @ \$169; 1 Wireless Access Point @ \$129; 1 Router @ \$859; 1 Netbook for each teacher, admin, and office staff @ \$348
IT Consulting	\$1,000	\$1,000	\$1,000	In Pre-Opening Budget.
Telephone & Internet	\$6,696	\$6,696	\$6,696	As per Verizon, \$470 per month for 8 Smartphones; \$65 per month for Internet service; \$23 per month for 1 land line
TECHNOLOGY TOTALS	\$24,426	\$26,166	\$27,906	

Utilities (required if not provided w/ facilities information)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
UTILITIES TOTALS				

Facilities Details (required if not provided w/ facilities information)

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[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
UTILITIES TOTALS				

Furnishings (optional)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
Furnishings & Equipment	\$52,238	\$69,316	\$78,803	In Pre-Opening Budget. A detailed analysis is provided below.
FURNISHINGS TOTALS	\$52,238	\$69,316	\$78,803	

Transportation (optional)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
				We do not anticipate offering transportation services.
TRANSPORTATION TOTALS				

Other Expenses (optional)

[Please insert rows as needed]

	WORST CASE BUDGET	LIKELY BUDGET	BEST CASE BUDGET	
Item	Amount	Amount	Amount	Comments / Assumptions / Sources
Audits	\$5,500	\$5,500	\$5,500	As per SAGE International School
Advertising & Marketing	\$2,000	\$2,000	\$2,000	

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Liability & Property Insurance	\$8,000	\$8,000	\$8,000	As per TMS
Accounting Services	\$12,000	\$12,000	\$12,000	As per TMS
Legal Fees	\$5,000	\$5,000	\$5,000	As per SAGE International School
Travel	\$1,000	\$1,000	\$1,000	
Postage	\$500	\$500	\$500	
Membership Dues	\$2,000	\$2,000	\$2,000	
Miscellaneous	\$1,000	\$1,000	\$1,000	
OTHER EXPENSES TOTALS	\$37,000	\$37,000	\$37,000	

Narrative

Unless otherwise stated, all estimates are for the Likely Scenario in Year 1. Exceptions are Furnishings & Equipment and most Technology line items, all of which will be acquired during the Pre-Opening period.

Facilities Details and Utilities are detailed in the Facility Details template.

Income Items:

Below is the Salary Based Apportionment Data Element worksheet:

Required Data Elements for Calculating Salary Based Apportionment
Include only staff paid from General Fund Money (code 10)
For Budgeting Purposes 2013-2014

Charter Number	
Charter Name	Syringa Mountain School
Charter February Support Units	8.55
Separate Secondary School Allowance	N/A
Charter Staff Index - Administration	2.01260
Charter Staff Index - Instructional	1.06045
Actual FTE - Administration	1.00000
Actual FTE - Instructional	6.50000
Actual FTE - Noncertified	2.50000
Actual Total Salary - Administration	\$45,000
Actual Total Salary - Instructional	\$227,500
Actual Total Salary - Noncertified	\$67,500
Minimum adj to \$31,000	\$43,324

- **State Transportation:** We do not anticipate offering transportation services.
- **Lunch:** We do not anticipate offering lunch services.
- **Grants:** We anticipate receiving two grants during the Pre-Opening period. The Albertson's grant of \$250,000 and a private donation of \$500,000. Both are included in the Pre-Opening Budget, in which we detail how these grants will be used.

Expense Items:

- **Salaries:** There will be a total of 6.50 instructors to accommodate 7 classrooms.
- **Benefits:** All benefits are based on the program utilized by American Heritage Charter School.
- **Student Technology:** Given the minimal use of technology in the Waldorf philosophy, we anticipate providing technology primarily to accommodate standardized testing. During the Pre-Opening period, we will establish a Mobile Computer Lab capable of accommodating simultaneous use by all students in a single class. Each additional year over the first three years, we will increase capacity of the Mobile Computer Lab by one class.

Student Technology (Likely Scenario, Pre-Open)

Item	Qty	Unit	Total
Netbook	25	348	8,700
Laser Printer	1	160	160
TOTAL		\$	8,860

- **Furnishings & Equipment:** we will acquire the following furnishings & equipment during the Pre-Opening period. Acquisitions will continue in subsequent years to accommodate increased enrollment.

Furnishings & Equipment (Likely Scenario, Pre-Open)

Item	Qty	Unit	Total
2-drawer filing cabinet	2	189.88	380
3-hole punch	2	15.29	31
American Flag	7	8.3	58
Bookshelves	9	69.99	630
Bulletin board	8	111.77	894
Cabinet	8	319.95	2,560
Calculators	2	3.99	8
Chairs - student	145	120	17,400
Chalk Board	16	145	2,320
Emergency Folder Wall Holder	8	9.79	78
Extension Cord	3	5.79	17
First Aid Kit	8	29.49	236
Globes	3	64.95	195
Mail Box (Set)	1	232	232
Pencil Sharpener	8	31.99	256
Portable XGA Projector	1	564.99	565
Power Strip	3	7.99	24
Projector	1	399.99	400
Pull Down Screen	1	71.99	72
Scissors	8	2.99	24
Staple Remover	3	2.99	9

Stapler	3	8.99	27
Stapler - Heavy Duty	2	14.29	29
Student Desk	145	225	32,625
Tables - Activity	6	78.8	473
Tape Dispenser	3	3.99	12
Teacher chair	8	65.88	527
Teacher desk	8	331.7	2,654
Trash can (6.8 gal)	8	34.99	280
Sub-Total		\$	63,014.18
Shipping costs	10%	\$	6,301.42
TOTAL		\$	69,315.60

- **Computer Hardware:** we will acquire the following computer hardware during the Pre-Opening period. Acquisitions will continue in subsequent years to accommodate increased staff.

Computer Hardware (Likely Scenario, Pre-Open)

Item	Qty	Unit	Total
Desktop Computer & Software	2	2,500.00	5,000
Networked Laser Printer	1	500.00	500
IP Phone, Cisco SPA504G	2	169.00	338
Wireless AP, Linksys WAP54G	1	129.00	129
Router, SonicWall TZ215	1	859.00	859
Netbook	8	348.00	2,784
TOTAL		\$	9,610

- **Licensing & Software:**

Licensing & Software (Likely Scenario, Year 1)

Item	Qty	Unit	Total	Notes
2M Data Systems				
One-Time Fee			3,200	
Support Agreement			450	
Updated Fees				
OpenSIS				
Idaho State Reporting (One-Time)			1,000	
Setup & Configuration			500	
Licensing			2,388	
Testing Software				
Per Student Fee	75	5.00	375	3rd Grade+
Mileposts Software				
Per Student Fee	165	5.00	825	
TOTAL		\$	8,738	

- **Telephone & Internet:**

Telephone & Internet (Likely Scenario, Pre-Open)

Item	Qty	Unit	Total	Notes
Verizon Wireless				
8 Smartphones w/ 20GB sharing			5,640	

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Each Additional Smartphone	0	40.00	-
Cox Communications			
Internet Service	1.0	\$ 65.00	780
Landline	1.0	\$ 23.00	276
TOTAL			\$ 6,696

List of Attachments

Attachments

[Please insert rows as needed. List any attached documents related to the costs described above.]

Attachment Title	Brief Description	Notes or Considerations

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APPENDIX G Pre-Opening Budget

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Syringa Mountain School Pre-Opening Budget (Worst Scenario)

Revenues:	
State Apportionment	\$ -
State Charter Funding	-
State Transportation	-
Nutrition Reimbursement	-
Albertson's Grant	250,000
Donations/Grants	500,000
Total Revenues	750,000
Expenses:	
<u>Salaries</u>	
Teachers	-
Special Education	-
Administration	20,000
Instructional Aids	-
Office Staff	5,000
Business Manager	-
Maintenance/Other	-
Total Salaries	25,000
<u>Benefits</u>	
Retirement/PERSI	2,900
Health/Life Insurance	3,000
Payroll Taxes	2,000
Workers Comp/Unemployrn	100
Total Benefits	8,000
<u>Operating Expenses</u>	
Textbooks	-
Student Technology	7,120
Supplies	-
Furniture & Equipment	37,884
Computer Hardware	9,610
Audits	-
Licensing & Software	-
Advertising & Marketing	2,000
Gas and/or Electric	-
Telephone & Internet	-
Liability & Property Insuran	-
Board Training	1,000
Professional Development	16,000
Membership Dues	2,000
IT Consulting	1,000
Legal Fees	5,000
Travel	-
Postage	-
Building Costs	496,026
Miscellaneous	800
Total Operating Expenses	578,440
<u>Program Expenses</u>	
Nutrition	-
Transportation	-
Sepcial Education	-
Total Program Expenses	-
Total Expenses	611,440
Beginning Balance	-
Ending Balance	138,560

Syringa Mountain School Pre-Opening Budget (Likely Scenario)

Revenues:	
State Apportionment	\$ -
State Charter Funding	-
State Transportation	-
Nutrition Reimbursement	-
Albertson's Grant	250,000
Donations/Grants	500,000
Total Revenues	750,000
Expenses:	
<u>Salaries</u>	
Teachers	-
Special Education	-
Administration	20,000
Instructional Aids	-
Office Staff	5,000
Business Manager	-
Maintenance/Other	-
Total Salaries	25,000
<u>Benefits</u>	
Retirement/PERSI	2,900
Health/Life Insurance	3,000
Payroll Taxes	2,000
Workers Comp/Unemployrn	100
Total Benefits	8,000
<u>Operating Expenses</u>	
Textbooks	-
Student Technology	8,860
Supplies	-
Furniture & Equipment	54,962
Computer Hardware	9,610
Audits	-
Licensing & Software	-
Advertising & Marketing	2,000
Gas and/or Electric	-
Telephone & Internet	-
Liability & Property Insuran	-
Board Training	1,000
Professional Development	16,000
Membership Dues	2,000
IT Consulting	1,000
Legal Fees	5,000
Travel	-
Postage	-
Building Costs	502,371
Miscellaneous	800
Total Operating Expenses	603,603
<u>Program Expenses</u>	
Nutrition	-
Transportation	-
Sepcial Education	-
Total Program Expenses	-
Total Expenses	636,603
Beginning Balance	-
Ending Balance	113,397

Syringa Mountain School Pre-Opening Budget (Best Scenario)

Revenues:	
State Apportionment	\$ -
State Charter Funding	-
State Transportation	-
Nutrition Reimbursement	-
Albertson's Grant	250,000
Donations/Grants	500,000
Total Revenues	750,000
Expenses:	
<u>Salaries</u>	
Teachers	-
Special Education	-
Administration	20,000
Instructional Aids	-
Office Staff	5,000
Business Manager	-
Maintenance/Other	-
Total Salaries	25,000
<u>Benefits</u>	
Retirement/PERSI	2,900
Health/Life Insurance	3,000
Payroll Taxes	2,000
Workers Comp/Unemployrn	100
Total Benefits	8,000
<u>Operating Expenses</u>	
Textbooks	-
Student Technology	10,600
Supplies	-
Furniture & Equipment	64,449
Computer Hardware	9,610
Audits	-
Licensing & Software	-
Advertising & Marketing	2,000
Gas and/or Electric	-
Telephone & Internet	-
Liability & Property Insuran	-
Board Training	1,000
Professional Development	16,000
Membership Dues	2,000
IT Consulting	1,000
Legal Fees	5,000
Travel	-
Postage	-
Building Costs	505,896
Miscellaneous	800
Total Operating Expenses	618,355
<u>Program Expenses</u>	
Nutrition	-
Transportation	-
Sepcial Education	-
Total Program Expenses	-
Total Expenses	651,355
Beginning Balance	-
Ending Balance	98,645

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APPENDIX H Three Year Operating Budget

Syringa Mountain School Budget - Likely Scenario	Year 1			Year 2			Year 3		
	Students	#Classes	Total	Students	#Classes	Total	Students	#Classes	Total
Enrollment:									
Kindegarten	20.0	2	40	20.0	2	40	20.0	2	40
1st Grade	25.0	1	25	25.0	2	50	25.0	2	50
2nd Grade	25.0	1	25	25.0	1	25	25.0	2	50
3rd Grade	25.0	1	25	25.0	1	25	25.0	1	25
4th Grade	25.0	1	25	25.0	1	25	25.0	1	25
5th Grade	25.0	1	25	25.0	1	25	25.0	1	25
6th Grade	-	-	-	25.0	1	25	25.0	1	25
7th Grade	-	-	-	-	-	-	25.0	1	25
8th Grade	-	-	-	-	-	-	-	-	-
Total Enrollment		7	165		9	215		11	265
	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)
Revenues:									
State Apportionment	8.55		\$ 611,627	10.07		\$ 733,183	12.73		\$ 915,249
State Charter Funding	165.0	\$ 114	18,810	215.0	\$ 114	24,510	265.0	\$ 114	30,210
Donations/Grants			50,000			50,000			50,000
Total Revenues			680,437			807,693			995,459
Expenses:									
<u>Salaries</u>									
Teachers	6.0	\$ 35,000	210,000	8.0	\$ 35,000	280,000	10.0	\$ 35,000	350,000
Special Education	0.5	\$ 35,000	17,500	1.0	\$ 35,000	35,000	1.0	\$ 35,000	35,000
Administration	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000
Instructional Aids	1.0	\$ 30,000	30,000	1.0	\$ 30,000	30,000	1.0	\$ 30,000	30,000
Office Staff	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000
Maintenance/Other	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500
Total Salaries	10.0		340,000	12.5		427,500	14.5		497,500
<u>Benefits</u>									
Retirement/PERSI		11.60%	39,440		11.60%	49,590		11.60%	57,710
Health/Life Insurance		12.00%	40,800		12.00%	51,300		12.00%	59,700
Payroll Taxes		8.00%	27,200		8.00%	34,200		8.00%	39,800
Workers Comp/Unemployment		0.40%	1,360		0.40%	1,710		0.40%	1,990
Total Benefits		32.00%	108,800		32.00%	136,800		32.00%	159,200
<u>Operating Expenses</u>									
Textbooks	165.0	\$ 25	4,125	215.0	\$ 25	5,375	265.0	\$ 25	6,625
Student Technology			-			8,700			8,700
Supplies	165.0	\$ 100	16,500	215.0	\$ 100	21,500	265.0	\$ 100	26,500
Furniture & Equipment			-			23,383			24,084
Computer Hardware			-			696			696
Audits			5,500			5,500			5,500
Licensing & Software			8,738			5,253			5,628
Advertising & Marketing			2,000			2,000			2,000
Gas and/or Electric	4,320.0	\$ 0.30	1,296	5,760.0	\$ 0.30	1,728	7,200.0	\$ 0.30	2,160
Telephone & Internet			6,696			7,656			8,616
Liability & Property Insurance			8,000			8,000			8,000
Board Training			2,000			2,000			2,000
Professional Development			16,000			16,000			16,000
Membership Dues			2,000			2,000			2,000
Accounting Fees			12,000			12,000			12,000
Legal Fees			5,000			5,000			5,000
Travel			1,000			1,000			1,000
Postage			500			500			500
Building Costs			113,863			141,499			169,135
Miscellaneous			1,000			1,000			1,000
Total Operating Expenses			206,218			270,790			307,144
Total Expenses			655,018			835,090			963,844
Beginning Balance			113,397			138,816			111,420
Ending Balance			138,816			111,420			143,035

Syringa Mountain School Budget - Worst Scenario	Year 1			Year 2			Year 3		
	Students	#Classes	Total	Students	#Classes	Total	Students	#Classes	Total
Enrollment:									
Kindegarten	20.0	1	20	20.0	1	20	20.0	1	20
1st Grade	20.0	1	20	20.0	1	20	20.0	1	20
2nd Grade	20.0	1	20	20.0	1	20	20.0	1	20
3rd Grade	20.0	1	20	20.0	1	20	20.0	1	20
4th Grade	20.0	1	20	20.0	1	20	20.0	1	20
5th Grade	20.0	1	20	20.0	1	20	20.0	1	20
6th Grade	-	-	-	20.0	1	20	20.0	1	20
7th Grade	-	-	-	-	-	-	20.0	1	20
8th Grade	-	-	-	-	-	-	-	-	-
Total Enrollment		6	120		7	140		8	160
	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)
Revenues:									
State Apportionment	6.59		\$ 484,833	7.95		\$ 579,812	9.44		\$ 680,277
State Charter Funding	120.0	\$ 114	13,680	140.0	\$ 114	15,960	160.0	\$ 114	18,240
Donations/Grants			50,000			50,000			50,000
Total Revenues			548,513			645,772			748,517
Expenses:									
<u>Salaries</u>									
Teachers	5.5	\$ 35,000	192,500	6.5	\$ 35,000	227,500	7.5	\$ 35,000	262,500
Special Education	0.5	\$ 35,000	17,500	0.5	\$ 35,000	17,500	0.5	\$ 35,000	17,500
Administration	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000
Instructional Aids	0.5	\$ 30,000	15,000	0.5	\$ 30,000	15,000	0.5	\$ 30,000	15,000
Office Staff	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000
Maintenance/Other	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500
Total Salaries	9.0		307,500	10.0		342,500	11.0		377,500
<u>Benefits</u>									
Retirement/PERSI		11.60%	35,670		11.60%	39,730		11.60%	43,790
Health/Life Insurance		12.00%	36,900		12.00%	41,100		12.00%	45,300
Payroll Taxes		8.00%	24,600		8.00%	27,400		8.00%	30,200
Workers Comp/Unemployment		0.40%	1,230		0.40%	1,370		0.40%	1,510
Total Benefits		32.00%	98,400		32.00%	109,600		32.00%	120,800
<u>Operating Expenses</u>									
Textbooks	120.0	\$ 25	3,000	140.0	\$ 25	3,500	160.0	\$ 25	4,000
Student Technology			-			6,960			6,960
Supplies	120.0	\$ 100	12,000	140.0	\$ 100	14,000	160.0	\$ 100	16,000
Furniture & Equipment			-			10,175			10,481
Computer Hardware			-			696			696
Audits			5,500			5,500			5,500
Licensing & Software			8,438			4,778			4,978
Advertising & Marketing			2,000			2,000			2,000
Gas and/or Electric	4,320.0	\$ 0.30	1,296	5,760.0	\$ 0.30	1,728	5,760.0	\$ 0.30	1,728
Telephone & Internet			6,696			7,176			7,656
Liability & Property Insurance			8,000			8,000			8,000
Board Training			2,000			2,000			2,000
Professional Development			16,000			16,000			16,000
Membership Dues			2,000			2,000			2,000
Accounting Fees			12,000			12,000			12,000
Legal Fees			5,000			5,000			5,000
Travel			1,000			1,000			1,000
Postage			500			500			500
Building Costs			113,863			141,499			141,499
Miscellaneous			1,000			1,000			1,000
Total Operating Expenses			200,293			245,512			248,998
Total Expenses			606,193			697,612			747,298
Beginning Balance			138,560			80,880			29,039
Ending Balance			80,880			29,039			30,259

Syringa Mountain School Budget - Best Scenario	Year 1			Year 2			Year 3		
	Students	#Classes	Total	Students	#Classes	Total	Students	#Classes	Total
Enrollment:									
Kindegarten	20.0	2	40	20.0	2	40	20.0	2	40
1st Grade	30.0	1	30	30.0	2	60	30.0	2	60
2nd Grade	30.0	1	30	30.0	1	30	30.0	2	60
3rd Grade	30.0	1	30	30.0	1	30	30.0	1	30
4th Grade	30.0	1	30	30.0	1	30	30.0	1	30
5th Grade	30.0	1	30	30.0	1	30	30.0	1	30
6th Grade	-	-	-	30.0	1	30	30.0	1	30
7th Grade	-	-	-	-	-	-	30.0	1	30
8th Grade	-	-	-	-	-	-	-	-	-
Total Enrollment		7	190		9	250		11	310
	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)	Quantity	Rate	Total(\$)
Revenues:									
State Apportionment	8.65		\$ 617,520	11.26		\$ 802,796	15.07		\$ 1,051,661
State Charter Funding	190.0	\$ 114	21,660	250.0	\$ 114	28,500	310.0	\$ 114	35,340
Donations/Grants			50,000			50,000			50,000
Total Revenues			689,180			881,296			1,137,001
Expenses:									
<u>Salaries</u>									
Teachers	6.0	\$ 35,000	210,000	8.0	\$ 35,000	280,000	10.0	\$ 35,000	350,000
Special Education	0.5	\$ 35,000	17,500	1.0	\$ 35,000	35,000	1.0	\$ 35,000	35,000
Administration	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000	1.0	\$ 45,000	45,000
Instructional Aids	1.0	\$ 30,000	30,000	1.0	\$ 30,000	30,000	1.0	\$ 30,000	30,000
Office Staff	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000	1.0	\$ 25,000	25,000
Maintenance/Other	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500	0.5	\$ 25,000	12,500
Total Salaries	10.0		340,000	12.5		427,500	14.5		497,500
<u>Benefits</u>									
Retirement/PERSI		11.60%	39,440		11.60%	49,590		11.60%	57,710
Health/Life Insurance		12.00%	40,800		12.00%	51,300		12.00%	59,700
Payroll Taxes		8.00%	27,200		8.00%	34,200		8.00%	39,800
Workers Comp/Unemployment		0.40%	1,360		0.40%	1,710		0.40%	1,990
Total Benefits		32.00%	108,800		32.00%	136,800		32.00%	159,200
<u>Operating Expenses</u>									
Textbooks	190.0	\$ 25	4,750	250.0	\$ 25	6,250	310.0	\$ 25	7,750
Student Technology			-			10,440			10,440
Supplies	190.0	\$ 100	19,000	250.0	\$ 100	25,000	310.0	\$ 100	31,000
Furniture & Equipment			-			27,292			28,110
Computer Hardware			-			696			696
Audits			5,500			5,500			5,500
Licensing & Software			8,938			5,528			5,978
Advertising & Marketing			2,000			2,000			2,000
Gas and/or Electric	4,320.0	\$ 0.30	1,296	5,760.0	\$ 0.30	1,728	7,200.0	\$ 0.30	2,160
Telephone & Internet			6,696			7,656			8,616
Liability & Property Insurance			8,000			8,000			8,000
Board Training			2,000			2,000			2,000
Professional Development			16,000			16,000			16,000
Membership Dues			2,000			2,000			2,000
Accounting Fees			12,000			12,000			12,000
Legal Fees			5,000			5,000			5,000
Travel			1,000			1,000			1,000
Postage			500			500			500
Building Costs			113,863			141,499			169,135
Miscellaneous			1,000			1,000			1,000
Total Operating Expenses			209,543			281,088			318,885
Total Expenses			658,343			845,388			975,585
Beginning Balance			98,645			129,482			165,389
Ending Balance			129,482			165,389			326,805

APPENDIX I **FIRST YEAR CASH FLOW**

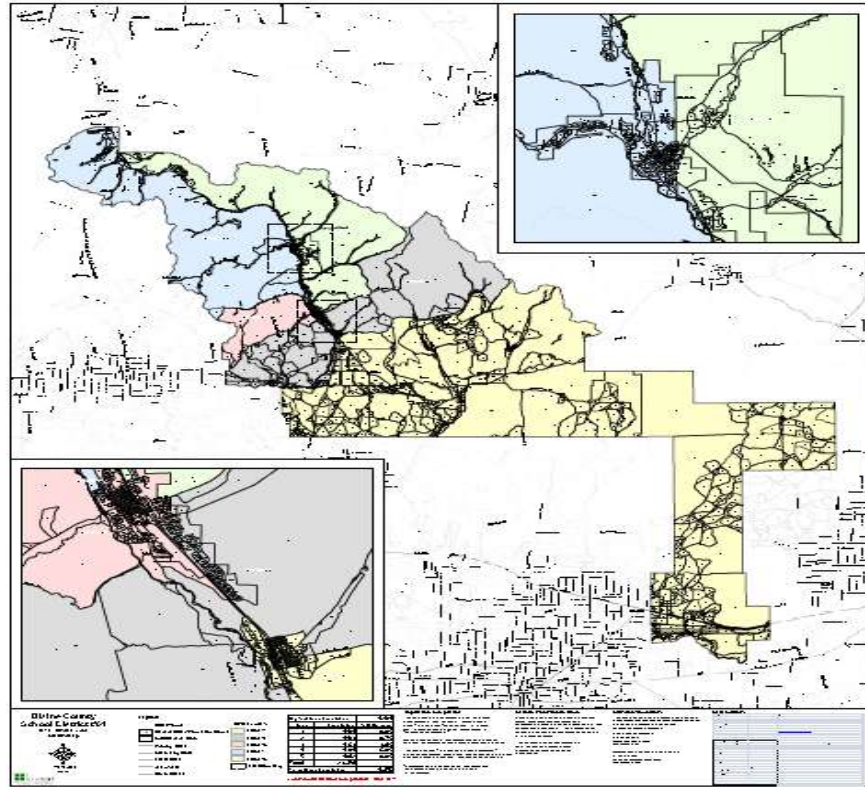
August 15, 2013

Syringa Mountain School

Cash Flow - Likely Scenario (Yr 1)

	jul	aug	sept	oct	nov	dec	jan	feb	mar	apr	may	jun	TOTAL
Revenues:													
State Apportionment	\$ 305,814		\$ 61,163		\$ 61,163		\$ 61,163		\$ 61,163		\$ 61,163		611,627
State Charter Funding	9,405		1,881		1,881		1,881		1,881		1,881		18,810
Donations/Grants			25,000								25,000		50,000
Total Revenues	315,219	-	88,044	-	63,044	-	63,044	-	63,044	-	88,044	-	680,437
Expenses:													
<u>Salaries</u>													
Teachers			21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000	21,000	210,000
Special Education			1,750	1,750	1,750	1,750	1,750	1,750	1,750	1,750	1,750	1,750	17,500
Administration	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	45,000
Instructional Aids			3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	30,000
Office Staff		2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	2,273	25,000
Maintenance/Other		1,136	1,136	1,136	1,136	1,136	1,136	1,136	1,136	1,136	1,136	1,136	12,500
Total Salaries	3,750	7,159	32,909	32,909	32,909	32,909	32,909	32,909	32,909	32,909	32,909	32,909	340,000
<u>Benefits</u>													
Retirement/PERSI	435	830	3,817	3,817	3,817	3,817	3,817	3,817	3,817	3,817	3,817	3,817	39,440
Health/Life Insurance	450	859	3,949	3,949	3,949	3,949	3,949	3,949	3,949	3,949	3,949	3,949	40,800
Payroll Taxes	300	573	2,633	2,633	2,633	2,633	2,633	2,633	2,633	2,633	2,633	2,633	27,200
Workers Comp/Unemp	15	29	132	132	132	132	132	132	132	132	132	132	1,360
Total Benefits	1,200	2,291	10,531	10,531	10,531	10,531	10,531	10,531	10,531	10,531	10,531	10,531	108,800
<u>Operating Expenses</u>													
Textbooks	4,125												4,125
Student Technology	-												-
Supplies	8,250		1,650		1,650		1,650		1,650		1,650		16,500
Furniture & Equipment	-												-
Computer Hardware	-												-
Audits												5,500	5,500
Licensing & Software	6,554		437		437		437		437		437		8,738
Advertising & Mktg	500									500	500	500	2,000
Gas and/or Electric	108	108	108	108	108	108	108	108	108	108	108	108	1,296
Telephone & Internet	558	558	558	558	558	558	558	558	558	558	558	558	6,696
Liability & Property Ins	667	667	667	667	667	667	667	667	667	667	667	667	8,000
Board Training	500	500					500				500		2,000
Professional Dev	4,800	4,800					1,600					4,800	16,000
Membership Dues	2,000												2,000
Accounting Fees	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	12,000
Legal Fees	417	417	417	417	417	417	417	417	417	417	417	417	5,000
Travel	83	83	83	83	83	83	83	83	83	83	83	83	1,000
Postage	42	42	42	42	42	42	42	42	42	42	42	42	500
Building Costs	9,489	9,489	9,489	9,489	9,489	9,489	9,489	9,489	9,489	9,489	9,489	9,489	113,863
Miscellaneous	83	83	83	83	83	83	83	83	83	83	83	83	1,000
Total Operating Expenses	39,175	17,746	14,533	12,446	14,533	12,446	16,633	12,446	14,533	12,946	15,533	23,246	206,218
Total Program Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Expenses	44,125	27,196	57,973	55,886	57,973	55,886	60,073	55,886	57,973	56,386	58,973	66,686	
Beginning Balance	107,283	378,377	351,181	381,251	325,365	330,436	274,550	277,520	221,634	226,704	170,318	199,389	
Ending Balance	378,377	351,181	381,251	325,365	330,436	274,550	277,520	221,634	226,704	170,318	199,389	132,702	

APPENDIX J Primary attendance area and neighborhood school boundaries



Map can be accessed at the BCSD Website http://www.blaineschools.org/District/Board/Zone_Map.aspx

Primary Attendance Area for Blaine County School District 61

Neighborhood School Boundaries

Bellevue Elementary

- Area south of Woodside Industrial Area, including the Chantrell Subdivision.
- Broadford Road from Broadford Road Highlands
- Areas South of Bellevue to the Lincoln County line on the South, and the Camas County line on the West
- Area West of ½ mile East of Highway 20/Gannett Road Intersection

Woodside Elementary

- Area East of Highway 75 between Woodside Industrial Area and Fox Acres Road
- Area South of Fox Acres Road from Highway 75 to Wood River High School
- Area North of Woodside Industrial Area

Hailey Elementary

- Area North of Fox Acres Road between Highway 75 and Wood River High School
- Area along Broadford Road north of Broadford Road Highlands
- Area South of Ohio Gulch Road, including Valley Club
- Area East of Camas County Line

Hemingway Elementary

- All areas North of Ohio Gulch Road within Blaine County, including Heatherlands and Starweather Subdivisions

Carey Elementary

- Areas East of ½ mile East of Highway 20/Gannett Road Intersection and within Blaine County
- Students in the Yale/Minidoka Area are excluded. Students in this area attend school in Minidoka County School District.

High School and Middle School

- Students who reside in Bellevue, Hailey, Hemingway and Woodside Elementary areas attend the Wood River Middle School and Wood River High School.
- Students who reside in the Carey Area attend Carey High School.
- Students in Minidoka/Yale area attend Minico High School.

August 15, 2013

APPENDIX K Facilities Details

Idaho Public Charter School Commission Charter Petition: Facility Details

School Name: Wood River Waldorf Methods School, Inc. DBA Syringa Mountain School	Details for (in order of preference): Option 1
Facility Name / Title: Aspen Street LLC Referred to as Odell Property	Option Status: Likely
Location Address: Aspen Street, Hailey Idaho	Primary Vendor Information (if applicable) Mark Odell, 716 Morningstar Rd, Sun Valley Idaho 208-622-9540

Narrative

This 3.04 acre vacant property in the city of Hailey, Zoned General Residential which allows for schools, meaning no other entitlement proceedings would need to occur. At 3.04 Acres this site is fully self contained and would suffice for the future needs of the school. This location fits the ideals of the Waldorf principals. It is near, 100 feet from the entrance to the Draper Preserve, a public nature conservancy owned by the Wood River Land Trust. This location provides immediate access to the riparian corridor adjacent to the Big Wood River. This site is NOT in any subdivision, and thus has no covenants conditions and restrictions. It is partially treed, and is a long rectangular parcel that provides excellent street access on a relatively quiet street.

We have discussed this option with the City Planner (Micah Austin) and he sees no impediments to this proposal and thinks this is a great site location for the school. The site location is optimal as it is only 2 blocks from Hailey main Street, and is located between two residential neighborhoods. There is sufficient onsite and street parking to accommodate the city requirements.

We are in verbal contact with the seller, whose asking price is \$750,000 (Seven Hundred and Fifty Thousand Dollars), which we are proposing to pay as the price and suggesting either a 501(c3) charitable donation for a portion of the \$750,000 and or seller financing for 50% of the price on a three-year note at 5% interest only.

For facility infrastructure we will lease three double wide mobile classrooms with Restrooms for a period of four years. Each pod is 24x60 feet (1,440 sq.ft.) and has two classrooms, and two bathrooms. 3 Pods will provide 6 total classrooms. Each pods monthly rate will be \$2,303.00 a detailed description of the modular pods from Specialty Modular is attached. A small inconsequential amount of the property is in the 100 year flood plain, less than 5 feet wide by 75 feet long along the south east portion of the property.

A capital campaign will be organized for placement of permanent structures, and the note balance, at a later date.

Fees due to the City of Hailey

Building Permits - \$4,833.00 Based on \$300,000 of Improvements

City and Water Hook Up Fees – 1.5 Inch Line -\$26,033.00

Impact Fee – \$141.00 per 165 students = \$23,265.00 *

*This fee is appealable under city code 15.16.090.01 and we will appeal it based on the fact that the students coming to the school have already been accounted for in fees previously paid by the Blaine County School District.

Draft Facility Budgets

Pre-Opening Expenses (required)

[Please insert rows as needed]

Description	Qty	Unit Cost	Total Cost	Comments
Down Payment	1	\$375,000	\$375,000	Down payment of 50% of asking price.
Mobile Classroom Installation	1	\$33,240	\$33,240	Delivery, Set-Up, Anchors, Skirting, Foundation Plan for three mobile classrooms
Mobile Classroom Site Preparation	1	\$10,000	\$10,000	
Additional Site Preparation	1	\$30,000	\$30,000	Parking lot, landscaping, etc.
Building Permits	1	\$4,833	\$4,833	Based on \$300,000 of improvements
City and Water Hook-Up Fees	1	\$26,033	\$26,033	1.5 Inch Line
Impact Fee	165	\$141	\$23,265	
TOTAL Pre-Opening Costs			\$502,371	

Operating Expenses: Year 1 & Year 2 (required)

[Please insert rows as needed]

August 15, 2013

Description	Year 1 Qty	Year 1 Unit Cost	Year 1 Total Cost	Year 2 Qty	Year 2 Unit Cost	Year 2 Total Cost	Comments
Mobile Classroom Lease	3	\$2,303	\$82,908	4	\$2,303	\$110,544	Each unit houses 2 classrooms
Debt Service (Principal & Interest)	1	\$2,580	\$30,955	1	\$2,580	\$30,955	D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL Year 1 Costs			\$113,863	TOTAL Year 2 Costs			\$141,499

Operating Expenses: Year 3 (required) & Year 4 or Future Expansion (optional)

[Please insert rows as needed]

Description	Year 3 Qty	Year 3 Unit Cost	Year 3 Total Cost	4 / Exp Qty	Year 4 or Expansion Unit Cost	Year 4 or Expansion Total Cost	Comments
Mobile Classroom Lease	5	\$2,303	\$138,180				Each unit houses 2 classrooms
Debt Service (Principal & Interest)	1	\$2,580	\$30,955				D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL Year 3 Costs			\$169,135	TOTAL Year 4 or Expansion Costs			

List of Attachments

Attachments (required)

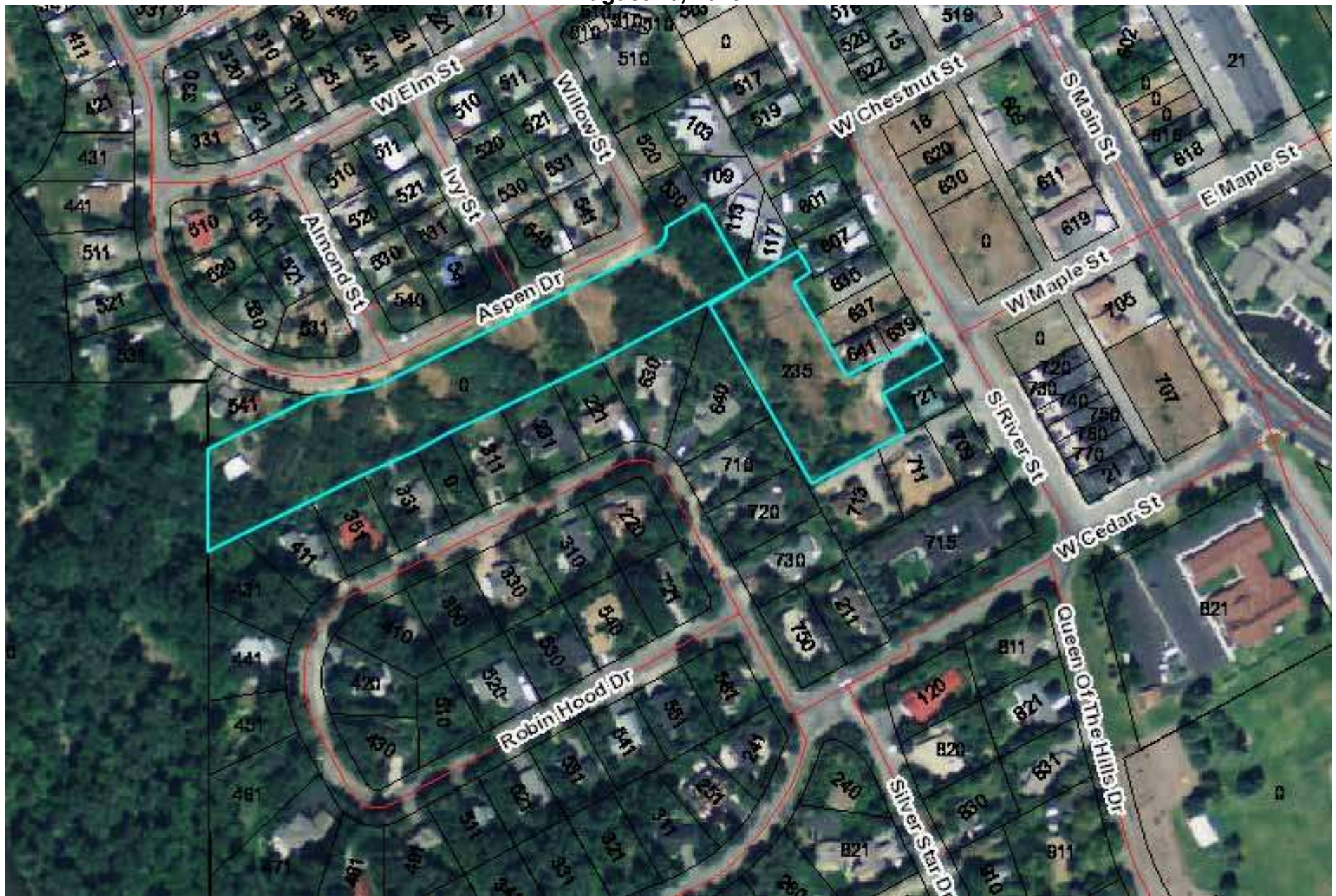
[Please insert rows as needed. List all documents related to this facility's location, costs, etc.]

Attachment Title	Brief Description	Notes or Considerations
Odell Site Plat	Aerial Plat photo of the subject property	
Specialty Modular Inc	Modular Classroom Lease and description	

August 15, 2013

County Tax and Legal Description		
LOI between parties	Letter of Intent to be attached at later date	

August 15, 2013



August 15, 2013

DocuSign Envelope ID: BC56DA29-7395-40CD-9168-8D41838AD013

LETTER OF INTENT

July 15, 2013

Monday, July 15, 2013

Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC, respectfully submits this Non-Binding Letter of Intent for the purchase of the property described below.

The general terms and conditions of this proposal are as follows:

Seller: Aspen Street LLC c/o Mark Odell

Buyer: Wood River Waldorf Methods School, Inc. DBA Syringa Mountain School (Hereinafter referred to as the "Charter School.")

Terms:

- **Property:** HAILEY FR SWSE & NWN TL 6902 SEC 9 & 16 2N 18E in Hailey Idaho, Parcel Number RPH2N180090120
- **Purchase Price** = \$750,000.00 (Seven Hundred and Fifty Thousand Dollars)
- **Earnest Money:** To be deposited into the Windermere Sun Valley LLC Trust Account five business days after conversion of this Letter of Intent into a fully executed Purchase & Sale Agreement.
- **Terms:** Buyer shall pay cash at closing for \$750,000. The source of cash purchase will be 50% down payment and 50% loan proceeds.
- **Contingency regarding Financing:** This offer is contingent on obtaining financing. Buyer will obtain bank financing with 50% down payment at the close of escrow and execute 20-year loan on the balance of the purchase from DL Evans Bank.
- **Contingency regarding Non-Profit 501-C-3 Status:** This offer is contingent upon the Buyer securing a Non-Profit 501-C-3 status with the Internal Revenue Service. The Wood River Waldorf Methods School, Inc has applied for 501-C-3 status and expects approval on or before August 15, 2013.
- **Contingency regarding Charter School Approval:** Buyer to gain approval as a Charter School from the Idaho Charter School Commission. The application will be approved or denied on or before August 15, 2013. In the event the Charter School is denied on August 15, 2013, Buyer and Seller agree to extend this contingency to the next application date of October 15, 2013.
- **Contingency regarding the Lot Lines:** Seller to identify the property corners. Approval of said property corners shall be at the sole discretion of the Buyer.
- **Contingency regarding Development Agreement:** Buyer to review and approve the Development Agreements with the City of Hailey. Approval of said Development Agreements to be at the sole discretion of the Buyer.
- **Closing:** The closing shall occur thirty calendar (30) days after a Purchase and Sale

August 15, 2013

DocuSign Envelope ID: BC56DA29-7395-40CD-9168-8D41838AD013

Agreement is fully executed by Buyer and Seller.

- **Title Company and Closing Costs:** This transaction shall be closed at a Title Company of Seller's Choosing. Seller shall pay the title insurance and the escrow fee shall be split evenly between the Buyer and the Seller.

Buyer's Representation:

The parties hereto acknowledge that the Buyer is represented by Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC. Seller shall compensate Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC a commission equal to three percent (3.0%) of Purchase Price, payable at closing.

Offer Duration:

This Letter of Intent, unless extended by the Buyer, will expire if Seller has not accepted the Letter on or before Friday, July 19, 2013 @ 5 PM, Idaho Time.

If the foregoing sets forth an agreeable basis for proceeding, Seller should sign, date, and return to the undersigned the enclosed copy of this letter.

Neither party will be bound with respect to the property until a Purchase & Sale Agreement has been executed, but both parties shall use their best efforts to reach agreement thereon.

It is expressly understood by both parties that this letter of intent is not a binding agreement between the parties, or an agreement by any party to enter into a binding agreement, but is only intended to outline the terms and conditions under which both parties would consider entering into the Purchase & Sale Agreement. Neither party may claim any legal rights against the other by reason of signing this letter of intent or by taking any action in reliance thereon.

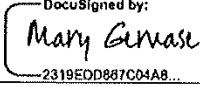
Sincerely,

Randy H. Flood
Associate Broker
Windermere Real Estate / Sun Valley LLC
Cell 208.720.0776
Office 208.788.1700 ext. 32
Fax 208.788.3756
rflood@windermere.com
<http://www.randy-flood.com>
<http://www.realsunvalleyestates.com>

Buyer's Agreement and Acceptance

August 15, 2013

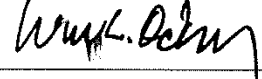
DocuSign Envelope ID: BC56DA29-7395-40CD-9168-8D41838AD013

By: 
MARY GERVASE, EXECUTIVE DIRECTOR
THE MOUNTAIN SCHOOL

Dated: 7/16/2013

Seller's Agreement and Acceptance:

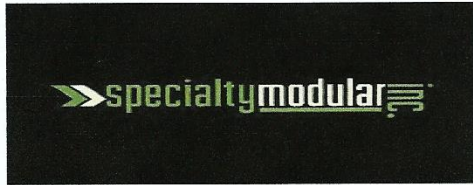
ASPEN STREET LLC

By: 

Its: MANAGING MEMBER

Dated: July 16, 2013

END OF LETTER OF INTENT



11093 W. Wagon Pass St
Boise, Idaho 83709
Phone: (208) 322-6911
Fax: (888) 546-8070

Bugetary Quotation

Customer: Syringa Mountain School Attn: Travis Scott Phone: 208-720-8784 E-mail: mrtwscott@gmail.com	Ship to: Hailey, ID
---	---------------------

June 24, 2013	Terms: Upon Invoice	Ship Via: Common Carrier
Salesman: Don Ruesch	Quotation good for 30 days, subject to availability	Date required: TBD

DESCRIPTION ITEM #1

1	New (4-5)24'x60' Double wide mobile classroom with RR's (see floorplan below)
---	---

Pricing:

1A: Operating Lease rates:

36 month 24'x60' classroom lease rate: \$2,711.00 mo ea
48 month 24'x60' classroom lease rate: \$2,303.00 mo ea

Price is for building only and does not include applicable tax, and installation charges. Buildings do have 100 lb snow load.

1A: Purchase price:

24'x60' classroom purchase price: \$108,147.00 per bldg (includes options to building below)

Options to building:

- LP siding with batts in lieu of LP siding - **Included**
- (2) Double door glass kits in lieu of Standard dr - **Included**
- (2) 12"x60" side windows off main doors- **Included**
- (1) HC Drinking fountain - **Included**
- (2) 8' Counter top with overhead shelve - **Included**

Price is for building only and does not include applicable tax, and installation charges. Buildings do have 100 lb snow load.

Installation charges (within Hailey, ID):

Delivery: \$2,400.00 per bldg
Set-up *: \$3,625.00 per bldg (additional \$800 for material if purchased)
Anchors: \$65 ea x 16 = \$1,040.00 per bldg
Corrugated Corten skirting: \$3,675.00 per bldg (includes wood frame backing; no insulation)

August 15, 2013

Engineered foundation plan for set up: \$1,020.00 (one only for all bldgs)

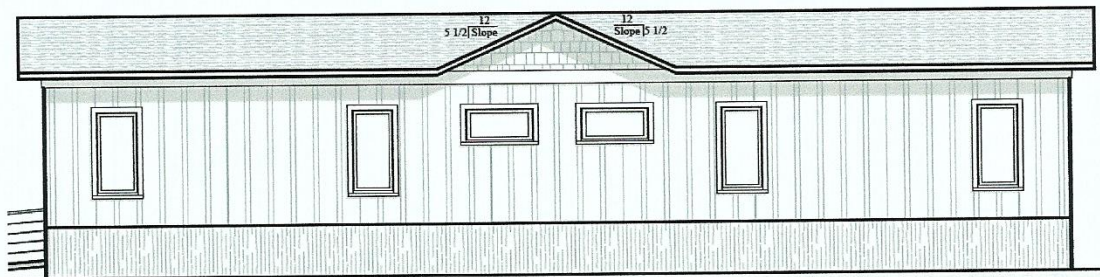
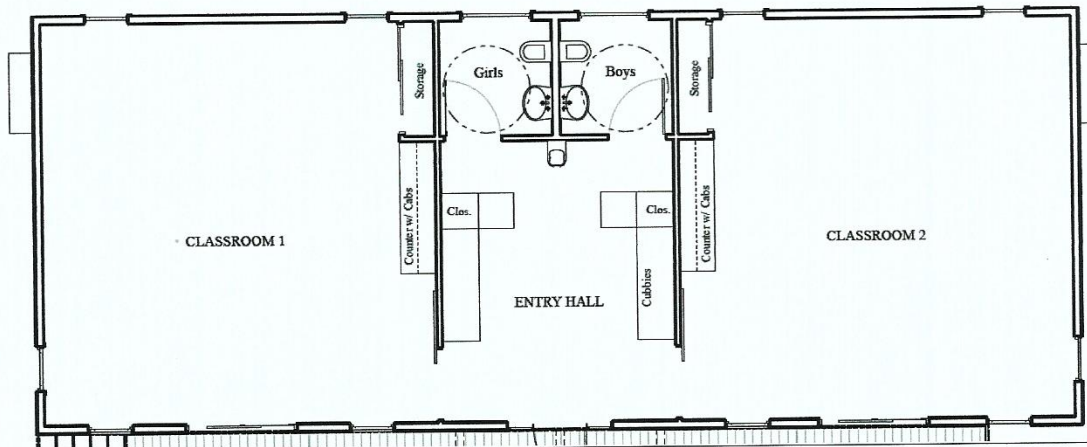
Teardown and return charges (lease only):

Current rate at time of return

Not included:

Taxes
Ramp or Deck
Insurance
Site prep work
Utilities
Cubbies
Mini-blinds
Snow clips or gutters and downspouts

Conceptual Floorplan (actual floorplan may differ slightly):



Utility Connections (provided by customer):

Electric: 225 amp, 220 volt, single phase connection to building's panel box per bldg

Plumbing: ¾ " main water hook up and 4" waste hookup

ADDITIONAL INFORMATION:

* Set-up cost based on 1500 p.s.f. soil bearing capacity.

** Optional service (may be required by local municipality). Price reflects service taken during time of building delivery.

Rates on handicap ramps assume a 30' long ramp with a 5'x5' landing. Site to be level. Customer requirements beyond those defined herein are subject to an additional charge.

Pricing is based upon others providing all permits, fees, taxes, licenses, utility connections and preparation of a level, compact and truck accessible site. The customer is solely responsible for the procurement and costs of all permits as required for the installation process of the building(s).

Unless otherwise noted, all buildings quoted herein offer a standard 100 lb roof load.

Quotation excludes all state, local and personal property taxes, fees, building permits and utility connections.

Pricing is for non-code, non-union, and non-prevailing wage.

Pricing is for a standard Modular Industry above ground, pier and pad foundation, block and level type set-up. Pricing does not include charges for tolls, escorts, local permits, and other charges required by local authorities.

Submission of an order does not constitute a guarantee of equipment availability or a commitment by Specialty Modular Inc. to provide equipment to you. All equipment rentals/sales are subject to equipment availability, credit approval, and execution of Specialty Modular Inc. lease/sale documentation. SMI does not warrant that the equipment meets any local or state code.

Quotation valid for 30 days starting from date listed herein.

TECHNICAL CLARIFICATIONS

1. This lease/sale is based on:

- a) an assumed soil bearing capacity of 1,500 psf at finished grade;
- b) no excavation, grading, landscaping or site development;
- c) a staging area located adjacent to the work site;
- d) suitable and acceptable access to the site for the module size(s) to be provided;
- e) electrical to a sub-panel(s) at the end of each module, connection by others;
- f) multiple potable water/sanitary drops through floor – heat tape/insulation, utility connections to the drops and extensions finished and installed by others;
- g) no dewatering of subsurface water;
- h) all underground obstructions, if any, within the proposed building envelope/work area to be located and marked above grade, by others;
- i) level grade (+/- 3") within the proposed building envelope;
- j) NO sprinkler system/fire alarm system – provided by others;
- k) NO computer and phone systems - jacks and conductors by others;
- l) actual module size slightly smaller than that listed herein;
- m) attached specification(s) and scope of work which form a part of this proposal
- n) placement of module(s) to be accomplished by the use of truck;
- o) unless otherwise noted, color selection(s) to be made from manufacturer's standard stock colors;
- p) no ramps, steps, stoops walks and/or canopies;
- q) HVAC certified balancing by others;
- r) wheels and axles to remain on module(s). Hitches will be removed and stored under module(s) if skirting package option is selected, otherwise hitches to remain on building;
- s) storm water management/erosion and sedimentation control by others;
- t) Any other drawings and/or tests required are to be supplied by customer;
- u) Geotechnical studies and reports and survey's are by others;

NO fire extinguishers – provided by others

Building's Specifications

- Chassis type: Steel with outrigger frame
- Number of axles: 4 per each section
- Underbelly: mobile flex material
- Floor joists: 2"x8" @ 16" OC with 2x8" LVL rim rails

- Decking: 3/4" T&G decking
- Floor insulation: R-30
- Flooring –26 oz carpeting
- Exterior walls: 2"x6" @16" OC framing
- Exterior wall insulation: R-21
- Exterior wall covering: LP Smart Panel hardboard siding w/ batts
- Exterior gable fascia: LP smart panel hard board shingle
- Exterior trim: 1"x4" and 1"x6" Prime Trim
- Interior walls: 2"x4" @16" OC framing
- Ceiling height: 7'10"
- Interior wall covering: 5/8" vinyl covered gyp
- Interior wall insulation: None
- Roof type: Pitched
- Pitch: 3/12
- Roof load: 100#
- Roof dormer: (2) in center per drawing
- Roof joisting: @ 16" OC
- Roof sheathing: 7/16" APA rated
- Roofing material: asphalt shingle
- Roof insulation: R-38
- Finished ceiling: T-Grid
- Overhangs: 12"
- Rain gutters: None
- Exterior doors: (1) 36"x80" hollow metal doors in steel jambs w/ half pane window, with locking lever, and closures. (2) 72"x80" double door with full glass kits.
- Interior doors: (2) 36"x80" Standard hollowcore door with wood jambs and privacy lock;
- Exterior windows: (4) 18"x36" with dual glaze style fixed, (10) 30"x60" vinyl frame/dual insulated sliders;
- Main electrical panels: (1) 200 amp single phase 120/240v panel
- Wiring: Romex/MC cable
- Duplex outlets: per NEC code
- Exterior lights: (3) porch lights dark sky fixtures
- Interior lights: 4'x3t tube recessed drop in fixtures
- Emergency lights: (2) per code
- Exit signs: (2) at exterior doors
- Fire Alarm: Rough in boxes only
- HVAC system: (2) 3 ton 15 kw heat
- Supply duct: Fiberglass duct in ceiling
- Return duct: In ceiling return to plenum wall
- Diffuser size: 24"x24"
- Data and communications roughins: (4)
- Water lines: PEX
- Drains: ABS
- HC rest rooms: (2)
- Water heater: (1) 8 gallon
- (1) HC drinking fountain
- (2) 8' countertops with overhead shelf

SCOPE OF WORK DELINEATIONCustomer: Syringa Mountain SchoolProject Location: Hailey, ID

- A. Syringa Mountain School
- B. Specialty Modular Inc
- C. Not Applicable

	A	B	C
1. SITE INSPECTION	X		
2. a. BID BONDS			X
b. PERFORMANCE BONDS			X
c. LABOR & MATERIAL PAYMENT BONDS			X
3. LATE PENALTIES/LIQUIDATED DAMAGES			X
4. PROPOSED WORK SCHEDULE (MANDATORY WITH LATE PENALTIES)			X
5. INSURANCE CERTIFICATES (DURING LEASE TERM)	X		
6. CORPORATE CERTIFICATION			X
7. CATALOG CUTS (AS REQUESTED & AVAILABLE)		X	
8. SAMPLES (AS REQUESTED & AVAILABLE)		X	
9. TAXES	X		
10. PERMITS A. BUILDING	X		
B. ELECTRICAL	X		
C. PLUMBING	X		
D. CERT. OF OCCUPANCY	X		
E. OTHER			X
11. ON-SITE INSURANCE	X		
12. SOIL TESTS			X
13. SHOP DRAWINGS (USED FOR MANUFACTURING)		X	
14. ENGINEERED DRAWINGS/CALCULATIONS (USED FOR APPROVALS)		X	
15. ENGINEERED FOUNDATION PLANS/DETAILS			X
16. OTHER DRAWINGS			X
17. PREPARE SITE: A. CLEARING & DEMOLITION	X		
B. GRADING	X		
C. FILLING & COMPACTING	X		
D. SITE UTILITIES TO 5 FEET	X		

A B C

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August 15, 2013

18. TRANSPORT MODULES		X	
19. INSPECT MODULES & VERIFY RECEIPT OF SHIP LOOSE MATERIAL		X	
20. PROVIDE STORAGE SPACE AND SECURITY FOR MODULES	X		
21. FOUNDATION LABOR & MATERIAL			X
22. FOOTINGS LABOR & MATERIAL			X
23. POSITION MODULES		X	
24. SET MODULES ON FOUNDATION W/TRUCK, CRANE, ETC.		X	
25. FOUNDATION CONNECTIONS (TIE DOWNS/ANCHORS)		X	
26. WATER LINE HOOK-UP	X		
27. PLUMBING MANIFOLDS	X		
28. SEWER LINE HOOK-UP	X		
29. ELECTRICAL INTERIOR INTERCONNECTS BETWEEN MODULES	X		
DISTRIBUTION SUBPANELS	X		
MAIN DISTRIBUTION PANEL	X		
TRANSFORMERS	X		
30. GUTTERS & DOWNSPOUTS LABOR & MATERIAL			X
31. SUPPLY SPECIAL EQUIPMENT (PER SPECIFICATION SHEET)			X
32. INSTALL SPECIAL EQUIPMENT (PER SPECIFICATION SHEET)			X
33. Flooring MATERIAL		X	
LABOR		X	
34. FIRE ALARMS			X
35. SPRINKLER SYSTEM			X
36. SUSPENDED CEILING A. GRID & PANEL		X	
B. LIGHTS		X	
C. DUCT DROPS		X	
37. PA SYSTEM			X
38. TELEPHONE & DATA	X		
39. SKIRTING LABOR & MATERIAL		X	
40. INSTALL INTERIOR TRIM AT FLOOR/WALLS/CEILINGS/SEAMS		X	
41. INSTALL EXTERIOR DOORS		X	
42. INSTALL INTERIOR DOORS		X	

August 15, 2013

	A	B	C
43. STEPS	X		
44. RAMPS	X		
46. DECKS			X
47. WALKWAYS			X
48. CANOPIES			X
49. INSTALL A. PAVING			X
B. CURBS			X
C. LANDSCAPE			X
50. ROOF SEAM MATERIAL		X	
SEAL		X	
GUARANTEE (1 YR)		X	
(OTHER _____)			X
51. FALSE MANSARD, FACIA, OVER HANGS LABOR & MATERIAL		X	
52. EXTERIOR LIGHTS MOUNTED ON BUILDING		X	
53. DROP AXLES			X
54. SHIP AXLES HITCHES TIRES			X
55. REMOVAL OF TRASH AND DEBRIS FROM SITE (OUR SCOPE)	X	X	
56. HVAC IABOR & MATERIAL		X	
57. WINDOW COVERING (DRAPES, BLINDS) IABOR & MATERIAL			X
58. DISMANTLING			X
59. SITE RESTORATION			X
60. UTILITY DISCONNECT & CAPPING OFF			X

Thank you for the opportunity to provide you with this quotation. Please feel free to call me with any questions that you may have at 208-322-6911.

Sincerely,

Don Ruesch

Idaho Public Charter School Commission

Charter Petition: Facility Details

School Name: Syringa Mountain School	Details for (in order of preference): Option 2
Facility Name / Title: Sprenger Grubb Property	Option Status: Likely
Location Address: 2730 & 2760 Woodside Blvd, Hailey, ID	Primary Vendor Information (if applicable) Dave Anderson, Executor, 7103 N Penncross Way, Meridian, ID, 83646

Narrative

This 3.44 acre vacant property in the city of Hailey and zoned Limited Business, which allows for schools. This means no other entitlement proceedings would need to occur. At 3.44 acres, this site is fully self contained and would suffice for the future needs of the school. This location fits the ideals of the Waldorf principals. It is near a canyon that rises to the east of Hailey, which would accommodate nature walks for the students. There are two separate parcels that we would combine and are subject to a development agreement with the City of Hailey calling for 0.94 acres to be developed as a park. In discussions with the city planner, Micah Austin, the school's farm facilities and gardens would likely suffice this development agreement so long as they were accessible to the public.

There is sufficient onsite and street parking to accommodate the city requirements.

This site is proximate to Woodside Elementary School and presents excellent transportation capabilities.

We are in verbal contact with the seller, whose asking price is \$511,000 (Five Hundred and Eleven Thousand Dollars), which we are proposing to pay as the price and the seller appears to be willing to receive 50% for down payment and carry a three-year interest-only note at 5% for \$255,500.00.

For facility infrastructure we will lease three double wide mobile classrooms for a period of four years. Each pod is 24x60 feet (1,440 sq. ft.), containing two classrooms and two bathrooms. Three pods will provide six classrooms. Each pod's monthly rate will be \$2,303.00. A detailed description from Specialty Modular is attached.

A capital campaign will be organized at a later date for placement of permanent structures and the note balance.

Fees due to the City of Hailey

Building Permits: \$4,833.00 based on \$300,000 of improvements

City and Water Hook Up Fees, 1.5 Inch Line: \$26,033.00

Impact Fee, \$141.00 per student: \$23,265.00 *

*This fee is appealable under city code 15.16.090.01 and we will appeal it based on the fact that the students coming to the school have already been accounted for in fees previously paid by the Blaine County School District.

Draft Facility Budgets

Pre-Opening Expenses (required)

[Please insert rows as needed]

Description	Qty	Unit Cost	Total Cost	Comments
Down Payment	1	\$255,500	\$255,500	Down payment of 50% of asking price.
Mobile Classroom Installation	1	\$33,240	\$33,240	Delivery, Set-Up, Anchors, Skirting, Foundation Plan for three mobile classrooms
Mobile Classroom Site Preparation	1	\$10,000	\$10,000	
Additional Site Preparation	1	\$30,000	\$30,000	Parking lot, landscaping, etc.
Building Permits	1	\$4,833	\$4,833	Based on \$300,000 of improvements
City and Water Hook-Up Fees	1	\$26,033	\$26,033	1.5 Inch Line
Impact Fee	165	\$141	\$23,265	

August 15, 2013

TOTAL Pre-Opening Costs	\$382,871
--	-----------

Operating Expenses: Year 1 & Year 2 (required)

[Please insert rows as needed]

Description	Year 1 Qty	Year 1 Unit Cost	Year 1 Total Cost	Year 2 Qty	Year 2 Unit Cost	Year 2 Total Cost	Comments
Mobile Classroom Lease	3	\$2,303	\$82,908	4	\$2,303	\$110,544	Each unit houses 2 classrooms
Debt Service (Interest Only)	1	\$1,065	\$12,775	1	\$1,065	\$12,775	Seller financing @ 5.0% with 50% down
TOTAL Year 1 Costs			\$95,683	TOTAL Year 2 Costs			\$123,319

Operating Expenses: Year 3 (required) & Year 4 or Future Expansion (optional)

[Please insert rows as needed]

Description	Year 3 Qty	Year 3 Unit Cost	Year 3 Total Cost	4 / Exp Qty	Year 4 or Expansion Unit Cost	Year 4 or Expansion Total Cost	Comments
Mobile Classroom Lease	5	\$2,303	\$138,180				Each unit houses 2 classrooms
Debt Service (Principal & Interest)	1	\$1,065	\$12,775				Seller financing @ 5.0% with 50% down
TOTAL Year 3 Costs			\$150,955	TOTAL Year 4 or Expansion Costs			

List of Attachments

Attachments (required)

[Please insert rows as needed. List all documents related to this facility's location, costs, etc.]

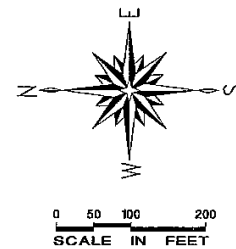
August 15, 2013

Attachment Title	Brief Description	Notes or Considerations
Sprenger Grubb Site Plat	Aerial Plat photo of the subject property	
Specialty Modular Inc	Modular Classroom Lease and description	
County Tax and Legal Description		
Liermann Email Train	Email correspondence between committee and realtor	
LOI between parties	Letter of Intent to be attached at later date	



August 15, 2013

First Amended
Woodside Subdivision Final Plat No. 15
A Resubdivision and Renumbering
of
Lots 1 - 6 and Parcel M, Block 61
Woodside Subdivision Final Plat No. 15
Located In
A Portion of SW⁴SW⁴ Section 14 &
A Portion of NW⁴NW⁴ Section 23
Township 2 North, Range 18 East,
Boise Meridian,
Blaine County, Idaho
2005



LEGEND

Subdivision Boundary Line
Blue Avoidance Line
Lot Line
Roadway Center Line
Easement Line
Set 1/2" x 24" Rebar and Cap
Set 5/8" x 30" Rebar and Cap
Found 5/8" Rebar and Cap (LS1000)

EASEMENT LEGEND

- ② 5' WIDE PUBLIC UTILITY & SNOW STORAGE EASEMENT
- ⑥ 10' WIDE PUBLIC UTILITY & SNOW STORAGE EASEMENT
- ③ 20' WIDE SEWER, WATER & PUBLIC UTILITY EASEMENT

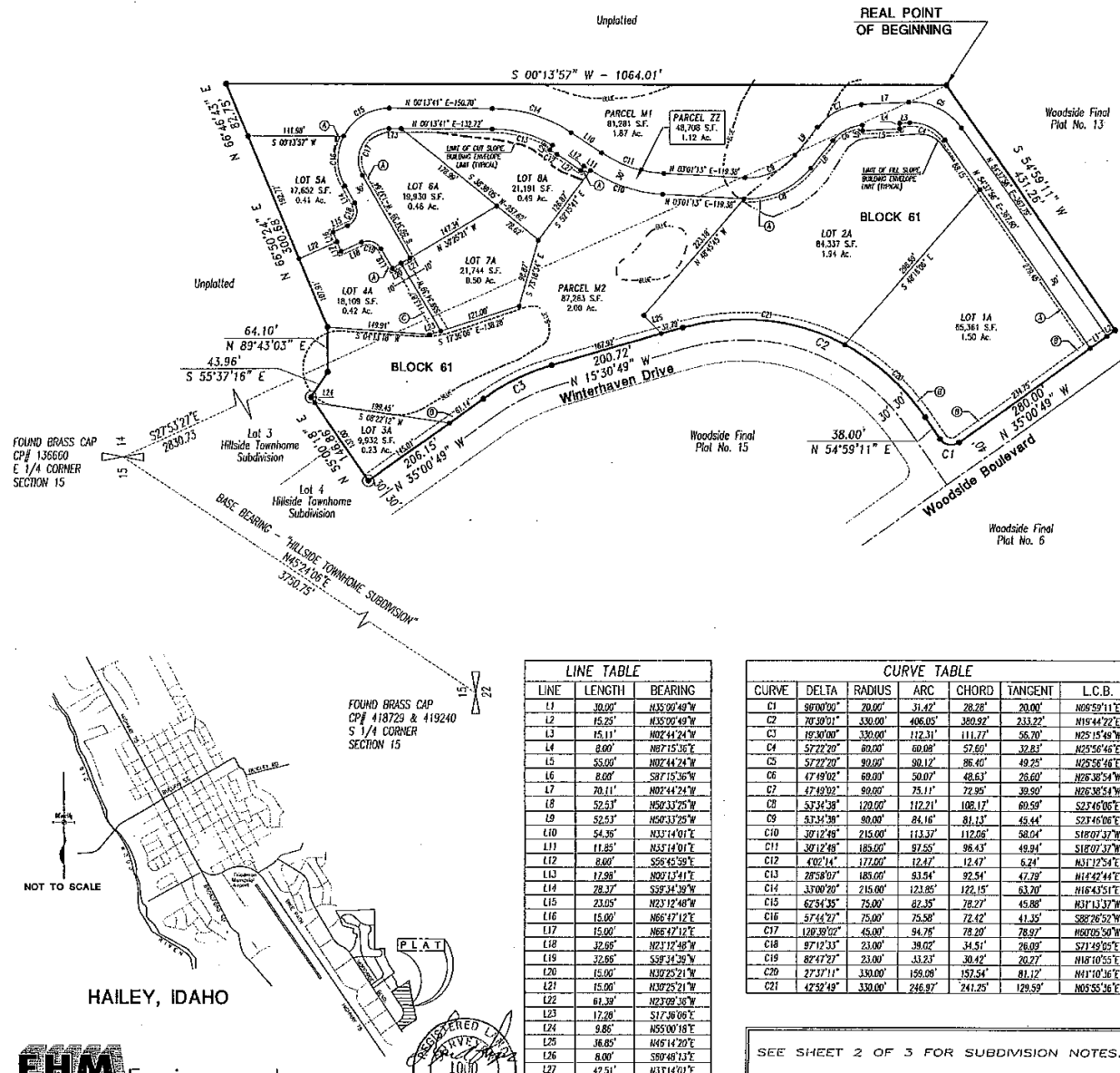
HEALTH CERTIFICATE

Sanitary restrictions as required by Idaho Code Title 50, Chapter 13, have been satisfied. Sanitary restrictions may be reimposed, in accordance with Idaho Code Title 50, Chapter 13, Section 50-1325, by the issuance of a certificate of disapproval.

5/12/05 *Robert J. ...*
Date: South Central District Health Dept., EHS

SEE SHEET 2 OF 3 FOR SUBDIVISION NOTES.

498-01FP1
SHEET 1 OF 3



August 15, 2013

First Amended Woodside Subdivision Final Plat No. 15

Certificate of Owners

This is to certify that the undersigned are the owners or representatives of the owners in fee simple of the following described property. A portion of "Woodside Subdivision Final Plat No. 15 located in a portion of SW1/4 SW1/4 Section 14, and NW1/4 NW1/4, Section 23, Township 2 North, Range 18 East, Boise Meridian, Blaine County, Idaho; being more specifically described as follows:

Commencing at the East Quarter Corner of Section 15, Township 2 North, Range 18 East, Boise Meridian. Said point lies North 45°24'06" East, 3750.75 feet from the South Quarter Corner of said Section 15. Thence South 27°53'27" East, 2830.73 feet to the Northeast Corner of Parcel M of "Woodside Subdivision Final Plat No. 13", said point also being the REAL POINT OF BEGINNING.

Thence South 54°59'11" West, 431.26 feet,

Thence North 35°00'49" West, 280.00 feet,

Thence along Curve C-1 as shown on Sheet 1 of 3,

Thence North 54°59'11" East, 38.00 feet,

Thence along Curve C-2 as shown on Sheet 1 of 3,

Thence North 15°30'49" West, 200.72 feet,

Thence along Curve C-3 as shown on Sheet 1 of 3,

Thence North 35°00'49" West, 206.15 feet,

Thence North 55°00'18" East, 146.86 feet,

Thence South 55°37'16" East, 43.96 feet,

Thence North 89°43'03" East, 64.10 feet,

Thence North 66°50'24" East, 300.58 feet,

Thence North 66°46'43" East, 82.75 feet,

Thence South 00°13'57" West, 1064.01 feet to the REAL POINT OF BEGINNING.

The area contained in this land as replatted is 10.92 acres.

It is the intention of the undersigned to and he does hereby include said land in this plat. The easements indicated on this plat are not dedicated to the public, but the rights to use said easements are hereby perpetually reserved for public utilities and such other uses designated on this plat. No structure other than for such utility and other designated public uses are to be erected within the lines of said easements.

Pursuant to Idaho Code 50-1334, we, the undersigned, as owners, do hereby state that the lots on this plat are eligible to receive water service from the City of Hailey Municipal Water System.

Pursuant to Idaho Code 31-3805, we, the undersigned, as owners, do hereby state that the irrigation water rights appurtenant to the assessment obligation of the lands in this plat have been transferred from said lands. Lots within the subdivision will not be entitled to any irrigation water rights and will not be obligated for assessments from any irrigation District and / or Canal Company.

Sprenger, Grubb & Associates, Inc., an Idaho Corporation

by: David D. Anderson, President

Acknowledgment

State of Idaho ss
County of Ada

On this 23rd day of May, 2005, at 10:AM, before me, the undersigned, a Notary Public in and for said State, personally appeared David D. Anderson, known to me to be the President of Sprenger, Grubb & Associates, an Idaho Corporation, and acknowledged to me that the corporation executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.

Nancy L. Anderson
Notary Public in and for said State
Boise
Residing at:
2-27-08
Commission Expires:



Subdivision Notes

1. BUILDING SETBACKS SHALL BE AS PROVIDED IN THE CITY OF HALEY ZONING AND SUBDIVISION REGULATION FOR GR ZONE.
2. THERE SHALL EXIST A 5' WIDE SNOW STORAGE EASEMENT ALONG BOTH SIDES OF THE PARCEL 22 IN ADDITION TO RIGHT OF WAYS HEREDIN SHOWN.
3. THE NUMBER OF LOTS ALLOWED TO ACCESS THE PRIVATE STREET WILL BE LIMITED TO 5 LOTS.
4. PARCEL 22 SHALL BE USED FOR A PRIVATE STREET FOR LOTS 4A THROUGH 8A, BLOCK 1, FIRST AMENDED WOODSIDE SUBDIVISION, FINAL PLAT 15 AND AN ACCESS, DRAINAGE, UTILITY, EMERGENCY ACCESS, PEDESTRIAN, SNOW STORAGE AND BIKE PATH EASEMENT. HOMEOWNERS OF LOTS 4A THROUGH 8A, BLOCK 1 WILL BE RESPONSIBLE FOR SNOW REMOVAL AND MAINTENANCE OF THE PRIVATE STREET PER MAINTENANCE AGREEMENT RECORDED AS INSTRUMENT NO. 522-102, RECORDS OF THE COUNTY RECORDER, BLAINE COUNTY, IDAHO.
5. NO PARKING WILL BE ALLOWED ON THE PRIVATE STREET. THE CITY SHALL HAVE THE AUTHORITY TO ENFORCE THE "NO PARKING" REQUIREMENT REFERRED TO IN THIS NOTE.
6. LOTS 4A, 5A, 6A, 7A, AND 8A WILL BE RESTRICTED TO A 30-FOOT MAXIMUM HEIGHT OF BUILDING AS DEFINED IN ARTICLE II OF THE HALEY ZONING ORDINANCE.
7. LOT OWNERS ARE ADVISED THAT FIRST AMENDED WOODSIDE SUBDIVISION FINAL PLAT NO. 15 IS LOCATED ADJACENT TO THE FRIEDMAN MEMORIAL AIRPORT IN A NOISE IMPACTED AREA THAT PRESENT AND FUTURE NOISE IMPACTS MIGHT BE ANNOYING TO THE LOT OWNERS AND MIGHT INTERFERE WITH THE UNRESTRICTED USE AND ENJOYMENT OF THE PROPERTY THAT THESE NOISE IMPACTS MIGHT CHANGE OVER TIME BY VIRTUE OF GREATER NUMBERS OF AIRCRAFT, LOUDER AIRCRAFT, SEASONAL VARIATIONS, AND TIME OF DAY VARIATIONS THAT CHANGES IN AIRPORT, AIRCRAFT AND AIR TRAFFIC CONTROL OPERATING PROCEDURES OR IN AIRPORT LAYOUT COULD RESULT IN INCREASED NOISE IMPACTS AND THAT THE LOT OWNERS OWN PERSONAL PERCEPTIONS TO THE NOISE IMPACT COULD CHANGE AND THAT THEIR SENSITIVITY TO AIRCRAFT NOISE COULD INCREASE.
8. THIS PROPERTY IS SUBJECT TO THE NOISE AND AVIATION EASEMENT AND NON-SUIT COVENANT RECORDED AS INSTRUMENT NO. 522-102 & 522-104, RECORDS OF THE COUNTY RECORDER, BLAINE COUNTY, IDAHO.
9. LOTS 4A, 5A, 6A, 7A, AND 8A ARE RESTRICTED TO SINGLE FAMILY DWELLINGS ONLY, ACCESSORY DWELLING UNITS ARE NOT ALLOWED.
10. THE INITIAL PURCHASERS OF LOTS 1A, 2A, AND 3A SHALL BE RESPONSIBLE FOR THE INSTALLATION OF A 5' WIDE CONCRETE SIDEWALK FOR THAT PORTION THAT FRONTS EACH RESPECTIVE LOT, AND BEING LOCATED ADJACENT TO WOODSIDE BOULEVARD AND WINTERHAVEN DRIVE. SPRENGER, GRUBB & ASSOCIATES SHALL BE RESPONSIBLE FOR THE INSTALLATION OF SAID SIDEWALK LOCATED ADJACENT TO PARCEL M AT THE TIME OF DEVELOPMENT OF LOT 2A OR 3A, WHICHEVER OCCURS FIRST.
11. WITHIN THE PRIVATE STREET SHOWN HEREON, EASEMENTS ARE GRANTED FOR NON-MOTORIZED PUBLIC ACCESS, FOR MOTORIZED ACCESS FOR LOTS 4A, 5A, 6A, 7A AND 8A AND THEIR GUESTS AND INVITEES, AND FOR THE MAINTENANCE AND RECONSTRUCTION OF PUBLIC UTILITIES.
12. EACH DWELLING IN LOTS 4A, 5A, 6A, 7A, AND 8A SHALL PROVIDE THREE (3) GUEST OR OVERFLOW PARKING SPACES IN ADDITION TO THE TWO (2) REQUIRED SPACES.
13. A TWENTY-FIVE FOOT (25') WIDE PLATTED COMMON LANDSCAPE PARCEL MAY BE REQUIRED WITHIN LOTS 1A AND 2A TO ELIMINATE DOUBLE FRONTAGE LOTS.
14. THE BUYERS OR THE DEVELOPERS OF LOTS 1A, 2A, AND 3A WILL BE RESPONSIBLE FOR PROVISIONS OF 1.03 ACRES OF PARK SPACE AND IMPROVEMENTS AT THE TIME OF DEVELOPMENT. SPECIFICALLY, LOT 1A IS RESPONSIBLE FOR PROVIDING 0.42 ACRES, LOT 2A IS RESPONSIBLE FOR PROVIDING 0.56 ACRES, AND LOT 3A IS RESPONSIBLE FOR PROVIDING 0.06 ACRES, OR IN-LIEU CONTRIBUTIONS FOR THESE AREAS IN ACCORDANCE WITH THE EXISTING SUBDIVISION ORDINANCE.
15. BUILDING ENVELOPES SHALL NOT EXTEND PAST THE LIMITS OF CUT AND FILL SLOPES AS DEPICTED ON SHEET 1 OF 3 OF THE FINAL PLAT OF "FIRST AMENDED WOODSIDE SUBDIVISION FINAL PLAT NO. 15".
16. PARCELS M1 AND M2 SHALL BE DEEDED TO THE CITY OF HALEY AND SHALL BE USED FOR OPEN SPACE, PUBLIC WALKING TRAILS, DRAINAGE AND PUBLIC UTILITIES, INCLUDING BUT NOT LIMITED TO, INTERMOUNTAIN GAS COMPANY, IDAHO POWER COMPANY, QWEST AND COX COMMUNICATIONS.



EFIM Engineers, Inc.
ENGINEERS/SURVEYORS/PLANNERS

498-01P2
Sheet 2 of 3

Certificate of Surveyor

This is to certify that I, Roger A. Kruger, a Professional Land Surveyor in the State of Idaho, made the survey of land as described in the Certificate of Owner's and that this plat is a true and accurate representation of said survey as made and stated under my supervision and direction.



County Engineer's Certificate

This is to certify that the undersigned, a Registered Professional Engineer in the State of Idaho has checked the foregoing plat and computations for making the same and has determined that they comply with the laws of the State of Idaho and the County of Blaine, Idaho related hereto.

Jim W. Komer 5/11/05
County Engineer

Planning and Zoning Commission Acceptance

The foregoing plat was duly accepted and approved by the City of Hailey Planning and Zoning Commission, Blaine County, Idaho, on this 21 day of November, 2005.

[Signature]
Chairman

Approval of City Council

Accepted by the City Council of Hailey, Idaho, at their meeting on the 22nd day of November, 2005.

Heather Dawson
City Clerk



City Engineer's Certificate

This is to certify that the undersigned, a Registered Professional Engineer in the State of Idaho has checked the foregoing plat and computations for making the same and has determined that they comply with the laws of the State of Idaho and ordinances of the City of Hailey.

[Signature]
City Engineer

County Treasurer's Certificate

I, Vicki L. Dick, County Treasurer in and for the County of Blaine, Idaho per the requirements of Idaho Code 50-1308, do hereby certify that all county property taxes due for the property included in this plat have been paid in full. This certification is valid for the next thirty days only.

Vicki L. Dick by Marc Peterson
County Treasurer

November 5, 2005
Date:

County Recorder's Certificate

Instrument No. _____
State of _____ } ss
County of _____

On this _____ day of _____, 200____, at _____, M., the foregoing plat was filed for record in the office of the Recorder of Blaine County, Idaho and duly recorded in plat book _____, on page _____.

Deputy

Instrument # 529597
HAILEY, BLAINE, IDAHO
2005-12-05 09:55 AM No. of Pages: 3
Recorded for: EMM ENGINEERS
MARSHA NIEMANN Fee: \$2.00
Ex-Officio Recorder Deputy [Signature]
Video PLAT

Ex-Officio Recorder



THIS MAP IS A PHOTOGRAPHIC REPRODUCTION OF THAT ON FILE IN EITHER THE RECORDERS OR SURVEYORS OFFICE. THE COMPANY ASSUMES NO LIABILITY FOR VARIATION, IF ANY, WITH ANOTHER OR RE-SURVEY.

EHM Engineers, Inc.
ENGINEERS/SURVEYORS/PLANNERS

August 15, 2013

DocuSign Envelope ID: 00AC997C-1B20-4330-99AD-1AC46ED0B627

LETTER OF INTENT

Revised July 14, 2013

July 14, 2013

This Letter of Intent replaces and supersedes the Letter of Intent dated July 12, 2013.

Sheila Liermann, Managing Broker, of Keller Williams Sun Valley Southern Idaho, respectfully submits this Non-Binding Letter of Intent for the purchase of the property described below.

The general terms and conditions of this proposal are as follows:

Seller: Sprenger, Grubb & Associates

Buyer: Wood River Waldorf Methods School, Inc. DBA Syringa Mountain School (Hereinafter referred to as the "Charter School.")

Terms:

- **Property:** Lots 1-A and 2-A, Block 61, First Amended Woodside Subdivision Final Plat No. 15
- **Purchase Price** = Five Hundred and Eleven Thousand and no/100 Dollars (\$511,000)
- **Earnest Money:** To be deposited into the Keller Williams Sun Valley Southern Idaho Trust Account five business days after conversion of this Letter of Intent into a fully executed Purchase & Sale Agreement.
- **Terms:** Buyer shall pay a 40% down payment at the close of escrow and execute Promissory Note and Deed of Trust secured by the property in the amount of 60% of the Purchase Price. The unpaid principal balance shall bear interest at the rate of five percent (5%) per annum, with monthly payments of interest-only. The entire unpaid balance of principal and interest shall be due and payable three (3) years from the Close of Escrow. Seller will not subordinate the First Deed of Trust to any Lender.
- **Contingency regarding Non-Profit 501-C-3 Status:** This offer is contingent upon the Buyer securing a Non-Profit 501-C-3 status with the Internal Revenue Service. The Wood River Waldorf Methods School, Inc has applied for 501-C-3 status and expects approval on or before August 15, 2013.
- **Contingency regarding Charter School Approval:** Buyer to gain approval as a Charter School from the Idaho Charter School Commission. The application will be approved or denied on or before August 15, 2013. In the event the Charter School is denied on August 15, 2013, Buyer and Seller agree to extend this contingency to the next application date of October 15, 2013.
- **Contingency regarding the Lot Lines:** Seller to identify the property corners. Approval of said property corners shall be at the sole discretion of the Buyer.
- **Contingency regarding Development Agreement:** Buyer to review and approve the Development Agreements with the City of Hailey. Approval of said Development Agreements to be at the sole discretion of the Buyer.

August 15, 2013

DocuSign Envelope ID: 00AC997C-1B20-4330-99AD-1AC46ED0B627

- **Closing:** The closing shall occur thirty calendar (30) days after a Purchase and Sale Agreement is fully executed by Buyer and Seller.
- **Title Company and Closing Costs:** This transaction shall be closed at First American Title, Ketchum, Idaho. Seller shall pay the title insurance and the escrow fee shall be split evenly between the Buyer and the Seller.

Buyer's Representation:

The parties hereto acknowledge that the Buyer is represented by Sheila Liermann of Keller Williams Sun Valley Southern Idaho. Seller shall compensate Keller Williams Sun Valley Southern Idaho a commission equal to two and a half percent (2.5%) of Purchase Price, payable at closing.

Offer Duration:

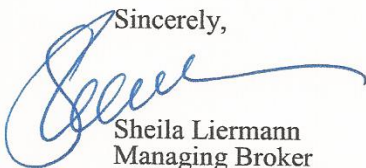
This Letter of Intent, unless extended by the Buyer, will expire if Seller has not accepted the Letter on or before Monday, July 15, 2013 @ 5 PM, Idaho Time.

If the foregoing sets forth an agreeable basis for proceeding, Seller should sign, date, and return to the undersigned the enclosed copy of this letter.

Neither party will be bound with respect to the property until a Purchase & Sale Agreement has been executed, but both parties shall use their best efforts to reach agreement thereon.

It is expressly understood by both parties that this letter of intent is not a binding agreement between the parties, or an agreement by any party to enter into a binding agreement, but is only intended to outline the terms and conditions under which both parties would consider entering into the Purchase & Sale Agreement. Neither party may claim any legal rights against the other by reason of signing this letter of intent or by taking any action in reliance thereon.

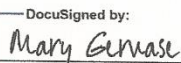
Sincerely,



Sheila Liermann
Managing Broker
Keller Williams Sun Valley Southern Idaho
Email: sunvalleysheila@gmail.com
Cell phone: 208.481.0450

Buyer's Agreement and Acceptance

By:

DocuSigned by:

MARY GERVASE, EXECUTIVE DIRECTOR
THE MOUNTAIN SCHOOL

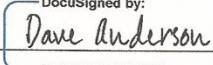
August 15, 2013

DocuSign Envelope ID: 00AC997C-1B20-4330-99AD-1AC46ED0B627

Dated: 7/14/2013

Seller's Agreement and Acceptance:

SPRENGER, GRUBB & ASSOCIATES

By: 
BF8347532BC94C0...

Its: President

Dated: 7/14/2013

END OF LETTER OF INTENT

Instrument # 548687

HAILEY, BLAINE, IDAHO

2007-06-14 11:15:00 No. of Pages: 8

Recorded for : CITY OF HAILEY

JOLYNN DRAGE

Fee: 24.00

Ex-Officio Recorder Deputy
Index to: AGREEMENT/CORRECTION

DEVELOPMENT AGREEMENT

THIS DEVELOPMENT AGREEMENT is made and entered into this 21st day of May, 2007, by and between the **CITY OF HAILEY, IDAHO**, a municipal corporation (hereinafter referred to as "City") and **SPRENGER, GRUBB & ASSOCIATES, INC.**, an Idaho corporation (hereinafter referred to as "SGA").

RECITALS

- A. City is a municipal corporation possessing all the powers granted to municipalities under the applicable provisions of the Idaho Code, including, without limitation, all powers under the Local Land Use Planning Act, as set forth in Idaho Code § 67-5501, et seq.
- B. SGA is the owner of record of certain real estate composed of various lots commonly described as Lots 1-7, Block 86, Woodside Plat 25 (approximately 2.4 acres), and more particularly described on Exhibit A hereto (hereinafter "Property A"), and Lots 1A and 2A, Block 61, Amended Woodside Plat 15 (approximately 3.4 acres), and more particularly described on Exhibit B hereto (hereinafter "Property B"). Said lots are collectively hereinafter referred to as the "Property."
- C. SGA has applied to City for an amendment to the official zoning map to rezone Property A from the Business (B) zoning district to General Residential (GR) zoning district, and rezone Property B from General Residential (GR) to Limited Business (LB), with certain rights and restrictions on the uses allowed.
- D. SGA proposes that the Property be developed pursuant to and in accordance with the City's Comprehensive Plan and Code, and in accordance with the terms and conditions of this Agreement.
- E. The requested zoning satisfies the requirements set forth in the City's Code for rezone, and the use of a development agreement will assure compliance with the conditions of rezone approval.
- F. SGA is the owner of record of Lot 3A of the Amended Woodside Plat No. 15. This parcel is subject to a Development Agreement dated January 10, 2005 between the parties, recorded with the Blaine County Recorder as instrument number 515669.
 - 1. Under the terms of this prior Development Agreement Lot 1A shall contribute 0.42 acres, Lot 2A shall contribute 0.53 acres, and Lot 3A shall contribute 0.06 acres for park space (for a total of 1.01 acres). See Development Agreement, dated January 10, 2005, Section 2(b).
 - 2. SGA proposes that the 0.06 park contribution requirement shall be shifted from Lot 3A to both Lots 1A and 2A, so that Lot 1A shall contribute 0.44 acres, Lot 2A shall contribute 0.57 acres, and Lot 3A shall contribute no acreage (for a total of 1.01 acres).

- G. Pursuant to § 67-6511A, Idaho Code, the City has the authority to rezone the Property and to enter into this Agreement.
- H. The City's Planning & Zoning Commission and City Council have held public hearings as prescribed by law with respect to the rezoning of the Property and this Agreement.
- I. All public hearings have been or will be conducted pursuant to notice as required by law, and all other action required to be held or taken prior to the adoption and execution of this Agreement has been or will be held and/or taken.
- J. Nothing herein shall be construed to obligate City to approve the rezone of the Property. The parties enter into this Development Agreement for the express purposes of setting forth their obligations each to the other in the event that such rezone is approved by City. It is specifically understood, acknowledged and agreed, that each of the obligations hereinafter set forth shall not mature or be legally enforceable until such time as the rezone of the Property has been approved by City in form and content acceptable to SGA.
- K. It is the intent and desire of the parties hereto that the development and the proposed use of the Property proceed as provided herein, subject to the terms and conditions of this Agreement.
- L. The parties enter into this Agreement with mutual consideration as reflected in the covenants, duties and obligations herein set forth.

AGREEMENT

NOW, THEREFORE, in consideration of the above recitals which are incorporated herein, and the mutual covenants and agreements herein contained and other good and valuable consideration, the sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

1. GR Zoning. The zoning classification for Property A shall be changed from Business to General Residential.
2. LB Zoning with Restricted Use. The zoning classification for Property B shall be changed from General Residential to Limited Business (LB), and shall be restricted to development for residential purposes only.
3. Park Requirements for Lots 1A, 2A and 3A. The terms of paragraph 2(b) of the January 10, 2005 Development Agreement between the parties, recorded with the Blaine County Recorder as instrument number 515669, shall be amended and modified so that the 0.06 park contribution requirement for Lot 3A shall be deleted due to its lot size of 0.23 acres, which would allow a maximum of two dwelling units, not subject to Hailey's current parks dedication requirement. The park contribution requirement for Lots 1A and 2A shall continue with both lots contributing park land and improvements as set forth in Paragraph 4 herein. All other terms and conditions of the January 10, 2005 Development Agreement shall remain in full force and effect unless expressly modified or contradicted herein.

4. Conditions. Property A and B shall be subject to all rights and restrictions as set forth in the existing Hailey Subdivision Ordinance. In particular, because Property B is located in the Limited Business (LB) zoning district, the area required for a Park shall be reduced by 75%, but in no event shall the area required for a Park/Cultural Space exceed 17.5% of the area of the lot(s) being developed. See Subdivision Ordinance, § 4.10.1.1, Parks. The parties expressly understand under the existing §4.10.1.1 of the Subdivision Ordinance, the park contribution in acres for Property B is calculated by multiplying the number of single family lots, residential townhouse sub-lots or residential condominium units by .0277, which is then reduced by 75%, but the minimum park acreage for Property B shall be .238 acres (.95 x .25) or more. By way of example only, if density of single family lots, residential townhouse sub-lots or residential condominium units is 20 lots, sub-lots or units per acre on Property B, the park contribution shall equal .471 acres (20 x .0277 x 3.4 x .25), and the owner(s) of Property B shall provide .471 acres of park space, plus improvements pursuant to §4.10.4 of the Subdivision Ordinance, or make in-lieu contributions pursuant to §4.10.8 of the Subdivision Ordinance. SGA and City are mutually bound by, and shall comply with all of the conditions contained in the final decision and findings of fact of the City and this Agreement.

5. Remedies. In the event SGA, its successors and assigns, subsequent owners of the Property or any other person or entity acquiring an interest in the Property, fails to faithfully comply with all of the terms and conditions included in this Agreement in connection with a portion of the Property, this Agreement may be enforced by an appropriate action at law or in equity to secure the performance of the covenants, agreements, conditions and obligations contained herein, and may include an action for specific performance, breach of contract, reformation and/or rescission.

6. Force Majeure. If either party hereto is delayed in the performance of any of its obligations hereunder because of inclement weather, labor dispute or strike, civil strife, reasons beyond such parties control, acts of God, actions by the State of Idaho or any of its agencies, or political subdivisions, the time for performance shall be extended for the same time as loss by the cause herein set forth.

7. Police Power. Nothing contained herein is intended to limit the police power of City or its discretion of review of subsequent applications regarding development of the Property. This Agreement shall not be construed to modify or waive any law, ordinance, rule, or regulation, including, without limitation, applicable building codes, fire codes, the City Zoning Ordinance, or the City Subdivision Ordinance.

8. Amendment. Upon final action to rezone the Property consistent with the terms hereof, this Development Agreement shall constitute a mutual commitment of the parties in accordance with Idaho Code § 67-6511A and applicable ordinances of the City. This Development Agreement may be revised, amended or canceled in whole or in part, only by means of a written instrument executed by both parties hereto. City and SGA agree to cooperate with each other in adopting any amendment which may reasonably be requested. Such cooperation shall be extended by City so long as the proposed amendment does not in the opinion of City, defeat the purposes of this Development Agreement.

9. Specific Performance. In the event of a breach of this Development Agreement, this Development Agreement shall be enforceable by specific performance by either party hereto, in addition to all other remedies at law or in equity. All remedies shall be cumulative.

10. Attorney's Fees. In the event either party hereto is required to retain counsel to enforce a provision of this Development Agreement, or to recover damages resulting from a breach thereof, the prevailing party shall be entitled to recover from the other party all reasonable costs and attorney's fees incurred therein, including costs and/or attorney's fees on appeal.

11. Notices. All notices required or provided for under this Development Agreement shall be in writing and deemed deliberate upon delivery in person, or upon mailing by certified mail, postage pre-paid. Notices to City shall be addressed as follows:

City of Hailey
Attention: Planning & Zoning Administrator
P.O. Box 945
Hailey, Idaho 83333

Notices given to SGA shall be addressed as follows:

Sprenger Grubb & Associates, Inc.
2010 Silvercreek Ln
Boise, ID 83706.

A party may change the address to which further notices are to be sent by notice in writing to the other party, and thereafter notices shall be addressed and transmitted to the new address.

12. Effectiveness Upon Execution. This Development Agreement shall become effective only upon adoption of the Ordinance(s) accomplishing the rezones described herein.

13. Relationship of Parties. It is understood that the contractual relationship between City and SGA is such that SGA is not the agent, partner or joint venturer of City. SGA hereby guarantees actual development and performance in accordance with the terms and conditions set forth in this Development Agreement.

14. Successors and Assigns. This Development Agreement shall inure to the benefit of, and be binding upon, City and SGA and their respective heirs, successors and assigns. This Development Agreement, and all conditions set forth herein, shall be and are hereby declared to be a covenant running with the land with regard to the Property described in Exhibits "A" and "B", or any portion thereof.

15. Recordation. This Agreement shall be recorded with the Blaine County Recorder by the City.

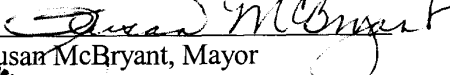
16. Partial Invalidity. In the event any portion of this Development Agreement, or

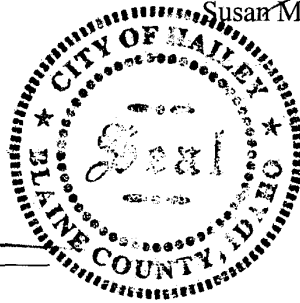
portion thereof, shall be determined by any court of competent jurisdiction to be invalid, void or otherwise unenforceable, the remaining provisions of this Development Agreement, or parties thereof, shall remain in full force and effect and shall in no way shall be affected, impaired or invalidated as a result thereof. It is agreed and understood by the parties hereto that such remaining provisions shall be construed in a manner most closely approximating the intention of the parties with respect to the invalid, void or unenforceable provision or portion thereof.

17. Authority to Execute. Each of the entities executing this Development Agreement represent and warrant that such executing party has the lawful authority and authorization to execute this Development Agreement, as well as all deeds, easements, liens and other documents required hereunder, for and on behalf of the party executing this Development Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Development Agreement on the day and year first above written.

CITY OF HAILEY

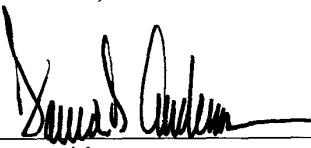
By: 
Susan McBryant, Mayor



ATTEST:


Heather Dawson, City Clerk

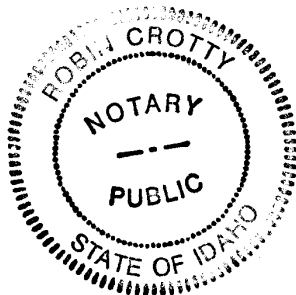
SPRENGER, GRUBB & ASSOCIATES, INC.

By: 
Its: President

STATE OF IDAHO)
)ss.
County of Blaine)

On this 21st day of May, 2007, before me, a Notary Public, in and for said County and State, personally appeared Susan McBryant and Heather Dawson, known or identified to me to be the Mayor and City Clerk, respectively, of CITY OF HAILEY, the municipal corporation that executed the foregoing instrument, and acknowledged to me that such municipality executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.

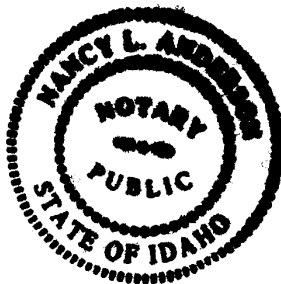


Robin Crotty
NOTARY PUBLIC FOR IDAHO
Residing at: Hailey City Hall
My commission expires: 7/29/08



STATE OF IDAHO)
)ss.
County of Ada)

On this 5th day of June, 2007, before me, a Notary Public, in and for said County and State, personally appeared David D. Anderson, known or identified to me to be the President, of SPRENGER GRUBB & ASSOCIATES, INC., the corporation that executed the foregoing instrument, and acknowledged to me that such corporation executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.



Nancy L. Anderson
NOTARY PUBLIC FOR IDAHO
Residing at: Boise
My commission expires: 2-27-08

Prop Type: Vacant Land		MLS#: 07-302664 Status: Cancelled		Address: TBD Winterhaven Drive		Price: \$ 591,500	
		Area Hailey		Sub Type Multi-Family Land			
		City Hailey		Taxes \$ 2,698.12			
		State/Province ID		Tax Year 2006			
		Zip Code 83333		HOE			
		County Blaine		Assn Dues			
		Subdivision Woodside		Assn Dues Frequency			
		Assessor's Parcel # RPH0475061002A		Spec Assess			
		Waterfront if Appcbl No		Spec Assmt Frequency			
				Master Assc or Other			
				Master Frequency			
				Waterfront if Appcbl No			
		Zoning: H/LB		Terms: Cash			
Parcel Acres Apx 1.94		Documents: Plat		Utilities On Site: City/Public Water; Electric; Sewer; Telephone			
Parcel Size Per Plat		Other Disclosures: Avalanche; CC & R's; Other		Waterfront: No			
Parcel SqFt Apx 84,506							
Possession On Closing							
Road Surface: Paved		Legal: Lot 2A; Block 1; Amended Woodside #15					
Road Access: Public		Features Exterior: Near Park					
		To Show: Call Office; Go; To Show Phone: 208.720.1256					
Excluded Items: n/a Excluded Parties: none Public Remarks: Large, 1.94 acre development parcel in the Hailey city limits. Limited Business zoning allows for high density development. Talk to your broker about allowable use and development agreement with City. Realtor Remarks: Large development piece in the Hailey city limits. Newly upzoned to LB, restricted by Development Agreement with City to residential development only. Tack MLS#07-302663 onto this purchase for a full 3 1/2 acres. Call your developers asap, or listing broker for more info. Directions: Hwy. 75 to Countryside Blvd. to Woodside Blvd. South on Woodside, east on Winterhaven. Property is on the south side of Winterhaven Drive.							
List Date 05/22/2007		Days On Market 1302		Exp Date			
Cancel Date 12/14/2010		Status Change Date 12/14/2010		Owner Sprenger, Grubb & Associates			
Agent Owned No		SOC Buyer to Pay		BC RTH			
LA: Jason T. Roth LO: Coldwell Banker Distinctive Properties Office : (208) 622-3400 Office : theresa.pemberton@coldwellbanker.com							
		<i>Provided as a courtesy of</i> Randy Flood, Associate Broker (AB), AB Windermere Real Estate - Hailey 100 N Main Street PO Box 1270 Hailey, ID 83333 Windermere Hailey - (208) 788-1700 ext. 32 Cell - (208) 720-0776 rflood@windermere.com http://www.randy-flood.com					

Information is deemed to be reliable, but is not guaranteed. © 2013 [MLS](#) and [FBS](#).

Prepared by Randy Flood, Associate Broker (AB), AB on Monday, July 15, 2013 4:32 PM

The information on this sheet has been made available by the MLS and may not be the listing of the provider.

Idaho Public Charter School Commission

Charter Petition: Facility Details

School Name: Syringa Mountain School	Details for (in order of preference): Option 3
Facility Name / Title: 410 West Bullion Street	Option Status: Possible
Location Address: 410 West Bullion Street, Hailey, ID & 3.00 acres contiguous bare land.	Primary Vendor Information (if applicable) Listing Agent Sonja Huntsman 208-720-7125 (0.98 Acre Site) Dave Cropper 208-309-2005 (3 Acres Leased Land)

Narrative

This property would be great, but we defined the status as "Possible" because there are two different ownership groups. The 0.98 acre is in the city of Hailey and zoned General Residential, which allows for schools. This means no other entitlement proceedings would need to occur. The proposed contiguous leased ground is in Blaine County and would be contemplated as our farm and garden area. The county zoning permits this use. The total size of this site would be 3.98 acres.

Currently 410 West Bullion Street has three residential dwellings which would likely be demolished. The county property is currently vacant. If the 410 West Bullion Street property is purchased and the grounds contiguous are leased, this should be sufficient for the future needs of the school.

This location fits the ideals of the Waldorf principals. It is nearly river front property, adjacent to walking easements allowing access to the Draper Preserve and Lions Park. This location provides immediate access to the riparian corridor adjacent to the Big Wood River. This site is NOT in any subdivision, and thus has no covenants, conditions and restrictions. It is a partially treed, relatively square parcel that provides excellent street access from West Bullion. There is sufficient space to accommodate the three modular classrooms that are contemplated. This site addresses the need for parking with the City of Hailey. At Lions Park, over 100 cars can be parked in proximity to the location.

We have discussed this option with the City Planner, Micah Austin, and he sees no impediments to this proposal and thinks this is a great site for the school.

August 15, 2013

We are in verbal contact with the seller of 410 West Bullion, whose asking price is \$698,000 (Six Hundred and Ninety Eight Thousand Dollars), which we are proposing to pay as the price. Seller financing is not available, so we are proposing to make a 50% down payment and finance the balance with a 20-year mortgage at 5.50%. On the contiguous county parcel, we are in contact with the owner's agent and the annual rents are anticipated to be minimal, less than \$5,000.00 per year.

For facility infrastructure we will lease three double wide mobile classrooms for a period of four years. Each pod is 24x60 feet (1,440 sq. ft.), containing two classrooms and two bathrooms. Three pods will provide six classrooms. Each pod's monthly rate will be \$2,303.00. A detailed description from Specialty Modular is attached.

A capital campaign will be organized at a later date for placement of permanent structures and the note balance.

Fees due to the City of Hailey

Building Permits: \$4,833.00 based on \$300,000 of improvements

City and Water Hook Up Fees, 1.5 Inch Line: \$26,033.00

Impact Fee, \$141.00 per student: \$23,265.00 *

*This fee is appealable under city code 15.16.090.01 and we will appeal it based on the fact that the students coming to the school have already been accounted for in fees previously paid by the Blaine County School District.

Draft Facility Budgets

Pre-Opening Expenses (required)

[Please insert rows as needed]

Description	Qty	Unit Cost	Total Cost	Comments
Down Payment	1	\$349,000	\$349,000	Down payment of 50% of asking price.
Mobile Classroom Installation	1	\$33,240	\$33,240	Delivery, Set-Up, Anchors, Skirting, Foundation Plan for three mobile classrooms
Mobile Classroom Site Preparation	1	\$10,000	\$10,000	
Additional Site Preparation	1	\$30,000	\$30,000	Parking lot, landscaping, etc.
Building Permits	1	\$4,833	\$4,833	Based on \$300,000 of improvements
City and Water Hook-Up Fees	1	\$26,033	\$26,033	1.5 Inch Line

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Impact Fee	165	\$141	\$23,265	
TOTAL Pre-Opening Costs			\$476,371	

Operating Expenses: Year 1 & Year 2 (required)

[Please insert rows as needed]

Description	Year 1 Qty	Year 1 Unit Cost	Year 1 Total Cost	Year 2 Qty	Year 2 Unit Cost	Year 2 Total Cost	Comments
Mobile Classroom Lease	3	\$2,303	\$82,908	4	\$2,303	\$110,544	Each unit houses 2 classrooms
Bare Land Lease	1	\$417	\$5,000	1	\$417	\$5,000	
Debt Service (Principal & Interest)	1	\$2,401	\$28,809	1	\$2,401	\$28,809	D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL Year 1 Costs			\$116,717	TOTAL Year 2 Costs			\$144,353

Operating Expenses: Year 3 (required) & Year 4 or Future Expansion (optional)

[Please insert rows as needed]

Description	Year 3 Qty	Year 3 Unit Cost	Year 3 Total Cost	4 / Exp Qty	Year 4 or Expansion Unit Cost	Year 4 or Expansion Total Cost	Comments
Mobile Classroom Lease	5	\$2,303	\$138,180				Each unit houses 2 classrooms
Bare Land Lease	1	\$417	\$5,000				
Debt Service (Principal & Interest)	1	\$2,401	\$28,809				D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL Year 3			\$171,989	TOTAL Year 4 or Expansion			

August 15, 2013

Costs

Costs


List of Attachments

Attachments (required)

[Please insert rows as needed. List all documents related to this facility's location, costs, etc.]

Attachment Title	Brief Description	Notes or Considerations
410 W Bullion Site Plat Amended to Include Leased Ground	Aerial Plat photo of the subject property	
Specialty Modular Inc	Modular Classroom Lease and description	
County Tax and Legal Description		
Former MLS Listing Information		
LOI between parties	Letter of Intent to be attached at later date	
LOI between parties	Letter of Intent to be attached at later date	

August 15, 2013

Prop Type: Residential		MLS#: 12-311887 Status: Expired		Address: 410 W Bullion St		Price: \$ 695,000	
		Area Hailey		Sub Type Multi-Family			
		Price SqFt 255.33		Taxes \$ 3,090			
		City Hailey		Tax Year 2011			
		State/Prov ID		HOE No			
		Zip Code 83333		Assn Dues			
		County Blaine		Assn Dues Freq			
		Subdivision Other		Spec Assess			
		Parcel#: RPH2N18009059A		Spec Assmt Freq			
		Waterfront No		M. Assc or Oth			
				Master Frequency			
		Zoning: H/GR		Terms: Cash			
Bedrooms 4		Construction Type: Site-built (Stick) Style: 1 Story; 2 Story; Cabin Garage: 2 Car Heat: EBB Water Heater: Electric Roof: Composition; Shake/Shingle Exterior Finish: Wood		Total SQFT Livable: 2722 SF Asry Dwell Det: SF Bsmt-Fin w/Egress: SF Bsmt Fin N/Egr/In: SF Bsmt - Unf SF Deck: SF Garage: SF Per: Assessor			
Baths 3.00							
Parcel Acres Apx 0.98							
Parcel Size Per Assessor							
Parcel SqFt Apx 42,602							
Possession On Closing							
Year Built 1945							
Yr Remodeled 1960							
Complete							
Road Surface: Paved		Legal: Tax Lot 8101, fraction of E half of SW section 9, 2N, 18E Excluded Items: tenant's and owner's personal belongings Excluded Party:					
Road Access: Public							
Water: City Connected		Items Included: Dishwasher; Dryer; Range - Elec; Refrigerator; Washer To Show: Occupied Tenant; Prior Day Notice; Sign; To Show Phone: 720-7125					
Sewer: City/Public							
Other Disclosures: Lead Base Paint							
Features Exterior: Near Park; Views							
Features Interior: Fireplace Wood; Window Coverings							
Public Remarks: Almost an acre adjacent to the Big Wood River and not in flood plain. Currently livable 3 buildings (a 2-story 2044 sq. ft. main home, a 678 sq. ft. home and a detached garage and more... Development potential for 5 townhomes. General residential zoning allows single and multi-family, schools, day care, church, urban agriculture, park, home occupation, accessory dwelling.							
Realtor Remarks: There is a 40 foot easement between this property and the river that can never be built on or have road access. On this property are three dwellings, sheds, garage, manager's storage building.							
Directions: Go West on Bullion, property on right just before the Big Wood River on left.							
List Date	01/21/2012	Days On Market	285	Exp Date			

August 15, 2013

Status Change Date	11/01/2012	Agent Owned	No	SOC	3%
BC	WSV	REO	No	Short Sale	No
Owner	410 Bullion St. LLC				

LA: Sonja Huntsman

Prop Type: Vacant Land	MLS#: 10-309995 Status: Expired	Address: 410 W Bullion St	Price: \$ 899,000
------------------------	---------------------------------	---------------------------	-------------------



		Area	Hailey	Sub Type	Multi-Family Land
		City	Hailey	Taxes	\$ 3,090
		State/Province	ID	Tax Year	2010
		Zip Code	83333	HOE	No
		County	Blaine	Assn Dues	
		Subdivision	Other	Assn Dues Frequency	
		Assessor's Parcel #	RPH2N18009059A	Spec Assess	
		Waterfront if Appcbl	No	Spec Assmt Frequency	
				Master Assc or Other	
				Master Frequency	
				Waterfront if Appcbl	No
		Zoning:	H/GR	Terms:	Cash
Parcel Acres Apx	0.98	Other Disclosures:	Lead Base Paint	Utilities On	Cable; City/Public Water; Electric;
Parcel Size Per	Assessor			Site:	Sewer; Telephone
Parcel SqFt Apx	42,689			Utilities at	Cable; City/Public Water; Electric; Gas;
Possession	On Closing			Road:	Sewer; Telephone
				Waterfront:	River; See Realtor Remarks
Road Surface:	Paved	Legal: Tax lot 8101, fraction of E half of SW sec 9 2N 18E			
Road Access:	Public	Features Exterior: Fence; Near Park; Outbuildings; Views			
		To Show: Call Office; Must Accompany; Occupied Tenant; To Show Phone: 720-7125; Prior Day Notice; Sign			

Excluded Items: tenant and owner personal belongings

Public Remarks: Almost an acre adjacent to the Big Wood River and not in flood plain. Currently 4 buildings (a 2-story 2044 sq. ft. main home, a 678 sq. ft. home and a detached garage and more... Development potential for 5 townhomes. General residential zoning allows single and multi-family, schools, day care, church, urban agriculture, park, home occupation, accessory dwelling.

Realtor Remarks: Also conditional uses: Bed & Breakfast, public and semi-public use facilities. There is a 40 foot easement between this property and the river

August 15, 2013

that can never be built on or have road access. 3 dwellings, sheds, garage, manager's storage building.
Directions: 4 blocks west of the stop light at Main & Bullion, on south side of street

List Date	12/08/2010	Days On Market	204	Exp Date	
Status Change Date	06/30/2011	Owner	410 West Bullion LLC	Agent Owned	No
SOC	3%	BC	WSV	REO	No
Short Sale	No				

LA: Sonja Huntsman
LO: Windermere Real Estate - SV Office : (208) 622-2700 Office : ketchum@windermere.com

LETTER OF INTENT

July 15, 2013

Monday, July 15, 2013

Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC, respectfully submits this Non-Binding Letter of Intent for the purchase of the property described below.

The general terms and conditions of this proposal are as follows:

Seller: 410 W BULLION ST LLC c/o THOMAS A EHRENBURG

Buyer: Wood River Waldorf Methods School, Inc. DBA Syringa Mountain School (Hereinafter referred to as the "Charter School.")

Terms:

- **Property:** Tax Lot 8101, fraction of E half of SW section 9, 2N, 18E in Hailey Idaho, Parcel Number RPH2N180090120
-
- **Purchase Price** = \$660,000.00 (Six Hundred and Sixty Thousand Dollar)
- **Earnest Money:** To be deposited into the Windermere Sun Valley LLC Trust Account five business days after conversion of this Letter of Intent into a fully executed Purchase & Sale Agreement.
- **Terms:** Buyer shall pay cash at closing for \$660,000. The source of cash purchase will be 50% down payment and 50% loan proceeds.
- **Contingency regarding Financing:** This offer is contingent on obtaining financing. Buyer will obtain bank financing with 50% down payment at the close of escrow and execute 20-year loan on the balance of the purchase from DL Evans Bank. The unpaid principal balance shall bear interest at the rate of five percent (5%) per annum, amortized over 20 years.
-
- **Contingency regarding Non-Profit 501-C-3 Status:** This offer is contingent upon the Buyer securing a Non-Profit 501-C-3 status with the Internal Revenue Service. The Wood River Waldorf Methods School, Inc has applied for 501-C-3 status and expects approval on or before August 15, 2013.
- **Contingency regarding Charter School Approval:** Buyer to gain approval as a Charter School from the Idaho Charter School Commission. The application will be approved or denied on or before August 15, 2013. In the event the Charter School is denied on August 15, 2013, Buyer and Seller agree to extend this contingency to the next application date of October 15, 2013.
- **Contingency regarding the Lot Lines:** Seller to identify the property corners. Approval of said property corners shall be at the sole discretion of the Buyer.
- **Contingency regarding Development Agreement:** Buyer to review and approve the Development Agreements with the City of Hailey. Approval of said Development Agreements to be at the sole discretion of the Buyer. Seller to be responsible for any prior

development agreements and or costs of those agreements with the City of Hailey.

- **Closing:** The closing shall occur thirty calendar (30) days after a Purchase and Sale Agreement is fully executed by Buyer and Seller.
- **Title Company and Closing Costs:** This transaction shall be closed at First American Title, Ketchum, Idaho. Seller shall pay the title insurance and the escrow fee shall be split evenly between the Buyer and the Seller.

Buyer's Representation:

The parties hereto acknowledge that the Buyer is represented by Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC. Seller shall compensate Randy Flood Associate Broker at Windermere Real Estate / Sun Valley LLC a commission equal to three percent (3.0%) of Purchase Price, payable at closing.

Seller's Representation:

The parties hereto acknowledge that the Seller is represented by Sonja Huntsman Associate Broker at Keller Williams Sun Valley Southern Idaho. Seller shall compensate Sonja Huntsman Associate Broker at Keller Williams Sun Valley Southern Idaho a commission equal to three percent (3.0%) of Purchase Price, payable at closing.

Offer Duration:

This Letter of Intent, unless extended by the Buyer, will expire if Seller has not accepted the Letter on or before Friday, July 19, 2013 @ 5 PM, Idaho Time.

If the foregoing sets forth an agreeable basis for proceeding, Seller should sign, date, and return to the undersigned the enclosed copy of this letter.

Neither party will be bound with respect to the property until a Purchase & Sale Agreement has been executed, but both parties shall use their best efforts to reach agreement thereon.

It is expressly understood by both parties that this letter of intent is not a binding agreement between the parties, or an agreement by any party to enter into a binding agreement, but is only intended to outline the terms and conditions under which both parties would consider entering into the Purchase & Sale Agreement. Neither party may claim any legal rights against the other by reason of signing this letter of intent or by taking any action in reliance thereon.

Sincerely,

Randy H. Flood
Associate Broker
Windermere Real Estate / Sun Valley LLC

Cell 208.720.0776
Office 208.788.1700 ext. 32
Fax 208.788.3756
rflood@windermere.com
<http://www.randy-flood.com>
<http://www.realsunvalleyestates.com>

Buyer's Agreement and Acceptance

By: _____
MARY GERVASE, EXECUTIVE DIRECTOR
THE MOUNTAIN SCHOOL

Dated: _____

Seller's Agreement and Acceptance:

410 W BULLION ST LLC c/o THOMAS A EHRENBURG

By: _____

Its: _____

Dated: _____

END OF LETTER OF INTENT

August 15, 2013

Option 3 410 W Bullion




Page 124

August 15, 2013

Option 1 410 W Bullion

:xmls Web

http://saw.flexmls.com/cgi-bin/mainmenu.cgi

Prop Type: Residential		MLS#: 12-311887 Status: Expired		Address: 410 W Bullion St		Price: \$ 695,000	
		Area Hailey		Sub Type Multi-Family			
		Price SqFt 255.33		Taxes \$ 3,090			
		City Hailey		Tax Year 2011			
		State/Prov ID		HOE No			
		Zip Code 83333		Assn Dues			
		County Blaine		Assn Dues Freq			
		Subdivision Other		Spec Assess			
		Parcel#: RPH2N18009059A		Spec Assmt Freq			
		Waterfront No		M. Assc or Oth			
				Master Frequency			
		Zoning: H/GR		Terms: Cash			
Bedrooms 4		Construction Type: Site-built (Stick)		Total SQFT Livable: 2722			
Baths 3.00		Style: 1 Story; 2 Story; Cabin		SF Asry Dwell Det:			
Parcel Acres Apx 0.98		Garage: 2 Car		SF Bsmt-Fin w/Egress:			
Parcel Size Per Assessor		Heat: EBB		SF Bsmt Fin N/Egr/In:			
Parcel SqFt Apx 42,602		Water Heater: Electric		SF Bsmt - Unf			
Possession On Closing		Roof: Composition; Shake/Shingle		SF Deck:			
Year Built 1945		Exterior Finish: Wood		SF Garage:			
Yr Remodeled Complete 1960				SF Per: Assessor			
Road Surface: Paved		Legal: Tax Lot 8101, fraction of E half of SW section 9, 2N, 18E					
Road Access: Public		Excluded Items: tenant's and owner's personal belongings					
Water: City Connected		Excluded Party:					
Sewer: City/Public		Items Included: Dishwasher; Dryer; Range - Elec; Refrigerator; Washer					
Other Disclosures: Lead Base Paint		To Show: Occupied Tenant; Prior Day Notice; Sign; To Show Phone: 720-7125					
Features Exterior: Near Park; Views							
Features Interior: Fireplace Wood; Window Coverings							
Public Remarks: Almost an acre adjacent to the Big Wood River and not in flood plain. Currently livable 3 buildings (a 2-story 2044 sq. ft. main home, a 678 sq. ft. home and a detached garage and more... Development potential for 5 townhomes. General residential zoning allows single and multi-family, schools, day care, church, urban agriculture, park, home occupation, accessory dwelling.							
Realtor Remarks: There is a 40 foot easement between this property and the river that can never be built on or have road access. On this property are three dwellings, sheds, garage, manager's storage building.							
Directions: Go West on Bullion, property on right just before the Big Wood River on left.							
List Date 01/21/2012		Days On Market 285		Exp Date			
Status Change Date 11/01/2012		Agent Owned No		SOC 3%			
BC WSV		REO No		Short Sale No			
Owner 410 Bullion St. LLC							
LA: Sonja Huntsman							
LO: Windermere Real Estate - SV Office : (208) 622-2700 Office : ketchum@windermere.com							
		<i>Provided as a courtesy of</i> Randy Flood, Associate Broker (AB), AB Windermere Real Estate - Hailey 100 N Main Street PO Box 1270 Hailey, ID 83333 Windermere Hailey - (208) 788-1700 ext. 32 Cell - (208) 720-0776 rflood@windermere.com http://www.randy-flood.com					

Information is deemed to be reliable, but is not guaranteed. © 2013 MLS and FBS.
Prepared by Randy Flood, Associate Broker (AB), AB on Tuesday, July 09, 2013 3:10 PM
The information on this sheet has been made available by the MLS and may not be the listing of the provider.

August 15, 2013
Option 1 410 W Bullion

exmls Web

<http://saw.flexmls.com/cgi-bin/mainmenu.cgi>

River



From Street



Main home NE corner



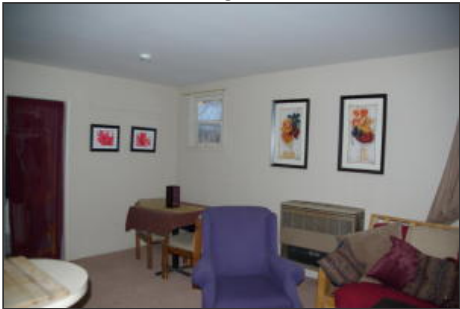
Smaller home towards river



Kitchen



Dining room



August 15, 2013
Option 1 410 W Bullion

flexmls Web

<http://saw.flexmls.com/cgi-bin/mainmenu.cgi>

Living room



Buildings



Manager's building



Buildings



Buildings



Yard



August 15, 2013

Option 1 410 W Bullion

flexmls Web

<http://saw.flexmls.com/cgi-bin/mainmenu.cgi>

Garage



River house kitchen



River house kitchen to living room



River through trees



Living room fireplace



Big house kitchen



August 15, 2013
Option 1 410 W Bullion

flexmls Web

<http://saw.flexmls.com/cgi-bin/mainmenu.cgi>

Big house kitchen



Back house



Summer big house

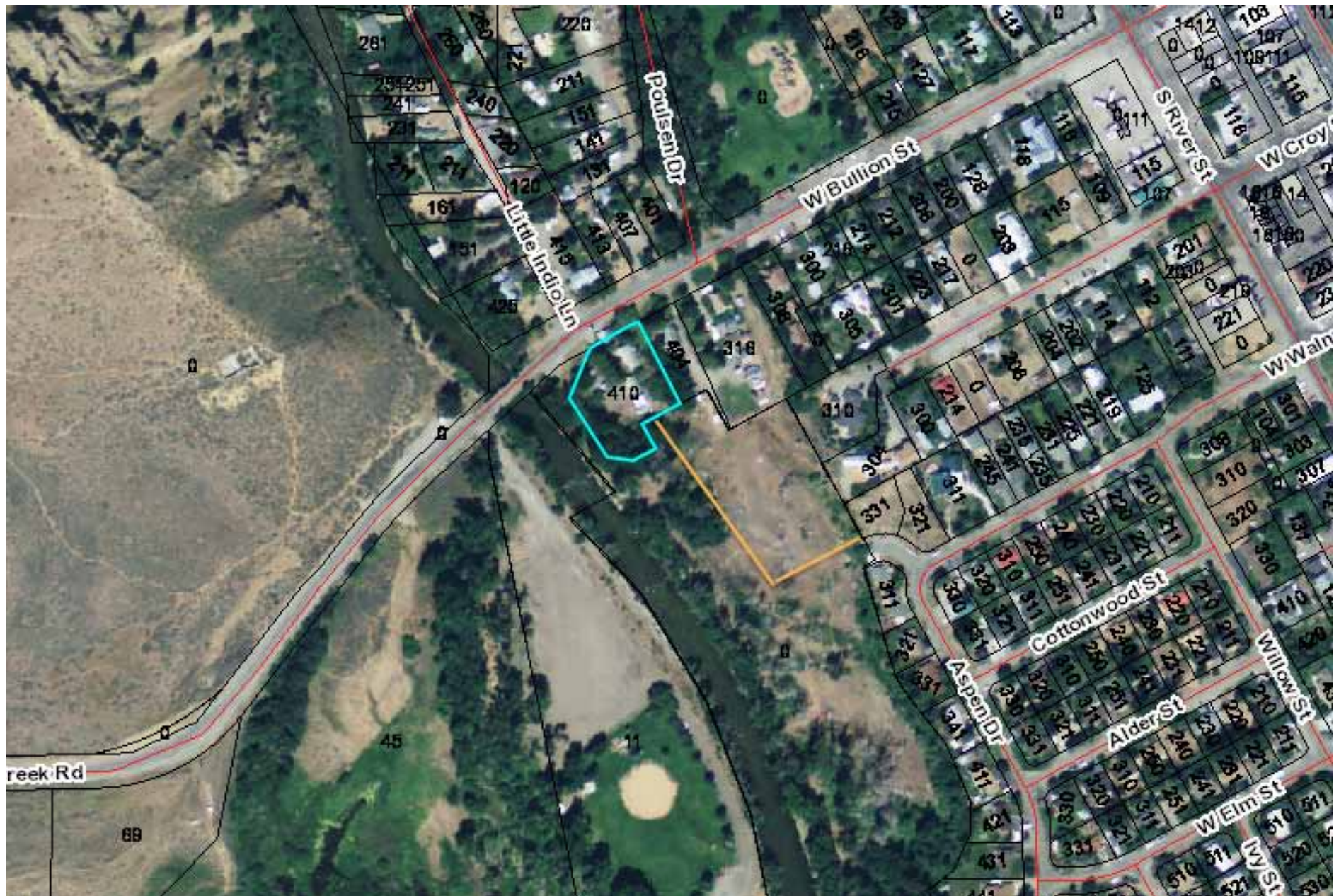


Option 3 404 W Bullion



August 15, 2013

Option 3 410 W Bullion with 3 Acres on Caplow



Option 3 404 W Bullion with 3 Acres on Caplow



August 15, 2013

Non-Binding Letter of Intent

Date: 7/15/13

RE: Non-Binding Letter of Intent to Purchase Commercial Property ("Letter of Intent")

Dear: Jeff and Darrin,

John Alan Partners on behalf of Wood River Waldorf Methods School Inc. dba Syringa Mountain School, respectfully submits this Letter of Intent to purchase the herein referenced property. The general terms and conditions of this proposal are as follows:

Property: Copper Ranch Condo #5 Parcel B1 commonly known as 1970 Woodside Boulevard, The Club at Copper Ranch and Copper Ranch Condo #1 AM Parcel A5 Phase 6.

Seller: Lido Equities Group-Idaho LLC

Buyer: Wood River Waldorf Methods School Inc. dba Syringa Mountain School,

Purchase Price: The purchase price of the Property shall be \$600,000.00

Purchase Agreement: This transaction is subject to the negotiation and execution of an agreement of purchase and sale ("Purchase Agreement"), in form and substance satisfactory to both parties. Upon Buyer's and Seller's acceptance of this Letter of Intent, Buyer will begin their review for the feasibility of purchasing the subject property. Said review will follow the terms and conditions set forth under Condition Precedent and Other Contingencies as referenced below. Within 30 calendar days from written acceptance from Buyer of Buyer's complete approval of all Conditions Precedent and Other Contingencies as indicated below Buyer will submit to Seller for Seller's approval a Purchase and Sale Agreement. Buyer and Seller to have 30 calendar days from receipt of said Purchase and Sale Agreement to mutually accept and execute..

Deposit: Within 5 calendar days after the mutual acceptance of the Purchase Agreement, Buyer shall deposit \$25,000.00 as Earnest Money (the "Deposit") with Sun Valley Title (the "Title Company"). Deposit is non-refundable and will be applied to the purchase price.

Conditions Precedent: Buyer's decision to proceed with the purchase of the Property is contingent upon its review, analysis and acceptance in its sole discretion of matters related to the physical, legal, and economic conditions of the Property, including, but not limited to, Buyer's review of the documents set forth in Exhibit A to this letter. Seller shall deliver all of said documents in Seller's possession to Buyer within 5 calendar days following the mutual acceptance of this Letter of Intent.

Other Contingencies:

A. Contingency regarding Non-Profit 501-C-3 Status: This offer is contingent upon the Buyer securing a Non-Profit 501-C-3 status with the Internal Revenue Service. The Wood River Waldorf Methods School, Inc. has applied for 501-C-3 status and expects approval on or before August 15, 2013.

B. Contingency regarding Charter School Approval: Buyer to gain approval as a Charter School from the Idaho Charter School Commission. The application will be approved or denied on or before August 15, 2013. In the event the Charter School is denied on August 15, 2013, Buyer and Seller agree to extend this contingency to the next application date of October 15, 2013.

C. Contingency regarding the Lot Lines: Seller at Seller's expense to identify the property corners. Approval of said property corners shall be at the sole discretion of the Buyer and occur prior to approval of the Purchase and Sale Agreement.

August 15, 2013

Review Period: Buyer to have until August 16th, 2013 to approve at their sole discretion all of the terms and conditions referenced under Condition Precedent and Other Contingencies. Buyer may elect to extend approval until October 16th, 2013.

Closing: Closing shall take place on the first business day after 30 calendar days from mutual written acceptance of the Purchase and Sale Agreement by both parties.

Closing Costs: All normal closing costs shall be shared by the parties on a 50/50 basis except the costs of ALTA Standard Coverage Title Insurance, which shall be the sole responsibility of the Seller.

Representation: The Buyer and Seller are represented by John Alan Partners of Ketchum Idaho. At closing a commission shall be paid by Seller to John Alan Partners in the amount of five percent 5% of the Purchase Price through escrow.

Confidentiality: Buyer and Seller agree to keep this offer and subsequent transaction confidential and not disclose any information regarding it, including but not limited to all information set forth in the due diligence materials ("Confidential Information"), and to exercise the same degree of care with respect to the other party's Confidential Information as is exercised in preserving and safeguarding its own confidential and proprietary information, but no less than a reasonable degree of care. Each party further agrees not to disclose the other party's Confidential Information other than to those of its officers, directors, employees, advisors, attorneys, consultants or agents (hereinafter referred to collectively as "Representatives") with a need to know the Confidential Information to any out the purpose of this Letter of Intent and the subsequent Purchase and Sale Agreement.

Offer Duration: This Letter of Intent will automatically expire if Buyer has not received an executed copy bearing both Buyer's and Seller's signature by July 19th, 2013

If the foregoing sets forth an agreeable basis for proceeding, Seller should sign, date, and return to the undersigned the enclosed copy of this letter.

It is expressly understood that this letter of intent is non-binding on both parties and is intended to outline the terms and conditions under which both parties would enter into a Purchase and Sale Agreement for the subject Property. The Purchase Agreement between the parties shall incorporate the general provisions contained herein, and such other provisions as may be agreed to by the parties.

Sincerely,

John Sofro
John Alan Partners

August 15, 2013

Buyer:

Mary Ann

By:
Its:

Seller:

By:

Its:

Dated:

Time:

MEMB
7/18/13

Deleted:

Dated: 7-16-2013

Time: _____

Exhibit A

1. ALTA Surveys
2. Plans and specifications of the project "as built" including floor and site plans.
3. Plans and specifications for any planned improvements not yet complete.
4. An itemized list of all personal property to be included in the sale.
5. Copies of any existing tenant leases and amendments or rental agreements. Statement of all current rents, deposits, advance fees, and delinquencies pertaining to the Property (i.e. the "Rent Roll").
6. Copy of any warranties, maintenance, service, supply, management or other agreements presently in effect, or which may come into effect, of whatsoever natures affecting the Property.
7. Copy of real estate tax bills and assessments for the last year and current year.
8. Current commitment for title insurance from the Title Company, together with the copies of all documents referred to therein and all documents giving rise to exceptions to title.
9. Soil, asbestos, hazardous waste, and Level I and/or any additional environmental assessment reports
10. Licenses, permits, and certificates of occupancy.
11. An aerial photo and other promotional photos if available.
12. Copy of all recent appraisals
13. Copies of historical operating and financial documents regarding the maintenance and management of common area with adjacent property owners including but not limited to CC&Rs, minutes, budgets, year-end reconciliation etc.

Idaho Public Charter School Commission Charter Petition: Facility Details

School Name: Syringa Mountain School	Details for (in order of preference): Option 4
Facility Name / Title: Copper Ranch Clubhouse and Grounds	Option Status: Possible
Location Address: 1970 Woodside Blvd, Hailey, ID & 1.01 Acre Parcel to South	Primary Vendor Information (if applicable) John Sofro John Allen Partners 208-720-5776

Narrative

A total of 2.88 acres with an existing 20,000 sq. ft. shell of a building, as well as an aged metal building that covers three tennis courts and is approximately the same size. The zoning is Limited Business and allows for a school. This means no other entitlement proceedings would need to occur.

The challenge surrounding this location is the cost to finish the building. We have a preliminary estimate of \$1.5 million. Furthermore, we would need to scrap some unfinished foundations on the south portion of the property.

This property would be great, but we defined the status as "Possible" because of the cost of acquisition and completion. A capital campaign would be required to complete the building.

We have discussed this option with the City Planner, Micah Austin, and he sees no impediments to this proposal and thinks this is a great site for the school.

We are in verbal contact with the seller of Copper Ranch, whose asking price is \$799,000 (Seven Hundred and Ninety Nine Thousand Dollars), which we are proposing to pay as the price. Seller financing is not available, so we are proposing to make a 50% down payment and finance the balance with a 20-year mortgage at 5.50%. The site affords sufficient space for temporary

structures if the building is not completed by our opening in September, 2014.

If the building is not completed by our deadline, for facility infrastructure we would lease three double wide mobile classrooms for a period of four years. Each pod is 24x60 feet (1,440 sq. ft.), containing two classrooms and two bathrooms. Three pods will provide six classrooms. Each pod's monthly rate will be \$2,303.00. A detailed description from Specialty Modular is attached.

Fees due to the City of Hailey

Building Permits: \$12,000.00

Impact Fee, \$141.00 per student: \$23,265.00 *

*This fee is appealable under city code 15.16.090.01 and we will appeal it based on the fact that the students coming to the school have already been accounted for in fees previously paid by the Blaine County School District.

Draft Facility Budgets

Pre-Opening Expenses (required)

[Please insert rows as needed]

Description	Qty	Unit Cost	Total Cost	Comments
Down Payment	1	\$399,500	\$399,500	Down payment of 50% of asking price.
Mobile Classroom Installation	1	\$33,240	\$33,240	Delivery, Set-Up, Anchors, Skirting, Foundation Plan for three mobile classrooms
Mobile Classroom Site Preparation	1	\$10,000	\$10,000	
Additional Site Preparation	1	\$30,000	\$30,000	Parking lot, landscaping, etc.

August 15, 2013

Building Permits	1	\$12,000	\$12,000	
Impact Fee	165	\$141	\$23,265	
TOTAL Pre-Opening Costs			\$508,005	

Operating Expenses: Year 1 & Year 2 (required)

[Please insert rows as needed]

Description	Year 1 Qty	Year 1 Unit Cost	Year 1 Total Cost	Year 2 Qty	Year 2 Unit Cost	Year 2 Total Cost	Comments
Mobile Classroom Lease	3	\$2,303	\$82,908	4	\$2,303	\$110,544	Each unit houses 2 classrooms
Debt Service (Principal & Interest)	1	\$2,748	\$32,977	1	\$2,748	\$32,977	D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL Year 1 Costs			\$115,885	TOTAL Year 2 Costs			\$143,521

Operating Expenses: Year 3 (required) & Year 4 or Future Expansion (optional)

[Please insert rows as needed]

Description	Year 3 Qty	Year 3 Unit Cost	Year 3 Total Cost	4 / Exp Qty	Year 4 or Expansion Unit Cost	Year 4 or Expansion Total Cost	Comments
Mobile Classroom Lease	5	\$2,303	\$138,180				Each unit houses 2 classrooms
Debt Service (Principal & Interest)	1	\$2,748	\$32,977				D.L. Evans 20-year mortgage @ 5.5% with 50% down
TOTAL			\$171,157	TOTAL Year 4 or			

Year 3 Costs		Expansion Costs	

List of Attachments

Attachments (required)

[Please insert rows as needed. List all documents related to this facility's location, costs, etc.]

Attachment Title	Brief Description	Notes or Considerations
Copper Ranch OM	Offering Memorandum	
Plat Site Aerial	Plat Site Aerial	
County Tax and Legal Description		
Former MLS Listing Information		
LOI between parties	Letter of Intent to be attached at later date	

THE CLUB AT COPPER RANCH



HAILEY, IDAHO

BUSINESS OPPORTUNITY

FOR SALE OR LEASE

EXCLUSIVELY OFFERED BY:

JOHN ALAN

PARTNERS

JOHN SOFRO, BROKER

OFFICE 208.726.3411 OR CELL 208.720.5776

540 SECOND AVUNUE NORTH, SUITE 101, KETCHUM, IDAHO 83340

The Club at Copper Ranch is a multipurpose health club constructed on a 1.82 acre parcel within the project known as the Condominiums at Copper Ranch; a 135 unit PUD in Hailey, Idaho (see attached description of the Condominiums at Copper Ranch). The Club is currently under construction and is approximately 70% complete. The Clubs' design is by Dale Bates of the award winning architecture firm, Living Architecture in Ketchum, Idaho; a leader in environmental, green and healthy architecture. The two-story facility, upon it's completion, will include 3 indoor tennis courts; a 4 lane 25 meter salt water pool and spa. The main level will have a free weight and circuit training area; daycare facility; Pilates studio; locker rooms with steam rooms; fitness testing area; a pro-shop for the tennis courts and a snack bar. The second level includes two multi-purpose fitness studios for spin classes, yoga and group fitness/aerobic classes and a cardio fitness and stretching area.



Dale Bates of Living Architecture describes the club as an “environment that inspires, energizes and supports health from the ground up... a truly healthy health club.” To improve air quality and a reliance on artificial light the club has been designed with extensive skylights and windows to flood the workout rooms with natural light, operable windows and a mechanical system that provides abundant fresh air. The club also utilizes select building materials and finishes free of toxic off-gassing. The Club at Copper Ranch will be a facility that any community would be proud of.



**Healthy and Environmental Construction Features:
(Provided by Living Architecture)**



**CLUB AT COPPER RANCH
HEALTHY AND ENVIRONMENTAL FEATURES**

- **Super Energy Efficient Building**
 - 12" European breathing walls on exterior, this is high performance recycled wood chip insulated concrete form
 - Performance cellulose and foam insulation for superior efficiency
 - Solar ready for future hook-up of a solar thermal system to heat hot water
 - Atrium skylights in workout space, Solatubes in Pool, Yoga and Aerobics areas to provide abundant natural day lighting
 - Slab on grade foundation with natural pumice insulation
 - Low flow showers and plumbing fixtures
 - Waterless urinals
 - All energy-star appliance and lighting fixtures
- **Superior Indoor Air Quality/ Healthy Interiors**
 - Designed by Living Architecture, top 3 Green Architecture firms in the United States
 - 0 VOC non-toxic paints, stains, finishes and adhesives
 - Formaldehyde free cabinets and lockers
 - Cork, linoleum and natural rubber flooring materials
 - Healthy salinated pool and spa system, no chlorine
 - Bamboo lockers
 - Integrated indoor planters for clean air
 - Interior water fountain for natural interior ionization and humidification
 - Operable windows for natural ventilation
 - Whole building water purification system
- **Durability**
 - 12" European breathing walls on exterior, 100 year product
 - True stucco exterior finish, 100 yr product

Improvement Description:

Building type:	Multipurpose Health Club	
Number of Stories:	2	
Size (square feet):	Tennis courts:	21,870
	Health club first floor:	14,263
	Health club second floor:	5,734
	Storage Area:	385
		<hr/>
		20,382
	Entire Facility	42,252

Building Configuration:

Tennis Courts:

The tennis court structure is framed by steel I-beams and sided with corrugated metal siding and a metal, pitched roof. The interior is finished with plastic sheathed insulation, three tennis courts and a small office area and pro shop. The courts are lit by fluorescent light fixtures. There are no windows and the ventilation is provided by roof-level mechanical vents. Upgraded ventilation will reportedly be added. The tennis courts were resurfaced in recent years and are considered to be in good condition. The exterior of the building has some deferred maintenance in the form of dented metal panels and aged painted surfacing. These items of deferred maintenance will reportedly be corrected as the construction and renovation continues.

Health Club:

The health club is presently under construction and is estimated by the contractor, Young Construction, to be about 70% complete. The structure is built on a cement slab foundation. Interior and exterior walls are predominantly constructed of durisol blocks which are a cement and wood chip composite material. External durisol walls will be surfaced with cement based colored stucco and internal durisol walls will be finished with gypsum plaster with integral color. Some interior walls will be wood framed with painted (non V.O.C. paint) drywall surfacing.

Much of the club will have natural light from atrium skylights over the main weight room and Solatube style skylights in the yoga and aerobics rooms. Additional lighting fixtures include recessed cans, surface mounted fixtures, wall sconces and specialty chandeliers. The pool area will have metal halide ceiling hung lights and solatubes.

Interior flooring will include: a textured concrete pool deck, carpeted and tiled locker rooms, sprung wood and carbonic heated wood floors in the second floor exercise studios, linoleum flooring in the weight and cardio areas of the club, linoleum and tile in the childcare area and integral colored concrete in the lounge area.

The roof is sloped and constructed of premanufactured wood trusses with 30 year Class A composition shingles. Windows will be Pella Pro line series aluminum framed throughout the club and Pella fiberglass Impervia double windows in the pool area. The facility will also be wired and plumbed to receive solar collection panels in the future. The health club will have gas forced air heat and air conditioning and the pool area will have forced air heat, dehumidification and air conditioning. A 6 X 8 elevator will service the second floor. Fire protection will be provided by an automatic sprinkler system in the club, pool and all exterior covered areas.

Neighborhood Description:

The subject property is located in the southeast area of Hailey that is commonly referred to as Woodside. Woodside is comprised of predominantly residential uses and to a lesser extent, industrial uses. The residential inventory includes single family, townhome and multi-unit residences. The subject is located approximately 1 ¾ miles driving distance from Hailey's central core. The Wood River High School is approximately 1 mile to the north and the community bike path which connects Bellevue, Hailey, Ketchum and Sun Valley is less than ¼ mile to the west.

Specifically, surrounding land uses include:

- To the north, east and south- Woodside subdivision, mostly single family residences
- To the west- Desert Sage Townhomes, Snow Mountain Apartments and Baldy View Apartments
- Immediate area-the Copper Ranch condominiums

Location characteristics for the subject are considered good with convenient driving access to all of Hailey. For the commercial nature of the property a location with better exposure and access would be more desirable.

Zoning:

The subject was zoned LB, Limited Business however the overlying zoning is for a Planned Unit Development (PUD) which also includes the development of the Copper Ridge Condominiums in addition to the health club. The zoning in the surrounding neighborhood is predominantly GR – General Residential.

Flood Zone:

With regard to the subject's flood zone status; it lies primarily in Zone X, which is considered outside of any designated flood zone hazard. Additionally, there is a strip of zone AH land on the western boundary that runs the length of the east side of Woodside Boulevard. This zone is designated as flood depths of 1 to 3 feet (usually areas of ponding) as indicated by FEMA's flood maps (panel #1651670668B, 3/17/97). This would appear to be a typical drainage ditch for road run-off.

Legal Description:

The following legal description was obtained from the Blaine County Assessor's Office:

Copper Ranch No. 5 Parcel B1, Hailey, Blaine County, Idaho

Site Description:

The subject site is level at street grade and is generally rectangular in shape having 81,305 square-feet (1.87 acres) of total land area. The site has 142.74 feet of street frontage on the east side of Woodside Boulevard and an average depth of approximately 272 feet to the east. Water, sewer, gas, electric, and telephone utilities serve the subject property. A plat is contained in the addenda (site is indicated as Parcel B1).

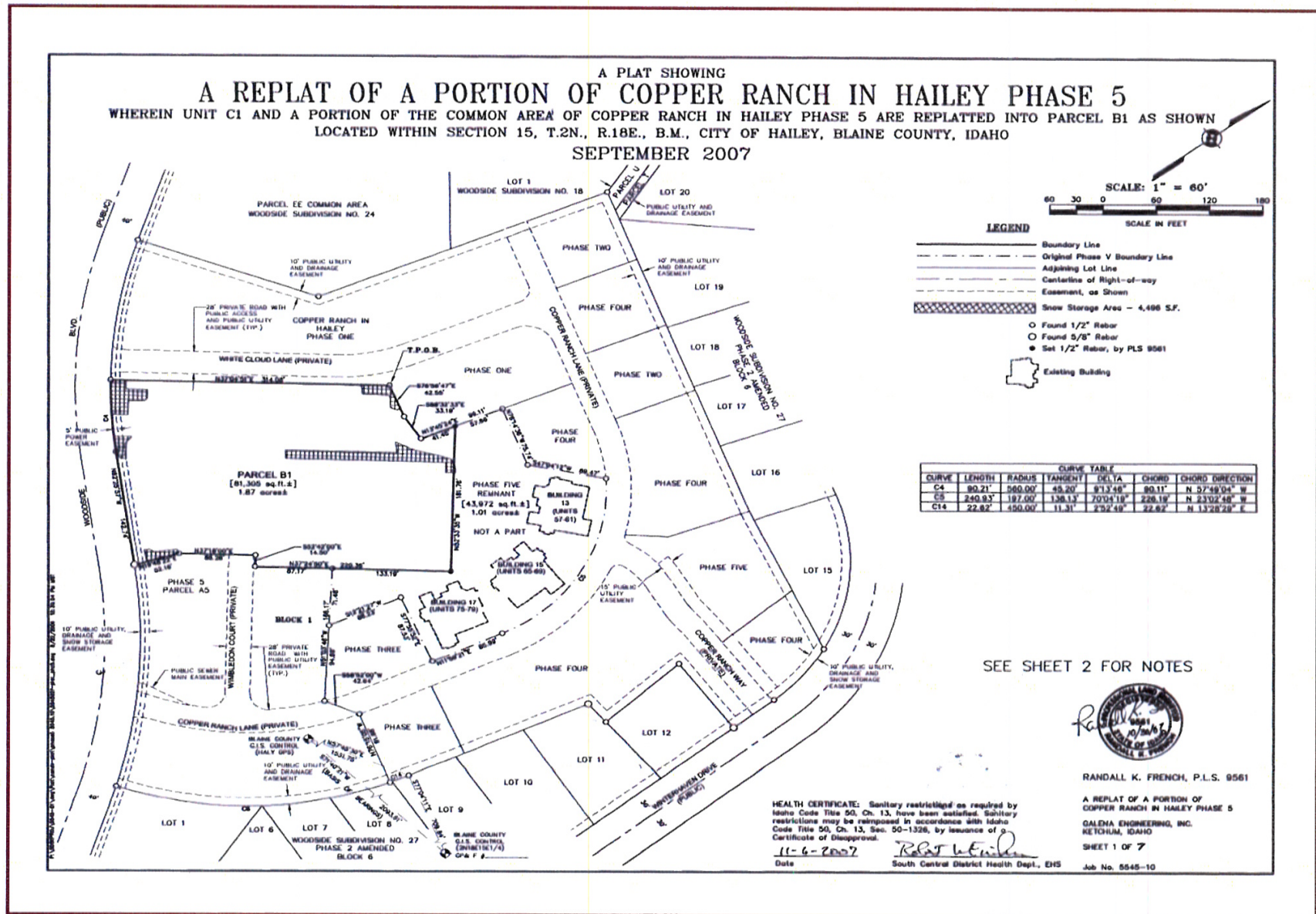


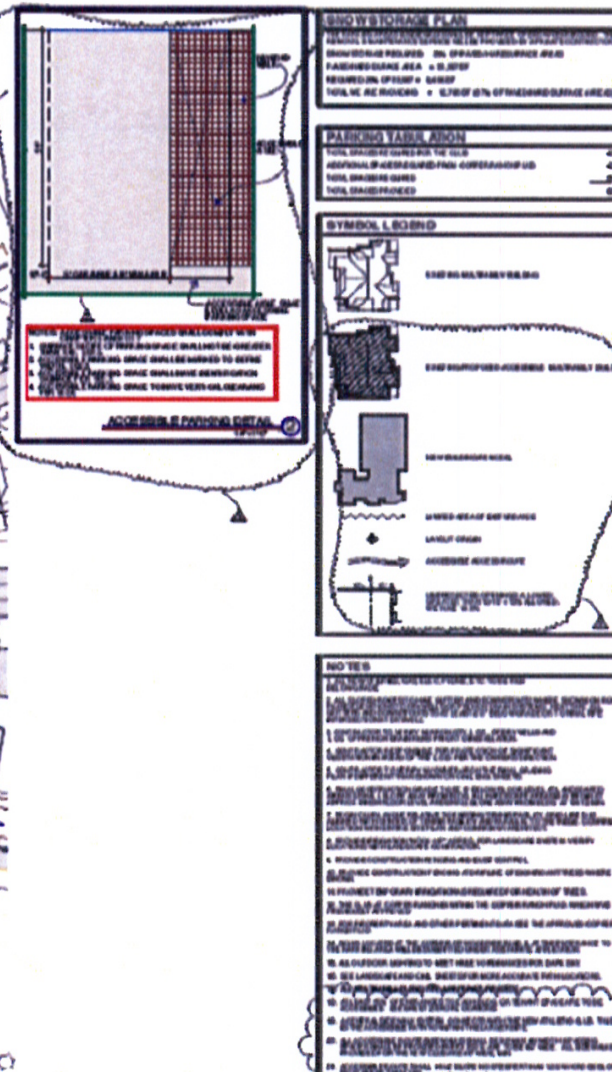
This information is to be used ONLY for reference purposes and Blaine County is not responsible for any inaccuracies. 2009

The Club at Copper Ranch

JOHN ALAN

PARTNERS





Two additional fall back positions are briefly outlined in the two emails that follow.

In the case that any of the permanent site options are not operational by the start of the school opening, the SMS Board is prepared to exercise either or both of these options:

Leasing the closing private school campus on a short term basis to have access to the garden/farm environment and some limited classroom space;

Leasing an office building in conjunction with the farm/garden to ensure the full proposed curriculum can be delivered regardless of the school location.

Subject: 100 mustang lane lease memo

From: Katharine Woods (kwoods@themountainschool.info)

To: Marymgervase@yahoo.com;

Date: Monday, July 15, 2013 4:48 PM

Hi Mary,

Here is the memo on leasing 100 mustang lane, in necessary.

All the best,

Kate

Memo on Leasing 100 Mustang Lane

The following memo details the terms and conditions of a lease of the site and facilities located at 100 Mustang Lane, Bellevue, ID ("Lease") by Katherine Woods to Syringa Mountain School ("SMS").

Katherine Woods is willing to offer the Lease to SMS under the following terms and conditions:

(1) Facilities, all currently utilized by The Mountain School:

(a) School Building, 2,000 sq. ft.

(b) Office, 400 sq. ft.

(c) Pre School Room, 300 sq. ft.

(d) Farm Yard, Garden, Playground, 1/2 acre

(e) Parking Lot

(2) Will lease all facilities on a year-to-year basis

(3) Annual/Monthly rental rate equal to the market rate.

(4) SMS will pay all utilities and insurance

Your truly,
Katharine Woods

Katharine Woods
100 Mustang Lane
Bellevue, ID 83313
(208) 720-4883

kwoods@themountainschool.info

Subject: FW: 406 N. Main Lease offer

From: Greg Bloomfield (gregb@woodriverinsurance.com)

To: Marymgervase@yahoo.com;

Date: Monday, July 15, 2013 9:53 AM

Hi Mary- Please see below.

Thanks,

Greg Bloomfield

gregb@woodriverinsurance.com

Ph: 208.788.1100 Ext. 14



410 N. Main St.

Hailey ID, 83333

Fax: 208.788.4988

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From: Matt Bogue [mailto:matt@kenny-bogue.com]
Sent: Monday, July 15, 2013 9:22 AM
To: gregb@woodriverinsurance.com
Subject: RE: 406 N. Main

Hi Greg,

August 15, 2013

Thanks for the call. Here are the details on 406 N. Main Street.

Front building: 1,860sf

Back building: 1,728sf

Lot size: 7,184sf

Front building needs significant work to return to 'shell' condition, and owner is willing to have the work performed.

Asking rent for entire premises is \$2,200/month + all utilities (water, sewer, trash, power, gas, cable/phone).

I represent the owners of the property, and am in a position to assist in negotiating a lease on their behalf.

I'll call you tomorrow when I'm free (around 10am).

THANKS,

Matt

Matt Bogue, CCIM

PAUL KENNY & MATT BOGUE COMMERCIAL REAL ESTATE

200 W. River Street, Suite 301 | PO Box 5102 | Ketchum, ID 83340

Office (208) 726-1918 | Mobile (208) 720-7948 | Fax (208) 726-1990

matt@kenny-bogue.com | www.kenny-bogue.com

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<http://us-mg5.mail.yahoo.com/neo/launch?.rand=bp2hblv9teeh7>

7/15/2013

APPENDIX L Pre-opening Timeline

Idaho Public Charter School Commission

Charter Petition: Pre-Opening Timeline

Instructions

- A. Please provide details about all pre-opening tasks by completing the following tables. Insert rows as needed.
- B. Tasks should be organized by "Start By" date or "Complete By" date.
- C. "Category" should be identified as one of the following:
- Board Governance
 - Enrollment / Lottery
 - Facilities
 - Fiscal Management
 - Fundraising
 - Human Resources
 - Marketing and PR
 - Other

In order to prepare for the opening of Syringa Mountain School in the fall of 2014, the Directors will accomplish the following goals. It is assumed at least a part time principal will be hired to manage and lead this process. The principal will serve on all committees. Each committee is chaired by a Board of Director. Board of Directors and Founders Board are one and the same for this purpose.

Phase 1: Immediately after Receiving Charter

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Advertise and hire principal	Board of Directors	Board Chair		
	Advertise and contract for fiscal services	Board of Directors	Board Chair and Principal when hired		
	Advertise and contract for legal services	Board of Directors	Board Chair and Principal when hired		
	Join ISBA and Charter School Network	Board of Directors	Principal		
	The Board of Directors will receive training in preparation for their fiscal and policy responsibilities including open meetings law, parliamentary procedure, effective meeting strategies, role of a board member, governing vs. managing, policy	Board of Directors	Board Chair and Principal		

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	development, fiscal controls, Idaho Open Meeting Law, etc. Schedule board meetings. Training will be provided by the ISBA and the Charter School Network.				
	Secure SDE passwords and ensure SDE communication.	Board of Directors	Principal		
	Obtain Board liability insurance	Board of Directors	Board Chair and Principal		
	Practice formal meetings under Open Meetings Act.	"	"		
	Finalize agenda and minutes formats.	"	"		
	Identify Board roles, I.E. Secretary	"	"		
	Begin publishing minutes on the website.	"	"		
	Finalize Board development plan, including Waldorf education trainings.	"	"		
Marketing and PR	Develop marketing campaign	PR Committee	Committee Chair and Principal		
	Online enrollment translated into Spanish and then activated on website	PR Committee	Principal		
	Press release announcing authorization and matching grant of \$500,000	PR Committee	Committee Chair and Principal		
	Press release announcing Albertson grant of \$250,000	PR Committee	Committee Chair and Principal		
	Notification of the State Board of Education of such approval, seeking authorization to begin operations for the 2014-2015 school year. Seek authorization for LEA status.	Board Chair, Principal	Principal		
	Public meeting and media announcements to inform the public of authorization decision, enrollment procedures, and advantages of SMS as an education choice.	PR Committee and Board of Directors	Committee Chair and Principal		
Enrollment	Document efforts to inform public of enrollment opportunities, including LEP students.	PR Committee	Principal		
	Prepare for transition between intent to enroll and enrollment.	Principal	Principal		

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	Include language survey on enrollment form.	"	"		
	Develop enrollment form and translate into Spanish.	"	"		
	Post on website	"	"		
Facilities	Finalize site recommendations and report to the Board of Directors. Board of directors votes on site decisions.	Site Committee/Board of Directors	Committee Co-Chairs and Principal		
	Begin work to contract facilities design if needed or facility installation if portables.	"	Committee Co-Chairs and Principal		
	Negotiate lease.	"	Board and principal		
	Sign lease.	"	"		
	Secure financing.	"	"		
	Perform renovations.	"	"		
	Pass final inspection and receive occupancy certificate.	"	"		
	Obtain property insurance	"	"		

Phase 2: 6 to 9 Months before Opening (December)

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Continue to monitor Administrator actions and provide support as needed.	Board of Directors	Board Chair	December	Ongoing
	Post calendar on website	Board of Directors	Principal	December	December
	Finalize list of all policies that need to be create before school opening.	"	"	"	March
	Develop Board Calendar	"	"	"	"
Fiscal management	Begin to order instructional materials, supplies, furniture	Finance Committee	Fiscal Contractor and Principal	December	August
	Ensure that bids and expenses to open the school remain within budget.	Finance Committee	Fiscal Contractor and Principal	Ongoing	Ongoing

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	Develop report calendar (see SDE)	Finance Committee	Fiscal Contractor and Principal	December	December
	Update enrollment as new students enroll.	Finance Committee	Principal	Ongoing	Ongoing
	Finalize/review fiscal controls and financial policies the school will employ to track daily operational finances.	Fiscal Contractor and Principal	Fiscal Contractor and Principal	December	March
	Review signature policies.	"	"	"	"
	Review/design process forms: purchase orders, expense forms and policy.	"	"	"	"
	Finalize financial reporting templates and policy (budget and actual)	"	"	"	"
	Retain/maintain ongoing dialogue with Fiscal Contractor	"	"	"	"
	Hire/contract for an accountant	"	"	"	"
	Decide on internal accounting system	"	"	"	"
	Purchase accounting software	"	"	"	"
	Develop segregation of funds policy (public vs private)	"	"	"	"
	Establish payroll	"	"	"	"
	Define investments/savings strategy (allocation of excess funds)	"	"	"	"
	Develop cash flow plan (dialogue with banks about lines of credit)	"	"	"	"
	Obtain insurance policies.	"	"	"	"
Marketing and PR	Implement monthly information meetings.	PR Committee	Committee Chair and Principal	Monthly	Monthly
	Implement marketing campaign	PR Committee	Committee Chair and Principal	December	June 2015
Facilities	Complete facility design with an architect in order to meet all design requirements for the facility.	Site Committee	Committee Co-Chairs and Principal	ASAP	February
	Finalize plan to bring city utilities to the site if needed.	Site Committee	Committee Co-Chairs and Principal	ASAP	February
	Advertise bidding process for all contracts	Site Committee	Committee Co-	ASAP	February

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	requiring bids.		Chairs and Principal		
	Make sure that all relevant building permits are secured	Site Committee	Committee Co-Chairs and Principal	ASAP	February
	Work with the city to schedule planning and zoning committee hearing, seek a conditional use permit for the property.	Site Committee	Committee Co-Chairs and Principal	ASAP	February
Human resources	Advertise for faculty and staff positions.	HR Committee	Committee Chair and Principal	December	Ongoing
	Finalize salary schedule and benefits package.	HR Committee	Committee Chair. Fiscal Contractor and Principal	December	December
	Design interview process	"	"	"	"
	Create various "form letters" including contract letter, salary and benefits information sheet.	"	"	"	"
	Finalize staff handbook	"	"	"	"
	Interview and hire potential applicants.	HR Committee and Board of Directors	Committee Chair and Principal	December	Ongoing
	Negotiate and sign agreements for contracted services.	"	"	"	"
Other	Finalize handbook. Must it be adopted by board	Principal	Principal and Board of Directors	December	March
	Finalize curriculum	Principal	Principal	December	March
	Collaborate with community organizations	"	"	Ongoing	Ongoing
	Contact and maintain relationship with Head start, and preschools	"	"	Ongoing	Ongoing
	Set up non-profit mailing status with Post Office				

Phase 3: 3 to 6 Months before Opening (February)

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Continue to monitor Administrator actions and provide support as needed.	Board of Directors	Board Chair	Ongoing	Ongoing

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	Determine Founders Preference List	Board of Directors and Principal	Board Chair	March	March
	Conduct Lottery	Board of Directors and Principal	Board Chair	April	April
Fiscal Management	Secure insurance policies (liability, property, worker's compensation, etc.).	Committee and Contractor	Fiscal Contractor and Principal	February	May
	Complete contracts for all contracted services such as transportation, food service, special ed. services, IT support, student information system, etc., and/or fiscal support services such as accounting, budget, payroll, banking, auditing, and purchasing.	Committee and Contractor	Fiscal Contractor and Principal	February	May
	Continue to monitor expenses and ensure that the school's expenses remain within budget.	Committee and Contractor	Fiscal Contractor	Ongoing	Ongoing
	Secure telecommunications services	Committee and Contractor	Fiscal Contractor and Principal	February	March
Facilities	Continue progress on facilities	Committee	Committee Chair	Ongoing	Ongoing
Enrollment	Continue to advertise and seek enrollment	Principal and Administrative Assistant	Principal	Ongoing	Ongoing
	Update enrollment as new students enroll.	Principal and Administrative Assistant	Principal	Ongoing	Ongoing
	Practice lottery protocol	Board of Directors and Principal	Board Chair	March	March
	Conduct admissions lottery	Board of Directors and Principal	Board Chair	April	April
	Notify families of status	Principal	Principal and Administrative Assistant	May	May
	Establish wait list	Principal	Principal and Administrative Assistant	May	Ongoing
	Confirm acceptances	Principal and Administrative Assistant	Principal and Administrative Assistant	May	Ongoing
Human Relations	Advertise and hire office staff-part time initially	Principal and HR Committee	Principal	February	February
Other	Complete school calendar, school hours, and staff contracts.		Principal and Administrative	Ongoing	Ongoing

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			Assistant		
	Set up OpenSIS for the school.		Principal	February	July
	Develop student attendance reporting system		"	"	"
	Develop/purchase student data base I.E. Mileposts		"	"	"
	Develop procedures and form to track and monitor visitors.		"	"	"

Phase 4: 0 to 3 Months before Opening (May)

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Fiscal Management	Revisit budgets and assumptions, and revise as needed.	Fiscal Contractor	Fiscal Contractor and Principal	Ongoing	Ongoing
	Hold annual public budget hearing.	Board of Directors	Fiscal Contractor and Principal	June	June
	Develop a fund development strategy.	Board of Directors and Fiscal Contractor	Fiscal Contractor and Principal	June	August
	Lease or purchase any office equipment.	Fiscal Contractor	Fiscal Contractor and Principal	June	June
	Arrange for Fiscal and Programmatic Audits for the following school year.	Fiscal Contractor	Fiscal Contractor	June	June
	Have procedures in place for receiving donations and student fees.	Fiscal Contractor	Fiscal Contractor	June	July
	Continue to monitor expenses and ensure that the school's expenses remain within budget.	Fiscal Contractor, Board of Directors	Fiscal Contractor	Ongoing	Ongoing
Marketing and PR	Send out press releases about the opening of the school.	Principal and Administrative Assistant	Principal and Administrative Assistant	May	August
	Announce on the website if there are any openings for students and the available grades.	Principal and Administrative Assistant	Principal and Administrative Assistant	May	August
	Hold open houses	Chair and Staff	Chair and Principal and Staff	May	May 2015

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Enrollment	Collect enrollment packets. Perform lottery and notify applicants on or before April 30, 2013.	Board Chair	Principal and Administrative Assistant	May	May
	Continue to advertise and seek enrollment.	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
	Update website on student openings and available grades	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
Facility	Continue progress on facilities	Committee	Committee Chair		
	Finish facility set up.	Principal and Administrative Assistant	Principal and Administrative Assistant	June	July
	Take delivery of school equipment and supplies.	Principal and Administrative Assistant	Principal and Administrative Assistant	June	July
	Set up classrooms and office equipment and supplies.	Principal and Administrative Assistant	Principal and Administrative Assistant	June	July
	Ensure that the facility has adequate HVAC, lighting, and space.	Principal and Administrative Assistant	Principal and Administrative Assistant	May	August
	Ensure the grounds are safe and well maintained.	Principal and Administrative Assistant	Principal and Administrative Assistant	May	August
	Arrange for grounds care and snow removal.	Principal and Administrative Assistant	Principal and Administrative Assistant	June	August
	Finish city inspections such as fire and health, and obtain a certificate of occupancy.	Principal and Administrative Assistant	Principal and Administrative Assistant	May	July
	Post fire exit maps in all occupied spaces.	Principal and Administrative Assistant	Principal and Administrative Assistant	July	August
Human Resources	Finish hiring faculty and staff and sign employee contracts	Committee and Principal	Principal and Administrative Assistant	Ongoing	Ongoing
	Ensure all teachers hold valid Idaho teaching certificates for the grades they teach and that these are on file in their personnel files 33-5205(4)(g) and 33-5206(4).	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing

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	Ensure all teachers are highly qualified according to the NCLB or that they have waivers from the State Department of Education	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
	Ensure staff contracts are written in the form approved by the State Superintendent of Public Instruction 33-5206(4).	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
	Ensure that criminal background checks have been completed for all employees 33-5210(44)(d) (consider background checks for volunteers).	Principal and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
	Enroll all staff in PERSI	Fiscal Contractor and Administrative Assistant	Principal and Administrative Assistant	Ongoing	Ongoing
	Provide social security, unemployment insurance, worker's compensation insurance and health insurance for all staff [33-5205(3)(m)].	Fiscal Contractor and Administrative Assistant	Fiscal Contractor	Ongoing	Ongoing
	Ensure that up-to-date and accurate personnel files that contain only appropriate information have been created for all staff.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
	Ensure that all paraprofessionals working in an instructional capacity meet the requirements of State Paraprofessional Standards and Federal NCLB requirements.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
	Provide emergency preparedness training to all personnel.	Principal and Administrative Assistant	Principal	August	August
	Provide procedures for emergency closure before, after, and during school.	Principal and Administrative Assistant	Principal	June	August
	Establish fire drill procedures and schedule fire drills.	Principal and Administrative Assistant	Principal	June	August
	Identify first aid resources				
	Complete school policy handbook for employees that details policies and procedures.	Principal and Administrative Assistant	Principal	May	May

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	Develop school safety manual and or health and safety policies and emergency procedures handbook.	"	"	May	May
	Finish and publish student handbook.	Principal and Administrative Assistant	Principal	May	May
	Finish obtaining immunization records for all enrolled students.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
	Acquire student medical and health forms,	"	"	"	"
	Obtain Internet policy agreements signed by all students and their parents.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
	Collect all existing IEPs.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
	Ensure that all personnel files are up-to-date and contain only appropriate information.	Principal and Administrative Assistant	Administrative Assistant	Ongoing	Ongoing
Other	Arrange for pre-opening professional development.	Principal	Principal	May	August
	Conduct pre-opening professional development and staff orientation meetings	Staff	Principal	August	August
	Schedule and conduct home visits	Staff	Staff	August	August
	Inventory and distribute all textbooks, materials, and supplies to teachers.	Administrative Assistant	Administrative Assistant	July	August
	Develop IEP's	Principal and Staff	Principal and Staff	Ongoing	Ongoing
	Identify ELL students	Principal and Staff	Principal and Staff	Ongoing	Ongoing
	Activate child study teams	Principal and Staff	Principal and Staff	Ongoing	Ongoing
	Write and mail family letter regarding Parent Orientation	"	"	"	"
	Review and finalize curriculum	"	"	"	"
	Review and finalize academic goals for students achievement and school performance	"	"	"	"
	Review and finalize assessment strategy and timeline.	"	"	"	"

August 15, 2013

	Finalize teacher conferences plan	"	"	"	"
	Write and submit grant proposals to national, state and local foundations and organizations	Principal and staff	Principal and Staff	Ongoing	Ongoing
	Organize fundraising activities	School community	Principal	"	"

APPENDIX M Staff Professional Development, Evaluation

Professional Development

SMS recognizes that teachers provide the heart of our school program, helping students at Syringa Mountain School achieve their potential academically, socially/emotionally, and in terms of physical ability (fine and gross motor skills). Teacher success is the basis for successful student learning. SMS intends to support its teachers through increasingly competitive compensation packages, generous preparation time, opportunities for peer connection and support, and a strong mentoring and professional development program. SMS recognizes the critical importance its professional development programs play in the long-term success of the school. As a public charter school inspired by Waldorf education, we recognize that early and ongoing training will have a direct impact on achieving our curricular vision, as well as meeting the requirements issued to all public schools in Idaho. These two objectives will frame our approach to professional development.

SMS Annual Professional Development Program Features:

Annual Summer Institute - Prior to the beginning of each year, SMS will send teachers to customized training out of state. Each teacher enrolls in an intensive two week training to prepare them for the grade level they will be teaching in the fall. As teachers typically loop with their students and thus teach a new grade each year, this training is provided at a number of U.S. Waldorf institutions every summer.

1. Ongoing education during the school year will be provided for all staff to focus on achievement planning, integrated curriculum mapping of state standards, assessment analysis, and program evaluation and enhancement planning.
2. Ongoing education during the school year will include developing the teaching skills of our Waldorf inspired learning environment. Teachers will train in areas of specific intervention strategies, Waldorf literacy and numeracy methodologies, classroom culture, professional collaboration, and school-wide program and curriculum roll out. This training will also include artistic instruction for teaching purposes. This will be accomplished through guest speakers and mentors. When appropriate, evening sessions will be held and open to the parents and/or public.

Annual Professional Development Plans

1. The core component of a SMS teacher's professional development is a highly customized individual growth plan. These plans will be reflect the long-term and short term nature of the

growth cycle, be validated by a support team, tied to multiple growth indicators, and reflect SMS values, strategic goals and student outcomes.

2. Teachers will be officially and unofficially observed frequently by their peers, mentors, and the school's Principal.

3. Staff and grade level meetings - Each year all teachers will be required to participate in 22 hours of professional development hours during the school year.

Other Program Details

SMS will utilize a "Train the Trainers" approach whenever appropriate by providing key individuals with specific interests and expertise, with the opportunity to bring proven strategies to SMS. Time to share new methods or strategies will be included in as part weekly staff and grade level meetings. We expect this strategy to produce quality development with important cost savings.

Prior to the start of the school year and throughout the year, staff will receive training in the following areas:

Student Information System

School handbooks and procedures including discipline, safety, communication

State Assessment requirements and use of results to improve student achievement

School assessment procedures and use of results to improve student achievement

Waldorf-inspired curriculum as it relates to the Idaho Core Standards and State Standards

Assurances

Assurance: Syringa Mountain School will meet all of the Idaho assurances as required by the AMERICAN RECOVERY AND REINVESTMENT ACT OF 2009 (ARRA) and in regard to teacher and principal evaluation. SMS will be in compliance with these assurances, recording the required information into ISEE, known as the Idaho System for Educational Excellence (ISEE). It is understood that SMS must make teacher and principal evaluation model and policies available to the public via the State Department of Education website. Additional information will be provided to the SDE

- Data on whether or not Idaho school districts and public charter schools use student achievement outcomes or student growth data as an evaluation criterion in teacher and principal evaluations.
- The percentage of teachers at each performance rating or level in the performance evaluation.
- The percentage of principals at each performance rating or level in the performance evaluation.

While school districts and public charter schools will be required to submit data for all teachers and principals currently employed, the State Department of Education will ensure the privacy of Idaho teachers and principals is protected, in accordance with Idaho Code 33-518 and IDAPA 08.02.02.120. To ensure this privacy, teacher and

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principal information will be reported in aggregate only and will not be reported publicly for districts or public charter schools with fewer than five (5) teachers or five (5) principals. IE

Is the Teacher Evaluation Complete? yes/no	
If yes, what was the overall rating of this individual teacher's performance? Distinguished (or district equivalent)	Proficient (or district equivalent)
Unsatisfactory (or district equivalent)	
Expected date of Evaluation to be completed	Is the Principal Evaluation Complete?
If yes, what was the overall rating of this principal's performance?	
Proficient (or district equivalent)	
Unsatisfactory (or district equivalent)	
Expected date of Evaluation to be completed	Does Teacher Evaluation use student achievement outcomes or student growth data as an evaluation criterion?
Does Principal Evaluation use student achievement outcomes or student growth data as an evaluation criterion?	

Administrator Evaluation Policy, Standards, Timeline, Rubric,

PRINCIPAL EVALUATION POLICY

Purpose

This policy sets forth guidelines and directions related to Principal evaluation. The SMS Principal is evaluated each year beginning with the selection of the Principal evaluation committee in January and ending with a contract recommendation in March.

Statutory Requirements

There shall be a minimum of one (1) written evaluation in each annual contract year of employment, the first portion of which shall be completed before March 1 of each year and shall include input from parents and guardians of students as a factor. A second portion shall be included for all evaluations conducted after June 30, 2012. This second portion shall comprise at least fifty percent (50%) of the total written evaluation and shall be based on objective measure(s) of growth in student achievement. The requirement to provide at least one (1) written evaluation does not exclude additional evaluations that may be performed. No civil action for money damages shall arise for failure to comply with this subsection. (Idaho Code 33-513, 33-514 and 33-515)

Idaho Code

To employ assistant superintendents, directors, principals and other district administrative employees for a term not to exceed two (2) years. A teacher holding renewable contract status in Idaho pursuant to section 33-515, Idaho Code, immediately previous to such administrative employment shall retain such eligibility. The superintendent, the superintendent's designee, or in a school district that does not employ a superintendent, the Board of Directors, shall conduct an annual, written evaluation of each such employee's performance. For all evaluations conducted after June 30, 2012, at least fifty percent (50%) of the evaluation shall be based on objective measure(s) of growth in student achievement, as determined by the Board of Directors. In addition, input from the parents and guardians of students shall be considered as a factor in the evaluation of principals and any other school-based administrative employees' evaluation. (Idaho Code 33-513)

Definition

For the purposes of this document, principal is defined as all certificated staff members who are employed as a principal or assistant principal.

Statement of Purpose

The evaluation shall be conducted with each principal to provide services as follows:

1. Inform each principal of how he or she is performing in his or her assignment.
2. Communicate to each principal both his/her strong and weak points and areas where improvement, if any, is needed from a variety of stakeholders perspectives.
3. Create an opportunity for the evaluator and the principal to discuss objectively the employee's job performance and mutually agree upon goals and objectives.

Provide the following information to a principal whose performance necessitates the imposition of probation or nonrenewal of contract:

1. Written notice of the specific areas of unsatisfactory performance.
2. A reasonable time period to make corrections.
3. Adequate supervision, assistance, and evaluation during the period of probation.

All monitoring or observation of the performance of a principal shall be conducted openly and with full knowledge of the employee.

The Principal Evaluation Committee

The committee consists of Board of Directors appointed members:

- One faculty representative nominated by the faculty
- One parent representative nominated by the parent representatives
- The Board of Directors President

The full Board of Directors ratifies the nominations.

Process

The evaluation process is overseen by the committee in accordance with the timeline indicated below. The committee solicits feedback as to the performance of the Principal from the following groups or individuals:

- Board of Directors
- Faculty
- Parents
- Students as appropriate

The feedback is collected using the following form. Student feedback may be solicited through survey, interview, or focus group as determined by the Board and principal. In addition to the form below, additional written comments may be submitted by way of a separate letter. The Board of Directors President is responsible for the solicitation of input from the groups and Individuals' indicated above. In order to assure anonymity and confidentiality, the evaluation forms are to be read only by evaluation committee members.

Timeline

- Early January: The committee is organized and the Principal submits a self-evaluation using the Principal Evaluation Form.
- Mid January: The Board of Directors' President meets with the groups and explains how feedback is to be submitted.
- Late February: The committee collects the Principal Evaluation Forms, analyzes the forms and prepares its findings. The findings are discussed with the Principal who may choose to respond to the findings. The committee notes the response from the Principal, if any, and prepares a final summary of findings.

- Early March: The committee, in closed session, presents its final summary of findings to the Board of Directors without the Principal in attendance.
- The Board makes a recommendation based on one of the following:
 - Rehire the Principal with a salary recommendation
 - Rehire the Principal with conditions
 - Place the Principal on administrative leave pending further action
 - Non-renewal of contract
- The Board, in closed session, discusses the recommendation with the Principal who may choose to respond to the recommendation.
- The Board notes the response from the Principal, if any, and approves a final recommendation.

Concerns

Any concerns that fall outside of the regular evaluation process as described herein should be brought to the attention of the Board of Directors President. During the regular course of the year, the President is a conduit for feedback to the Principal regarding such concerns. An additional evaluation may be required at any time by a majority vote of the Board of Directors.

Framework

The principal evaluation process is based upon the *Principal Leadership Competencies* (Kim Marshall) which centers on six domains.

DOMAIN A: Diagnosis and Planning

DOMAIN B: Priority Management and Communication

DOMAIN C: Curriculum and Data

DOMAIN D: Supervision and Professional Development

DOMAIN E: Discipline and Family Involvement

DOMAIN F: Management and External Relations

Performance Continuum

The continuum ranges from describing principals who do not meet the standard to highly accomplished professionals who are able to share their expertise and effectively lead the staff to accomplish District/school goals.

1. Performance is clearly unacceptable and needs to change immediately.
2. Performance has real deficiencies and is not entirely successful. The principal appears to understand the concepts underlying a component but implementation is sporadic, intermittent or

otherwise not entirely successful.

3. Performance is solid and is the expected performance for a principal. The principal understands the concepts and practices underlying each component and leads it well. Strong student achievement is and indicator of principal leadership at this level.
4. Performance denotes outstanding leadership as described by the criteria for each domain and/or component. Principals at this level of performance operate at a qualitatively different level, both inside and outside their school. Their schools consist of a community of teachers who work collaboratively, are highly motivated and effectively engaged in the practice of teaching. Improving and/or high student achievement is one indicator of principal leadership at this level.

Evaluation Process

Forms:

The District/school has created rubrics and forms for use in the supervision and evaluation of principals. Evaluation forms and rubrics are found below. (Deleted as per Alison Henken

Growth Plan Development Meeting

The primary outcome of the growth plan meeting is for the evaluator, the Board President, and principal to work cooperatively to identify a specific goal or goals and the components to be evaluated. The emphasis during the growth plan development meeting is professional dialogue and trust development.

During the growth plan development meeting the evaluator and principal will work collegially to:

1. Develop professional growth goals – 50% of professional growth goals will be measurable.
2. Identify components – List the identified components to be evaluated. Identified components must support the goal(s).
3. Establish the activities, evidence and timelines for each component identified in the growth plan. Evidence may include but is not limited to:
 - ☐ Parent contact log
 - ☐ Teacher evaluation activities
 - ☐ Classroom visitation log
 - ☐ Classroom observation reflections
 - ☐ Faculty meeting agendas
 - ☐ Behavior management plan
 - ☐ Professional development log
 - ☐ Reflection and meeting logs
 - ☐ Student assessment information
 - ☐ Teacher, principal, student feedback via surveys, focus groups, etc

Implementation of Growth Plan

The Board President monitors the implementation of the growth plan goals and activities. Evaluation activities will be conducted openly and with the full knowledge of the principal. Evaluation activities should be conducted with sufficient time to make an adequate performance judgment. Evaluation activities will vary in frequency depending on the components that have been identified for feedback.

Parental Input:

Parental input shall be part of principal evaluations. Input received between March 1 and the last day of February of the following year will be included in written evaluations for that time frame. Only parental input received via the approved parental input form will be used in written evaluations. Parental input forms will be available in each school office and on the district web page.

Written evaluations will note the number of signed parental input forms received for each individual principal. Parental input forms received between March 1 and the last day of February of the following year will be included in written evaluations for that time frame.

Probation

A probationary period shall be provided by the Board to any employee whose performance is judged to be unsatisfactory.

1. The Board President will recommend to the Board in writing that the principal be placed on probation.
2. If the Board adopts the recommendation, the principal will be notified in writing by the Board.
3. The specific areas of unsatisfactory performance, along with provisions for adequate supervision and direction for probation will be defined in writing to the principal. A clearly articulated probationary plan will be developed. The plan will include identified concern(s), desired outcomes, and improvement targets. The plan will also include strategies for assistance and improvement. The plan of probation will include a mutually agreed upon timeline. The timeline shall not be less than eight full weeks or forty (40) school days.

Each step of the probation process including identification of concerns, observations/evidence collection and pre- and post-conference notes shall be documented and initialed by both the principal and the evaluator.

Stakeholder Feedback Form

Stakeholder Feedback Form for the Evaluation of the SMS Principal

The SMS Board of Directors is currently evaluating the SMS Principal. As part of this annual process, we are seeking input from parents, faculty, administrative staff and all Board members.

Please complete this form by rating the director in the areas indicated below by placing an X in the box corresponding to your choice. If you have no knowledge of a given area, please write n/a (not applicable).

You may submit comments if you wish. Please use the last page for additional comments if needed. *Board members are required to submit comments regarding the performance of the Principal.

Finally, please return the completed form to the individual indicated at the end of the form.

Thank you very much for your assistance with this important process.

Name: _____ Board of Directors: _____
Date of Observation: _____ Parent Council: _____
Date of Feedback Session: _____ Faculty Council: _____

Please return this completed form to: _____

The deadline is: _____

Definitions of Criteria

Exemplary: Of superior merit, remarkably good, highly professional
Competent: Adequate, properly qualified, capable, proficient
Needs Attention: Qualified, but capable of doing better in specific areas
Unsatisfactory: Not qualified, unacceptable or inadequate performance

Unable to Rate: Write n/a (not applicable)

CRITERIA	Exemplary	Competent	Needs Attention	Not Satisfactory
Governance Leadership Activities				
Communicates SMS vision and values				
Coordinates and facilitates communication between various school groups, governance groups; MSCS Board the district, parents and teachers				
Maintains high visibility and “open door” policy with parents				
Represents parent interests to faculty, staff and Board				
Interacts and provides appropriate leadership for parents, faculty and staff				
Demonstrates knowledge of Waldorf curriculum				
Demonstrates knowledge of Common Core State Standards, and Idaho State Standards				
Assists with the provision of resources				
Oversees curriculum and program development				
Participates in festivals and other school activities				
Is familiar and up to date with respect to Idaho charter-related knowledge and legislation				
Manages crisis as necessary				
Facilitates resolution of complaints and grievances				
Is competent in the oversight and proper organization of financial matters				
Comments:				
Students and Teachers				
With children, intervenes in school crisis situations				
With parents, advocate for the child and for the teaching staff.				
With teachers, represent the interests of the child and concerns of the parents				
Schedules and chairs IEP and SST meetings or appoints a qualified administrative designee				
Consults and debriefs weekly with Faculty Chair				
Attends weekly faculty meeting and disseminate school				

administrative information				
Oversees Specialty Teachers scheduling				
Establishes a presence with students and serves as a positive role model				
Coordinates disciplinary process when needed				
Establishes a safe school environment including respect for differences and diversity				
Oversees maintenance of student records				
Comments:				
Personnel				
Coordinates hiring process for certificated and classified personnel				
Assembles Hiring Committee when needed				
Assures timelines for selection meets the needs of the school				
Oversees evaluation of certificated and program-related staff				
Determines training needs, facilitates goal-setting and mentoring.				
Comments:				
Parent Council				
Attends Monthly Parent Council meeting				
With Board President, coordinates Parent Council Committees				
Presents "State of the School" talk and other Educational evenings as determined by the Parent Council outreach committee.				
Participates in decision-making regarding Aftercare Program				

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Comments:				
SMS Board				
Attends all SMS Board meetings				
Sets and post agenda in a timely manner				
Participates in fundraising processes as appropriate				
School Committees				
Attends meetings, co-facilitates as needed, responds to reports from committees				
Comments:				
District, State and Federal				
Represents SMS interests with the authorizer, in the district, state and on pertinent committees and organizations				
Ensures compliance with public school requirements				
Ensures compliance with district, state and federal regulations and policies				
As needed, represents SMS interests with state offices and in legal matters and matters pertaining to charter status				
Comments:				

AASA's Statement of Ethics for Educational Leaders

An educational leader's professional conduct must conform to an ethical code of behavior, and the code must set high standards for all educational leaders. The educational leader provides professional leadership across the district and also across the community. This responsibility requires the leader to maintain standards of exemplary professional conduct while recognizing that his or her actions will be viewed and appraised by the community, professional associates and students.

The educational leader acknowledges that he or she serves the schools and community by providing equal educational opportunities to each and every child. The work of the leader must emphasize accountability and results, increased student achievement, and high expectations for each and every student.

To these ends, the educational leader subscribes to the following statements of standards.

The educational leader:

1. Makes the education and well-being of students the fundamental value of all decision making.
2. Fulfills all professional duties with honesty and integrity and always acts in a trustworthy and responsible manner.
3. Supports the principle of due process and protects the civil and human rights of all individuals.
4. Implements local, state and national laws.
5. Advises the school board and implements the board's policies and administrative rules and regulations.
6. Pursues appropriate measures to correct those laws, policies, and regulations that are not consistent with sound educational goals or that are not in the best interest of children.
7. Avoids using his/her position for personal gain through political, social, religious, economic or other influences.
8. Accepts academic degrees or professional certification only from accredited institutions.
9. Maintains the standards and seeks to improve the effectiveness of the profession through research and continuing professional development.
10. Honors all contracts until fulfillment, release or dissolution mutually agreed upon by all parties.
11. Accepts responsibility and accountability for one's own actions and behaviors.
12. Commits to serving others above self.

-- Adopted by the AASA Governing Board, March 1, 2007

Teacher Evaluation Model, Growth Plan, Teacher Feedback Report, Rubric

Teacher Evaluation Model

Statement of Philosophy

The primary purpose of evaluation is to improve the quality of instruction. Supervision and evaluation of professional employees involve a cooperative process between staff member and administrator for the purposes of identifying and documenting the performance of individual staff members.

Statement of Purpose

The evaluation shall be conducted with each teacher to provide services as follows:

- ☐ So that each professional teacher knows how he or she is performing in his or her assignment.
- ☐ So that each teacher will be aware of both his/her strong points and weak points and areas where improvement, if any, is needed.
- ☐ To provide an opportunity for the supervisor and the teacher to discuss objectively the employee's job performance and mutually agree upon goals and objectives.
- ☐ To provide the following information to a teacher whose performance necessitates the imposition of probation or nonrenewal of contract:
 1. Written notice of the specific areas of unsatisfactory performance.
 2. A reasonable time period to make corrections.
 3. Adequate supervision, assistance, and evaluation during the

period of probation.

All monitoring or observation of the performance of a teacher shall be conducted openly and with full knowledge of the employee.

Statutory Requirements

There shall be a minimum of one (1) written evaluation in each annual contract year of employment, the first portion of which shall be completed before March 1 of each year and shall include input from parents and guardians of students as a factor. A second portion shall be included for all evaluations conducted after June 30, 2012. This second portion shall comprise at least fifty percent (50%) of the total written evaluation and shall be based on objective measure(s) of growth in student achievement. The requirement to provide at least one (1) written evaluation does not exclude additional evaluations that may be performed. No civil action for money damages shall arise for failure to comply with this subsection. (Idaho Code 33-513, 33-514 and 33-515)

Framework

The Teacher Evaluation Process is based upon the Danielson framework for teaching which centers on 4 domains of this practice.

DOMAIN 1: Planning and Preparation

Component 1a: Demonstrating Knowledge of Content and Pedagogy

Component 1b: Demonstrating Knowledge of Students

Component 1c: Selecting Instructional Outcomes

Component 1d: Demonstrating Knowledge of Resources

Component 1e: Designing Coherent Instruction Component 1f: Designing Student Assessments

DOMAIN 2: The Classroom Environment

Component 2a: Creating an Environment of Respect and Rapport

Component 2b: Establishing a Culture for

Learning Component 2c: Managing

Classroom Procedures Component 2d:

Managing Student Behavior Component

2e: Organizing Physical Space

DOMAIN 3: Instruction

Component 3a: Communicating with Students

Component 3b: Using Questioning and Discussion Techniques

Component 3c: Engaging Students in Learning

Component 3d: Using Assessment in Instruction

Component 3e: Demonstrating Flexibility and Responsiveness

DOMAIN 4: Professional

Responsibilities

Component 4a: Reflecting on

Teaching Component 4b: Maintaining

Accurate Records

Component 4c: Communicating with

Families

Component 4d: Participating in a Professional

Community

Component 4e: Growing and Developing

Professionally

Component 4f: Showing Professionalism

The domains and components for ancillary and extracurricular staff rely on domains and components appropriate to their framework for evaluation.

D. Performance Continuum

The continuum ranges from describing teachers who are striving to master the rudiments of teaching to highly accomplished professionals who are able to share their expertise.

- ☐ The teacher does not yet appear to understand the concepts underlying the component.

Working on the fundamental practices associated with the elements will enable the teacher to grow and develop in this area.

- ☐ The teacher appears to understand the concepts underlying the component and attempts to implement its elements. But implementation is sporadic, intermittent, or otherwise not entirely successful. Additional reading, discussion, visiting classrooms of other teachers, and experience (particularly

supported by a mentor) will enable the teacher to become proficient in this area

- ☐ The teacher clearly understands the concepts underlying the component and implements it well. Most experienced, capable teachers will regard themselves and be regarded by others as performing at this level.
- ☐ Teachers at this level are master teachers and make a contribution to the field, both in and outside their school. Their classrooms operate at a qualitatively different level, consisting of a community of learners, with students highly motivated and engaged and assuming considerable responsibility for their own learning.

Definitions

A. Renewable Contract Teachers: Continuing contract teachers will be evaluated at least once annually. (Idaho Code 33-515)

B. Annual Contract Teachers (Category Two and Three): Non-continuing contract teachers will be observed at least three (3) times during the year. One (1) observation must be made prior to January 1. (ID Code 33-514) All of the observations must be made before March 1.

C. Limited Contract Teachers (Category One): During the course of the year an individual is employed on a one (1) year limited contract, the school district will use the same evaluation process as is utilized for annual contract teachers. (ID Code 33-514)

Evaluation Process: Growth Plan Development Meeting

The primary outcome of the growth plan meeting is for the teacher and administrator to work cooperatively to identify a specific goal or goals and the components to be evaluated. The emphasis during the pre-conference is professional dialogue and trust development.

During the growth plan development meeting the teacher and administrator will work collegially to:

1. Develop professional growth goals – The professional growth goals are not necessarily measurable but identify an area of growth for the teacher. Sample goal: To improve instructional practice by implementing strategies that engage students in higher level thinking activities.
2. Identify Framework components – List the identified components to be evaluated.

Identified components must support the goal.

3. Establish the activities, evidence and timelines for each component identified in the growth plan. Evidence may include but is not limited to:

- Lesson plans
- Parent contact log and/or surveys
- Student work samples
- Classroom assessments
- Classroom observation
- Behavior management plan
- Professional development log
- Reflection log
- Student Growth measures

Implementation of Growth Plan

The administrator informally monitors the activities implementation of the growth plan. If a classroom observation is identified as evidence for an activity or activities within the growth plan, a formal observation will be scheduled. Observations will be conducted openly and with the full knowledge of the teacher. Each observation should be at least one (1) instructional period in length or for sufficient time to make an adequate performance judgment. Observations will vary in frequency depending on the components/elements that have been identified for feedback.

Pre-observation Conference

If an observation is identified as evidence within the growth plan, the administrator and teacher meet to discuss the observation. During this meeting the teacher and principal:

- Review the growth plan goal, components and activities associated with the classroom observation
- Schedule observation(s)
- Discuss the needs of students in the class to be observed
- Clarify evidence expectations

The pre-observation conference can be included in the growth plan development meeting if the classroom observation will be conducted within a reasonable time frame following the growth plan meeting.

Post-observation Conference

All formal observations should be followed by a post-conference between the teacher and the administrator. **The post-observation conference will provide the opportunity for the teacher and evaluator to review the growth plan goals, activities, evidence and timeline. It will also provide an opportunity for the teacher to reflect upon his or her professional growth in meeting his or her growth plan goals.** Either the teacher or the administrator may request a third party to observe the teacher. The teacher has the option to reply to the administrator's comments regarding the classroom observation.

Reflection Conference

The reflection conference will provide the teacher an opportunity to review the evidence for the activities identified in the growth plan. It also provides the teacher an opportunity to reflect upon a particular lesson to determine if the instructional goals were met and how he or she might teach the same topic or concept another time. The discussion should focus on, but is not limited to, the classroom environment and instruction. Formal or informal follow-up activity recommendations will be discussed during the reflection conference.

Feedback Report

Following the reflection conference, the teacher will be provided a written evaluation of the goal and components identified in the growth plan. The teacher has the option to respond in writing to the feedback form.

C. Informal Observations (walk-throughs):

Informal observations and walk throughs are a brief classroom visit (**3-5 minutes**) that enables the administration to observe implementation of the curriculum, **instructional teaching practices and decisions related to teaching practices**. Follow-up with the teacher is optional and will not be part of the teacher evaluation process. **Written notes related to walk-throughs may be placed in the teacher's file.**

Remediation Process

When an administrator feels that a teacher needs assistance to improve job performance, prior to the recommendation that the teacher be placed on probation, the administrator must work informally with the teacher and identify concerns about the teacher's performance using the following steps.

1. The administrator will schedule a meeting to inform the teacher verbally of performance concerns.
2. Should the concern continue, the administrator **will** document the continuing concern and the intent to place the teacher on a remediation plan.
3. If the concern is not resolved and continues to persist the administrator will inform the teacher in a written notice that he or she is being placed on remediation.
4. A remediation team is formed. The makeup of the team will be mutually agreed upon with input from the teacher and administrator(s). The purpose of the remediation team will be to review the identified concerns and develop a clearly articulated remediation plan. The plan will include the identified concern(s), desired outcomes, and improvement targets. The plan will also include strategies for assistance and improvement. The remediation plan will include classroom observations, including pre and post-observation conferences. The plan will include a mutually agreed upon timeline. The timeline shall not be less than eight full weeks or forty (40) teaching days. Teachers involved in the remediation process may request a Peer Assistance Team be formed to provide assistance in improving professional practice.

Each step of the remediation process, including observations, identification of concerns, and pre- post conference notes shall be documented and initialed by both the teacher and the administrator. If the identified concerns persist, a referral for probation may be made by the administrator.

A teacher may participate in the Peer Assistance Program during remediation or after being placed on probation.

Probation

A probationary period shall be provided by the Board to any employee whose performance is judged to be unsatisfactory and the remediation process has not successfully satisfied the terms of the remediation process.

1. The principal and/or supervisor will recommend to the Board in writing that the teacher be placed on probation.
2. If the Board adopts the recommendation, the employee will be notified in

writing by the Board.

3. The specific areas of unsatisfactory performance along with provisions for adequate supervision and direction for probation will be defined in writing to the teacher. A clearly articulated probationary plan will be developed. The plan will include identified concern(s), desired outcomes, and improvement targets. The plan will also include strategies for assistance and improvement. The probation plan will include classroom observations, including pre and post-observation conferences. The plan will include a mutually agreed upon timeline. The timeline shall not be less than eight full weeks or forty (40) teaching days.
4. Upon the employee's request, a support team may be formed. The make up of the team will be mutually agreed upon with input from the teacher and administrator(s).

Each step of the probation process, including observations, identification of concerns, and pre and post-conference notes shall be documented and initialed by both the teacher and the administrator.

Forms:

The District/school has created forms for use in the supervision and evaluation of staff.

Professional Development

Data collected by principals through growth plan and reflection conferences will be used to plan and design the staff professional development activities.

JOB DESCRIPTIONS

SAMPLE JOB DESCRIPTIONS

Administrator

Expectations of service from an administrator at SMS follow:

1. **OVERALL SCHOOL MANAGEMENT:** Create a team and work with the team of teachers and employees, lead in school activities to create the *school culture* necessary to make SMS be the school outlined in the charter, get the school accredited and maintain that accreditation, manage lunch program, busing, and other daily operational issues.
2. **FACILITY OVERSIGHT:** It is the job of the principal to track and suggest updates as appropriate to the SMS site. The principal also recommends purchases of equipment as well as getting equipment into workable order.
3. **SCHOOL FINANCE:** The principal creates and monitors the budget and overall monetary health of the school. In conjunction with the clerk, the principal reports spending history and plans to the Board of Directors.
4. **TEACHER AND EMPLOYEE MANAGEMENT:** The principal is in charge of advertising for individuals for positions, setting up interviews and participating in the interview process.
5. **PUBLIC RELATIONS.** All the following groups will be communicated with positively by the principal: suppliers, parents, students, competitors, stakeholders, employees, Board of Trustees.
6. **EVALUATION:** The principal conducts all evaluations on all employees and reports as necessary to the Board of Directors. (It is important for the principal to be aware about what can and what cannot be reported to the Board of Directors since they are the hiring and firing entity.)
7. **STUDENT DISCIPLINE AND MANAGEMENT:** If will be expected the principal will work with the students, teachers, and parents in discipline issues. Policies will be read, followed, and updated as required to enforce the Code of Conduct outlined in the Charter for SMS.

8. CURRICULUM: The principal will be sure the curriculum is used in the appropriate ways by the teachers. The principal will work with the teachers to make necessary alterations and changes to accomplish the goals outlined in the charter.

9. POLICIES: The principal will help create and then will follow all the policies of SMS.

10. PARENT ASSOCIATION: The Principal will work with the PA to assure both the school and PA are working side by side and not defeating each other's purposes.

Teachers Job Description

Syringa Mountain School provides a developmentally appropriate, arts-integrated [educational program](#) designed to promote the growth and development of the whole child. This school fosters the intellect, nurtures the imagination, and recognizes the emotional life of each child. We strive to create a community that cultivates respect for self and for the broader community. Our aim is to inspire children to live engaged and successful lives, prepared to meet the demands of their world.

Teacher Duties and Responsibilities:

- Responsible for ensuring that classroom and curriculum meet Waldorf pedagogy and Idaho State Standards.
- Adheres to the Ethical Educator & Professional Practices as set forth by the [Teacher Standards & Practices Commission](#).
- Evaluates and maintains [complete](#) and accurate files regarding the students' academic progress and physical, social and emotional growth, and communicates with parents or guardians on the individual student's progress.
- Plans and evaluates daily lessons that are developmentally appropriate.
- Identifies the needs of a group of students, as well as individual students, and provides for continuous assessment of their ability and differentiated instruction to meet individual needs.
- Provides instruction, organization and management in the classroom, which creates a respectful environment conducive to learning.
- Supervises students both in and out of the classroom in a respectful and positive manner.
- Responsible for appropriate use of space, equipment, and material storage.
- Responsible for creating and maintaining a healthy and safe environment within the classroom and the school.
- Adheres to all school systems, protocols and policies that are developed.

- Maintains professional competence through participation in school provided in-service activities and/or self-selected professional growth activities related to job responsibilities.
- Initiates, plans and participates in parent/guardian conferences and other contact, including a minimum of three class meetings per academic year, as well as sending written information home about class activities, in a timely manner.
- Fulfills other reasonable duties as prescribed by the Principal, including home visits with new students.
- For teachers with Idaho state certification: Maintains a valid Idaho teaching license registered in the manner provided by law during employment.

School Participation And Team Work:

- Arrives at work on time, punctually attends and actively participates in all required meetings and training.
- Required to be a respectful, cooperative, and reliable team member and participant in school activities.
- Consults with Principal and Building Screening Committee, in a timely fashion, to address the needs of students who are struggling.
- Responsible for communicating and coordinating with subject teachers regarding lessons, child behavior, parent communication, and reports through regular meetings.
- Attends at least one Board and all Parent Education meetings and school festivals per academic year.
- Participates on required committees as prescribed by the Principal.
- Participates in the assessment and planning of curriculum development and other programs to meet the needs of the school.
- Attends regular supervisory meetings with the Principal.

Direct Supervisor:

The Principal

Knowledge, Skills and Abilities Required:

- Ability to foster a nurturing classroom environment that respects all students and encourages them to do their best.
- Required to respect the confidentiality of information about enrolled children and families, personnel issues, contributors, and other school operations.
- Required to be a respectful, cooperative, and reliable team member and participant in school activities.
- Ability to multi-task and act independently; exercise sound judgment.
- Must be supportive of an environmentally friendly, commercial free atmosphere.
- Must be committed to building a diverse community.
- Confidentiality: Required to respect the confidentiality of information about enrolled children and families, personnel issues, contributors, and other school operations, as per FERPA regulations and policies.

Education and Experience Preferred:

- A minimum of three years of classroom teaching experience.
- Knowledge of Waldorf pedagogy.
- Idaho state teaching license.

Syringa Mountain School (SMS) recognizes the worth of all individuals and groups. It is the policy of SMS that there will be no discrimination or harassment of individuals or groups on the grounds of age, color, creed, disability, marital status, national origin, race, religion, sex or sexual orientation in any educational programs, activities or employment.

DRAFT ACCOUNTANT JOB DESCRIPTION

- 1) Prepare, examine, and analyze accounting records, financial statements, and other financial reports to assess accuracy, completeness, and conformance to reporting and procedural standards.
- 2) Compute taxes owed and prepare tax returns, ensuring compliance with payment, reporting and other tax requirements.
- 3) Analyze business operations, trends, costs, revenues, financial commitments, and obligations, to project future revenues and expenses or to provide advice.
- 4) Report to management regarding the finances of establishment.
- 5) Establish tables of accounts, and assign entries to proper accounts.
- 6) Develop, maintain, and analyze budgets, preparing periodic reports that compare budgeted costs to actual costs.
- 7) Develop, implement, modify, and document recordkeeping and accounting systems, making use of current computer technology.
- 8) Prepare forms and manuals for accounting and bookkeeping personnel, and direct their work activities.
- 9) [Survey](#) operations to ascertain accounting needs and to recommend, develop, and maintain solutions to business and [financial problems](#).
- 11) Advise management about issues such as resource utilization, tax strategies, and the assumptions underlying budget forecasts.
- 12) Provide internal and external auditing services for businesses and individuals.
- 13) Advise clients in areas such as compensation, employee health care benefits, the design of accounting and data processing systems, and long-range tax and estate plans.
- 16) Appraise, evaluate, and inventory real property and equipment, recording information such as the property's description, value, and location.
- 17) Maintain and examine the records of government agencies.

Business Manager- Job Description

Rolling Hills Public Charter School Business Manager will coordinate all records, payroll, and accounts payable. In the capacity as Business Manager, they will work under the administrator and assist in overseeing the school finances including timesheets, resource allocation, budget oversight, fiscal reporting, ISEE data, and financial strategic planning. Business manager will report directly to the Administrator but will be expected to interface and work closely with the Finance Committee. To ensure the successful operation of the school, it is assumed that the Business Manager is able to adequately complete his or her own job responsibilities and work closely with the Board, the Administrator and the Finance Committee to fulfill his or her duties.

Duties are as follows for the Rolling Hills Public Charter School Business Manager:

Business Manager-

- Track day to day finances ensuring adherence to the approved budget
- Work closely with the Administrator to monitor expenses of ongoing projects and grant expenditures
- Manage employee timesheets ensuring adherence to staffing projections/budget
- Assess staff resource allocation and assist Administrator in ensuring highest priority needs are met
- Continue to look for and/or recommend ways to become more efficient and save the school money
- Interface with Finance Committee: Keep committee apprised of unforeseen expenditures or budget overages. Work together to study feasibility of programs or requested resources, work together to evaluate school's service contracts

Payroll-

- Keep all employee payroll files accurate and up to date
- Responsible for getting pay checks to employees by the 25th of the month
- Responsible for all payroll reports (Quarterly, W-2, 1099, PERSI, Payroll taxes, etc.) and timely submission of payroll taxes.
- Annual update of employees on payroll system and record sick leave accrual.
- Complete W2 and W4 status change forms for all employees
- Maintain payroll reports for audit, prepare for audits

Accounts Payable-

- Responsible for deposits and keeping accurate monthly bank reconciliations.
- Make sure that all budget accounts are in line with State requirements, according to ISEE
- Segregation of duties procedures.
- Sales tax reporting. Coordinate with Parent/Faculty Association (PFA) for their portion of sales tax

Roles and responsibilities:

Board of Education – The board of education is ultimately responsible for most decision making in a school. They are responsible for hiring the principal. They also generally take into account the recommendations of the principal in the decision making process.

Principal – The [principal](#) oversees the daily operations of an individual school building. The principal is primarily in charge overseeing the [students](#) and faculty/staff in that building. They are also responsible for building community relationships within their area. The principal is often responsible for [interviewing](#) prospective candidates for [job openings](#) within their building as well as making recommendations to the board for hiring staff.

Teacher – [Teachers](#) are responsible for providing the students they serve with direct instruction in the area of content in which they specialize. The teacher is expected to use school approved curriculum to meet state objectives within that content area. The teacher is responsible for building relationships with parents of children which they serve.

Special Education – A special education teacher is responsible for providing the students they serve with direct instruction in the area of content with which the student has an identified learning disability. The special education teacher is responsible for writing, reviewing, and implementing all [Individual Education Plan's](#) (IEP) for students served. They also are responsible for scheduling meetings for IEP's.

Reading Specialist – A reading specialist works with students who have been identified as struggling readers in a one-on-one or small group setting. A reading specialist assists the teacher in identifying students who are struggling readers as well as finding the specific area within reading which they struggle. A reading specialist's goal is to get each student they work with on grade level for reading.

Intervention Specialist – An [intervention](#) specialist is much like a reading specialist. However, they are not just limited to reading and may assist students who struggle in many areas including reading, math, science, social studies, etc. They often fall under the direct supervision of the classroom teacher.

Administrative Assistant – An administrative assistant facilitates the day-to-day operations of a school as well as anyone. They are also the person who communicates most often with parents. Their job includes answering phones, mailing letters, organizing files, and a host of other duties.

Accountant – The accountant works under the oversight of a business manager on payroll, billing, expenditures and budget.

Teacher's Aide – A teacher's aide assist a classroom teacher in a variety of areas that can include making copies, grading papers, working with small groups of students, contacting parents, and a variety of other tasks. A paraprofessional may be assigned to one particular student or may help with a class as a whole. A paraprofessional works in support of the teacher and does not provide direct instruction themselves.

Custodian – A custodian is responsible for the day-to-day cleaning of the school building as a whole. Their duties include vacuuming, sweeping, mopping, cleaning bathrooms, emptying trash, etc. They may also assist in other areas such as mowing, moving heavy items, etc. They also have

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maintenance responsibilities for keeping all the physical operations of a school running. These may including repairs or contracting for services in electrical and lighting, air and heating, and mechanical areas.

APPENDIX N Outreach Activities

November 14th newspaper article May 10 newspaper article

May 28 newspaper article

May 30 public information meeting

August 15, 2013

Children Thrive When Education Meets Their Needs

If you care about children and how we prepare them for the future, please join us on May 30th and learn:

Why is a Waldorf methods charter school planned for our valley?

What it is? Who it will serve? How will it be funded?

Why is Waldorf Education the fastest growing independent educational movement in the world?

A group of parents, teachers, and community members is championing this endeavor to bring this truly unique educational choice to our public school offerings in the Wood River Valley. We are creating a K-8 public school that will...

- Nurture the intellect, imagination, and emotional life of each child.
- Offer a rigorous, relevant, balanced, and memorable liberal arts education.
- Incorporate sustainable living practices and experiential learning through daily animal husbandry and gardening skills.
- Infuse academics with singing, painting, drawing, flute, violin, storytelling, handwork, and drama.
- Touch children's hearts and kindle their imaginations.
- Inspire children to live engaged and successful lives, prepared to meet the demands of their world.

If you know a child who says the best part of their day is recess, come discover how they can be excited about their whole day!

Find out what you can do to make this education option available for all who choose it here in the Wood River Valley!

Thursday, May 30th, 6:00-7:30 PM

Wood River High School Distance Learning Room

Wednesday, November 14, 2012

News

Charter school proposed for Blaine County

Mountain School group looking at expanding and becoming public

By [TERRY SMITH](#)
Express Staff Writer

A group of parents and supporters of the private Mountain School near Bellevue, which minimizes technology in the classroom and focuses on academic rigor and sustainable living, is seeking to establish a public charter school in Blaine County.



If all goes according to plan, the private Mountain School would close in the spring of 2014 and a new charter school, emphasizing the same educational values, would be opened the following fall. The new school would tentatively be called the Wood River Waldorf Methods School.

Beekeeper Tom Harned, center, and Mountain School outdoor-skills teacher John DeLorenzo, right, teach children about honeybees at the Bellevue-area school last year. Express file photo

Currently there are four private schools in Blaine County, in addition to eight public schools, but there are no charter schools.

The Mountain School currently teaches by the Waldorf educational methodology, which views education as an art and presents subject

matter in a way intended to parallel a child's experiences. In addition to basic academics, the Mountain School and other Waldorf schools throughout the world emphasize "educating the heart, head and hand," sustainable living, gardening and farming, minimal use of technology and experiential learning.

Mountain School Director Mary Gervase said the Waldorf method is the "largest independent school movement in the world right now."

Currently, there are about 1,000 Waldorf schools in 91 different countries. In the United States there are 159 private Waldorf schools, such as Mountain School, and 44 public Waldorf schools.

Obtaining charter school status would allow the school to expand from a current K-3 enrollment of 34 to an initial K-5 enrollment of 140 students. Long-term plans are to expand the school to grades K-12.

Gervase, a longtime educator who also serves as an educational consultant to Idaho State University, Boise State University and the Idaho State Department of Education, said the idea of forming a Waldorf methods charter school was brought to her by parents and supporters of the Mountain School. Furthermore, she was asked to spearhead the effort.

While planning has been going on for several months, the idea is still at the starting gate when it comes to navigating the regulatory process.

Gervase said the group is awaiting nonprofit status before it can file a petition to become a charter school with the Idaho State Department of Education.

On Tuesday night, Gervase presented the initial plan to the Blaine County School District at the November regular school board meeting. She said earlier Tuesday that she wasn't sure how the district and the board would react to the plan but she was hopeful that they would be supportive.

Under Idaho law, a school district's approval is not necessary for establishment of a publicly funded charter school within the district's boundaries. If a school district won't authorize establishment of a charter school, then it can be done by the Idaho Public Charter School Commission.

There are currently 44 charter schools in Idaho. Only 14 of them were authorized by school districts, with the remainder authorized by the commission.

For the 2011-2012 school year, the state of Idaho provided \$77.6 million in funding for the 44 schools.

Charter schools in Idaho begin forming in 1998, the year that the state Legislature approved the Public Charter Schools Act, which authorized the funding of schools that were operated outside the mainstream school district institutions.

Michelle Clement Taylor, school choice coordinator for the Idaho State Department of Education, said the number of charter schools continues to grow as more parents want more say in how their children are educated.

Taylor noted that a few charter schools in Idaho have been formed and then had to close because of funding issues, since charter schools are not allowed to issue bonds for more money.

Taylor said the majority of the charter schools in Idaho were formed by the Idaho Public Charter School Commission because it's not uncommon for a school district to be "resistant."

The resistance comes from the fact that charter schools take students and state funding away from school districts.

"The money follows the child," Taylor said. "It's just the same as if a child moves to a new school district, the money follows the child."

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“In terms of academics, generally the charter school students perform better than the non-charter school students.”

Gervase estimates that the startup in 2014 of the Wood River Waldorf Methods School would require state funding of about \$616,000 for the initial 140 students envisioned. She said the school would continue fundraising efforts, such as now done at Mountain School, to fund things such as the operating farm at Mountain School.

“I think the time is right for this model of education to come here,” Gervase said. “While I think we have excellent schools in Blaine County now, I believe bringing this new education system to the valley adds value to the whole educational system.

“There’s just a lot of interest in an education that’s more holistic and has a more reasonable approach to technology,” she added. “I just feel it’s so important for us to have choice in the district.”

Terry Smith: tsmith@mtexpress.com

Friday, May 10, 2013

News

Charter school plan gains momentum

Board considering proposal from The Mountain School

By [TERRY SMITH](#)
Express Staff Writer

A petition to form a new state-funded charter school in Blaine County has passed a “sufficiency review” by the Idaho State Department of Education and has now been submitted to the Blaine County School District board of trustees for its consideration.

Supporters of forming the Syringa Mountain School near Bellevue would prefer that the district approves the petition, but school board approval is not mandatory. If the district declines, the decision can be appealed to the Idaho Public Charter School Commission for a final determination.

If ultimately approved, the Syringa Mountain School would replace the private Mountain School, most likely at the same location near Bellevue. One way or another, The Mountain School intends to close in the spring of 2014.

Syringa Mountain School supporters intend that the new charter



Mary Gervase

school would open in the fall of 2014.

The Syringa Mountain School would utilize the same Waldorf education teaching methodology now used at The Mountain School. The Waldorf methodology is best described as a “holistic” approach to education, viewing child studies as an art and presenting subject matter in a way intended to parallel a child’s experiences. In addition to basic academics, The Mountain School and other Waldorf schools throughout the world emphasize “educating the heart, head and hand,” sustainable living, gardening and farming, minimal use of technology and experiential learning.

In Idaho, state-funded charter schools began forming in 1998, the year the Idaho Legislature approved the Public Charter School Act, which authorized funding of schools that were operated outside of the mainstream school district institutions. There are presently 44 charter schools in Idaho, but none in Blaine County.

Leading the effort to establish Syringa Mountain School is longtime educator Mary Gervase, who is also director of The Mountain School.



The independent Mountain School near Bellevue will be closing in the spring of 2014. In its place, a state-funded charter school is being

proposed that would be known as Syringa Mountain School.
Express photo by Willy Cook

Gervase and other charter school proponents presented their plan to the district board of trustees at a special meeting on April 25. Gervase asked the board to consider two possibilities—one that the school district adopt the Syringa Mountain School as a magnet school for Waldorf teaching methods within the district, or another that the district authorize formation of the charter school.

At the meeting, Gervase praised the School District for being “innovative in education” and said establishment of a Waldorf-methods school would be an “existing fit within district core values.”

She said the Syringa Mountain School would offer “increased learning opportunities” and “expanded choices to parents and students.”

“It’s just really exciting that Waldorf education is the fastest growing independent educational movement in the world,” Gervase said. “They’re popping up everywhere.”

Currently there are about 1,000 Waldorf schools in 91 countries, including more than 200 in the United States. Some are private schools and some are publicly funded.

If established, the Syringa Mountain School intends to have an initial population of 165 students grades K-5. Later, the school would be expanded to include grades 6-8.

Michelle Clement Taylor, school choice coordinator for the Idaho State Department of Education, attended the April 25 meeting. She said school districts are often against forming charter schools because it takes funding away from the districts.

“What we’ve seen were the biggest challenges are when there’s not cooperation between the district and the charter school,” Taylor said, adding that charter schools tend to be more successful when authorized by a school district.

School Board Chairman Steve Guthrie, who visited The Mountain School earlier that day, said: “I saw wonderful things going on. We want you to be successful, but we do have to ask tough questions and sometimes it comes down to money.”

District Superintendent Lonnie Barber also expressed concerns about a funding loss for the district, speculating that the majority of the charter school students would be taken from the district.

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“That’s 120 kids that take \$5,000 each from the School District,” Barber said.

Consideration of authorizing formation of the charter school is listed as an action item on the agenda for the May 14 school board meeting.

Terry Smith: tsmith@mtexpress.com

Wednesday, May 29, 2013

News

Proposed charter school seeking state approval

School board votes to pass decision on to charter commission

By [TERRY SMITH](#)
Express Staff Writer

Syringa Mountain School, a charter school proposed for Blaine County, has now filed its petition for approval with the Idaho Public Charter School Commission.

"We're keeping our fingers crossed that we can convince them to authorize it," said Mary Gervase, who is leading the effort for establishment of the school.

If approved, the school would become state funded, as authorized under the Public Charter Schools Act that was passed by the state Legislature in 1998.

Gervase, who serves as director of the independent Mountain School near Bellevue, has said previously that The Mountain School will close in the spring of 2014. Her intent, and that of Mountain School parents and supporters, is that the new state-funded Syringa Mountain School would be operational by the fall of 2014.



Mary Gervase

Submission of the Syringa Mountain School petition to the state charter commission followed a Blaine County School District board of trustees' decision on May 11 to pass the petition on to the state.

The School District was earlier asked by Gervase to authorize formation of the charter school, but at the May 11 meeting she requested an early decision rather than waiting the 75 days the board of trustees legally had to make a decision.

Board Chairman Steve Guthrie noted that the board would need a significant amount of time to consider authorizing the charter school.

"What I'm hearing is, because of the time issue, that you'd prefer we pass you on to the charter commission," Guthrie said. "Our goal is not to slow your progress."

"I'm getting the feeling that you'd rather have us cut you free from our plodding methods," said Trustee Paul Bates.

The board vote to pass the decision on to the state was unanimous.

"The best of luck and you know we'll be partners," Guthrie said. "We want you to be successful, and we'll be here to work with you."

Gervase said Tuesday that she is pleased with the school board's decision.

"The school board made it clear," she said. "They graciously agreed to wish us well and pass us on with their support."

If the Syringa Mountain School is approved by the charter commission, it envisions an initial enrollment of 165 students, grades K-5. The school would later like to expand to grades K-8.

A major concern of school districts over charter schools is that they take students and thus state funding away from the districts. Those concerns were expressed by Blaine County School District officials at an earlier board meeting concerning the proposed charter school.

The Syringa Mountain School would utilize the same Waldorf Education teaching methodology now used at The Mountain School. The Waldorf methodology is often described as a "holistic" approach to education, considering child studies as an art and presenting subject matter in a way intended to parallel a child's experiences. Waldorf schools throughout the world emphasize "educating the heart, head and hand," sustainable living, experiential learning and minimal use of technology.

Terry Smith: tsmith@mtexpress.com

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Learn about Waldorf Education

Advocates of the proposed Syringa Mountain School charter school will explain Waldorf Education at a public meeting from 6-7:30 p.m. Thursday, May 30, in the Distance Learning Room at Wood River High School. "This will be the first of what will be a number of public events," said Mary Gervase, who is leading the effort to establish the school by the fall of 2014.

Do You Value Public School Choice?



Children Thrive When Education Meets Their Needs

If you are concerned about children and how we prepare them for the future, please join us on May 30th and learn:

Why is a Waldorf methods charter school planned for our valley?

What it is? Who it will serve? How will it be funded?

Why is Waldorf Education the fastest growing independent educational movement in the world?

A group of parents, teachers, and community members is championing this endeavor to bring this truly unique educational choice to our public school offerings in the Wood River Valley. We are creating a K-8 public school that will...

- ☞ Nurture the intellect, imagination, and emotional life of each child.
- ☞ Offer a rigorous, relevant, balanced, and memorable liberal arts education.
- ☞ Incorporate sustainable living practices and experiential learning through daily animal husbandry and gardening skills.
- ☞ Infuse academics with singing, painting, drawing, flute, violin, storytelling, handwork, and drama.
- ☞ Touch children's hearts and kindle their imaginations.
- ☞ Inspire children to live engaged and successful lives, prepared to meet the demands of their world.

If you know a child who says the best part of their day is recess, come discover how they can be excited about their whole day!

Find out what you can do to make this education option available for all who choose it here in the Wood River Valley!

☞ Thursday, May 30th, 6:00-7:30 PM ☞
Wood River High School Distance Learning Room

APPENDIX O Interested Family Lists

August 15, 2013

2013 Survey Monkey for prospective students and Constant Contact Survey 2012

Survey Monkey Results July 15, 2013

Total 140 responses

17 preschool

22 Kindergarten

22 1st grade

18 2nd grade

25 3rd grade

23 4th grade

13 5th grade

Total K-5=123 prospective students

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Parent email address or phone n	Child's Name:	Child 2	Child 3	Child 4	Grade each child will enter fall of 2014
Open-Ended Response	Child 1				Child 1 - Grade Entering fall of 2014
Amycliffordart@gmail.com	Manay whitcomb	Brendon Whitcomb			Child 2 - Grade Entering
Autumnskis@yahoo.com	lucas	ella			1st Grade
lorimburks@gmail.com	Elliott Burks	Isaac Burks			1st Grade
Kerryarenner@gmail.com	Levi	Josephine			1st Grade
Holinoli@hotmail.com	Edith Frates	Lucinda Frates			1st Grade
208-720-5757	Teagan Filoon	Rhys Filoon			1st Grade
Beckyolsenbraun@hotmail.com	Whit Braun				1st Grade
angie.ziebell@gmail.com	Sage Ziebell				1st Grade
tomharned@cox.net	Leigh Harned				1st Grade
tjtrtl7@hotmail.com	Finn Green				1st Grade
deannaimmel@gmail.com	Jack Margolin				1st Grade
Sirimuhkkhalsa6584@msn.com	Simran mcgrew	Leila mcgrew	Jaxon mcgrew		2nd Grade
shanonchristensen@yahoo.com	Louis Christensen	Louise Christensen			2nd Grade
amyschlatter@hotmail.com	Ellie Schlatter	Maggie Schlatter	Jake Schlatter		2nd Grade
brogers75@yahoo.com	Ellis Rogers	Mason Rogers			2nd Grade
Tom@chums.com 208-788-927	Spencer Ferries	Sully Ferries			2nd Grade
jconners@bcrd.org	Mazzy Conners				2nd Grade
soulgypsy@gmail.com	Layla Mehan				2nd Grade
nicole@qwestoffice.net 209-30	Conagher kane Detra				2nd Grade
tifsta@msn.com	Rylan Mann				2nd Grade
orcapup1@yahoo.com	nohea judd				2nd Grade
208-720-8784	Cora Scott				2nd Grade
hsinnamon@yahoo.com	Julia Sinnamon				2nd Grade
Erikanc@msn.com	Keane	Bryce			3rd Grade
jenpapejo@cox.net	savona johanningmeier	cree johanningmeier			3rd Grade
michellesandoz@cox.net	Ryan James Sandoz	Ellie Sandoz			3rd Grade
ktgedde@yahoo.com	Georgia	Harrison	Lila		3rd Grade
Kristaljohanna@gmail.com	Biop Sophia	Henry			3rd Grade
Halliekstar@gmail.com	Leo Star	Rowan Star			3rd Grade
abburrell@cox.net or 208-721-3	Avery D. Burrell	Shayne L. Burrell			3rd Grade
jeff@tseme.com	John Tumolo	Simone Tumolo			3rd Grade
gingerferries@cox.net 208.720	Spencer Ferries	Sully Ferries			3rd Grade
208 788 1407	Satya	Taj			3rd Grade
tmsmart@me.com	Gavin Smart	Taylor Smart			3rd Grade
annemariied@cox.net	Ruby Gardner	West Gardner			3rd Grade
travisjones001@gmail.com	Mats Radlova-Jones				3rd Grade
idahocarrie@gmail.com	Zander Douglas				3rd Grade
teresadonnelly@hotmail.com	Anika Peterson				3rd Grade

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nancy@thesageschool.org	Inez Kraynick				3rd Grade	
Angelahgrant@hotmail.com	20: Weylin kettleband				3rd Grade	
david_skinner@usa.net	Raven Skinner				3rd Grade	
Dannaca@cox.net	Madi Cox	Charlotte Cox			4th Grade	2nd Grade
juliehairston@hotmail.com	Tanner Hairston	Colton Hairston			4th Grade	2nd Grade
2083585446	LC Dahl	Lenox Dahl			4th Grade	Kindergarten
2bfitkbz@gmail.com	Jack	Liv			4th Grade	1st Grade
traviszerba@gmail.com	Ethan Zerba	Zach Zerba			4th Grade	1st Grade
DanCarr22@abl.com	Nevada Carr				4th Grade	
a.j.gray@cox.net	Julian Gray				4th Grade	
anniegetyourgun7@aol.com	Jake				4th Grade	
laurie@sunvalleymag.com	Kelby Whitehead				4th Grade	
birdsandberries@yahoo.com	Souther Ukiah Hood				4th Grade	
chrissiehuss@hotmail.com	Gretel Huss				4th Grade	
worthibloom@gmail.com	Gaby Bloomfield				4th Grade	
Jordanlbaker@mac.com	Rayne Baker				4th Grade	
sboettger@woodriverlandtrust.or	gunner boettger				4th Grade	
640 Kintail Drive, Hailey Idaho 8:	Thomas Wesley DeKlotz				4th Grade	
2087881100	Gabrielle				4th Grade	
Shanti@kielphoto.com	Jackson Ballard				4th Grade	
tawnibaker@gmail.com	Corey Trevino				4th Grade	
katie.corkery@cox.net	208.861. Madelaine Corkery	George Corkery			5th Grade	3rd Grade
erin_timbervalley@live.com	Hayden Mungall	Izzy Mungall			5th Grade	5th Grade
jamiegaber@yahoo.com	Imry	Josephine	Penelope	April	5th Grade	4th Grade
pipilaro@earthlink.net	208-309- Logan Pilaro	Zeppelin Pilaro			5th Grade	2nd Grade
croninm@cox.net	Jacqueline Cronin				5th Grade	
bcpaware@cox.net	Keyle N Potts				5th Grade	
peterboice@cox.net	Ella Rose Boice				5th Grade	
Bobbifilbert@gmail.com	208.77. Camas Filbert				5th Grade	
svearae@msn.com	Anja Grover				5th Grade	
208-720-6030	kristenalbright1@ Gracie Albright	Bella Albright	Fisher Albright		Kindergarten	2nd Grade
Arishailey@yahoo.com	Huxley flood	Corbin flood			Kindergarten	Pre-Kindergarten ages 3-
wrmaren@gmail.com	Cordell Hill	Noah Hill			Kindergarten	3rd Grade
matfilooninketchum@yahoo.com	Teagan Filoon	Rhys Filoon			Kindergarten	Kindergarten
kingram.funk@gmail.com	208-4 Varic Funk	Rutger Funk			Kindergarten	3rd Grade
erincpm@gmail.com	Wyatt	Saoirse			Kindergarten	Pre-Kindergarten ages 3-
Levilarkey@gmail.com	Ocean Larkey				Kindergarten	
Julie@adager.com	Corson				Kindergarten	
Kristaray@gmail.com	Aria Crofts				Kindergarten	
becquel.smith@gmail.com	Jack Smith				Kindergarten	

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Mtosullivan@hotmail.com	Duncan Fryberger				Kindergarten	
jlbanks234@yahoo.com	Edyn Teitge`				Kindergarten	
wrector@marketron.com	Tucker Rector				Kindergarten	
cecheath@yahoo.com	Cruz Torres				Kindergarten	
tanafrommontana@yahoo.com	Riggins Parke	Bella Parke	McCade Parke		Pre-Kindergarten ages 3-4	3rd Grade
brookepace@gmail.com	Samuel McKenna	Jack McKenna			Pre-Kindergarten ages 3-4	1st Grade
ajonas26@yahoo.com	Jude Benson	Jonas Benson			Pre-Kindergarten ages 3-4	1st Grade
dkhalsaphoto@yahoo.com	Kyra Singh				Pre-Kindergarten ages 3-4	
Jen_jaros@cox.net	Jake Jacoby				Pre-Kindergarten ages 3-4	
Bodaque@msn.com	Kensie Terra				Pre-Kindergarten ages 3-4	
bernadette.devito@gmail.com	Julien Tremblay				Pre-Kindergarten ages 3-4	
briankilb@aol.com	B Kilburn	Yael	Barbara	Asher	Pre-Kindergarten ages 3-4	4th Grade
	total all 142				92 total	41 total

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2012 Constant Contact Survey

76 Responses Constant Contact Survey 2012

Text Block:

The proposed school will provide a classical liberal arts education with an essential and abiding academic curriculum enhanced by integrated arts, movement, and project-based learning. The school will incorporate a working farm and garden, animal husbandry, and a wilderness skills program to provide a real-life basis for natural science, environmental studies, and the development of an actualized social community ethic.

This school would be funded by the State of Idaho and open to all, free of charge. ♦ Our mission is to provide an inspiring, enlivening and nurturing educational environment, combined with developmentally appropriate methods and materials, that will serve the deepest needs of our children and community.



1 Are you a resident of Blaine County?

Answer	0%	100%	Number of Responses	Response Ratio
Yes			75	98.6%
No			1	1.3%
Totals			76	100%

2 Would you support the creation of such a school in Blaine County?

Answer	0%	100%	Number of Responses	Response Ratio
Yes			74	98.6%
No			1	1.3%
Totals			75	100%

3 If you have children between the ages of 0-10 years, would you be interested in having them attend such a school?

Answer	0%	100%	Number of Responses	Response Ratio
Yes			60	78.9%
No			4	5.2%
Not applicable			9	11.8%
No Responses			3	3.9%
		Totals	76	100%

4 How many children do you have between the ages of 0-3?



Answer	0%	100%	Number of Responses	Response Ratio
0			46	60.5%
1			23	30.2%
2			3	3.9%
3			0	0.0%
No Responses			4	5.2%
		Totals	76	100%

5 How many children do you have between the ages of 4-6?



Answer	0%	100%	Number of Responses	Response Ratio
0			31	40.7%
1			33	43.4%
2			7	9.2%
3			0	0.0%
No Responses			5	6.5%
Totals			76	100%

6 How many children do you have between the ages of 6-10?



Answer	0%	100%	Number of Responses	Response Ratio
0			34	44.7%
1			26	34.2%
2			9	11.8%
3			2	2.6%
No Responses			5	6.5%

		Totals	76	100%
--	--	--------	----	------

7 Which of these children would you be interested in enrolling?

Answer	0%	100%	Number of Responses	Response Ratio
0-3 years			17	25.3%
4-6 years			31	46.2%
6-10 years			28	41.7%
		Totals	67	100%

[View comments \(16\)](#)

Text answer(s) for:

8 Do you have any additional comments or questions?

20 per page

Update

20 Responses

Answer	Respondent
Would like more info on the school.	Anonymous
I could not afford to send my child, once she is of age, to a private school. Though the Waldorf Method would be my ideal! I would absolutely send my child to the chartered school.	Anonymous

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This is exciting! We need more education options for our kids in this area!	roberson.brooke@gmail.com
One of my children went to TMS for a year and we loved it. If our second wasn't more ingrained in his current school and the economy better, we'd have considered TMS for him. Currently it's simply cost prohibitive for us to enroll him this year. Good luck!	kate@marketron.com
What concerns me about Waldorf education is the lack of 21st century learning - i.e. keeping up in the world of technology today	lorimburks@gmail.com
This type of school is greatly needed here in Blaine County. It would enrich the body, mind and soul of each child!!	jenpapejo@cox.net
Our Valley needs this school, as an alternative to the tradional public school education. Please, not all children learn in the same way. Our children need this school.	worthibloom@gmail.com
We are in full and complete support of The Mountain School pursuing a public charter. We value the unique opportunity the school provides for our children.	holinoli@hotmail.com
We have had such an amazing experience with The Mountain School for the past two years. We are so happy to think that this might allow all children in our Valley the opportunity to learn and thrive the way our daughter has. Best wishes!	sherrilditch@gmail.com
our family would strongly support establishing a Waldorff charter school. i think the more wonderful options we have in our community the better! thank you for pursuing this.	katie.corkery@cox.net
It would be an amazing gift to the children in our valley to have a Waldorf Charter School. Having choices for our children will grow them into better equipped adults. As it stands, children without monetary support Must enroll in Public School, and not all children thrive in that environment. Thank you for your efforts, lets make this dream alive	caradrougas@me.com
I love this idea! Thanks for your efforts to make it happen.	tawni@tanrg.com
I would like to see a greater range of educational opportunities here.	mattfilbert1@gmail.com
Strongly support BCSD creating a diversity of education al opportunities by creating a Waldorf style charter/magnet school in our community.	dale@livarch.com

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I believe it is important to have as many educational alternatives as possible. I believe in the Waldorf method and I like the Mountain School's environment. Event though my child was never the right age to attend the school, he has attended the Mountain School after school program as well as summer camps.	kolenick@cox.net
I would want to see Spanish as an integral aspect of the school. That's pretty much the only reason we're in public school--for the dual immersion benefit.	nlinscott@cox.net
My first preference is for TMS to stay an independent school. If it came down to a charter or a magnet, I would support a charter above a magnet.	halliekstar@gmail.com
What an incredible opportunity for the children in this valley and truly a deep need. Keep up your amazingly hard work to make this dream a reality and I pray that it will come to fruition!	paigeeredman@yahoo.com
Please pass this measure!	wawaji@mac.com
Yes, please! I would love to be a part of this. Would this school be connected to the Mountain School, or separate? Will it be in Hailey?	deannahull@gmail.com

August 15, 2013

APPENDIX P Student Handbook

August 15, 2013

SYRINGA MOUNTAIN SCHOOL



August 15, 2013

Draft Student Handbook

2014-15 School Year

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SYRINGA MOUNTAIN SCHOOL
Student (Parent) Handbook

Introduction

There are 45 charter schools in the state of Idaho. Although each one may be unique in its mission, program and in the challenges it faces they all have some crucial elements in common. Charter schools address the need for parents to have expanded choices in the kinds of educational experiences available to their children. Charters also address the need for parents to have expanded opportunities for involvement in the whole life of the school.

These elements, along with the expectation that the innovations provided by charter schools will translate into overall student achievement, represent the three-fold principles of the Charter Movement. Syringa Mountain School embraces these principles enthusiastically.

The Syringa Mountain School (SMS) is a community of teachers and families using teaching methods that nourish and educate children. We are committed to educating the whole child, head, heart and hands, while allowing each child's full potential to unfold. The education brings forth creative imagination, critical thinking, self-confidence and a sense of delight, wonder and reverence for nature and humanity while building a strong academic foundation. Children emerge with the capacity to impart direction and purpose to their lives and to contribute to their community.

This Handbook is one of the primary communication tools designed to help you better understand your school. Please read it thoroughly. If you have questions or comments, please share them with the Administration, the appropriate Class Teacher or Class Representative. Through clear communication and understanding we hope you will find the very best in education for your child.

Our Mission: Cultivating the Head, Heart and Hand

Syringa Mountain School offers Waldorf-inspired, arts-integrated education, incorporating sustainable living practices and experiential learning in a K-8 public school setting. Each child will impart meaning and direction to their lives, through cultivating their intellectual, physical, emotional, social and creative capacities in natural learning environments. Through a supportive community of peers, parents and teachers, each child will become a confident, self-directed and engaged learner, invested in his/her own education.

Our Vision

Syringa Mountain School will be a highly sought after public school providing a rigorous integrated educational program through a whole-child approach to learning. By integrating traditional Waldorf methods and curriculum with the Idaho Common Core State Standards and Idaho State Standards, children will emerge from Syringa Mountain School with a life-long passion for learning, well prepared for the transition into other academic programs, as creative thinkers, engaged citizens with a strong work ethic, and prepared to become stewards of the earth and its many diverse communities.

Syringa Mountain School will embrace the key aspects of the local sustainability movement, providing students and their families with an increased connection to their local environment. By utilizing the rich community resources of Blaine County, and through ongoing cultivation and development of the school's garden and farm, all children will be enabled to deepen their connection with the earth, self and community.

Our Educational Philosophy

Syringa Mountain School's curriculum places equal emphasis on a strong academic foundation, artistic expression, social development, and attention to the needs of each child. According to William Butler Yeats, "Education is not the filling of a pail, but the lighting of a fire." Waldorf education engages a child's intellect, imagination, will and sense of aesthetics. How a subject is taught is equally important as what is taught, hence the use of movement and arts in the curriculum. The research-based, time-tested pedagogical methods designed by Dr. Rudolf Steiner are at the heart of this mode of education. Waldorf methods inspire student volition, inquisition and creativity because classroom activities involve three key areas—the head (thinking), the heart (feeling) and the hands (willing).

A study conducted by Dr. Carrie Norlund found students who were educated with Waldorf-based arts integration reported numerous benefits, including divergent thinking, internalized knowledge through on-going visual stimuli, emotional intelligence, balance, self-perception, creativity and strength of will.

The Waldorf-inspired approach to education recognizes that certain capacities emerge in students at fairly predictable stages, while also allowing for individual rates of maturation and uniqueness. This recognition of child development underlies both the organization of the curriculum and the methods of teaching. Classrooms, materials used and curriculum cultivate a sense of beauty, wonder and deep respect for the natural world, affirming that the intelligence and imagination of the young child is best developed with a minimum use of technology; up to grade six computer technology is used only as a practical necessity for computer based testing, library and research purposes. Learning a second language begins in first grade. The joy of music enhances cognitive development throughout all of the grades including flute and violin. Cooperation and self-advancement is encouraged rather than outwardly directed competition.

SMS offers Kindergarten through Grade 8 as well as an on-site tuition based Pre-School and Home Study Program (see Home Study Program Guidelines). The curriculum and overall educational approach at SMS is primarily based on the developmental model of the unfolding child as presented by Dr. Rudolf Steiner, the founder of Waldorf Education. At the heart of that model is the conviction that education is an art. Whether the subject is arithmetic, history, or physics, the presentation must live--it must speak to the child's experience and observation of the world. First, in this method, comes the encounter, then encounter becomes experience and out of the experience the concept crystallizes. Encounter/experience, concept/perception, feeling/idea: these are the three steps in every genuine learning process. As such, the education at SMS stresses the natural

developmental rhythms of the child.

Teachers often lead the same group of children through the grades from 1-5, and 6-8 loops, fostering mutual respect and enhancing the teacher's ability to meet each child's needs as they unfold. The academic curriculum integrates the arts, drama, painting, and music, drawing and modeling. This model of education through the arts awakens imagination and creative powers, bringing vitality and wholeness to learning.

Each day begins with a two-hour main lesson. The main lesson is taught for a three or four- week block, and is often continued later in the term. Textbooks are not typically used in the elementary grades, but rather, the teacher creates a presentation and the children make their own books for each subject taught. These beautiful main lesson books are an important way in which art is integrated into everyday learning. Specialty subjects make up the remainder of the day. These subjects, often taught by specialty teachers, include foreign languages, music, eurhythmy, and artistic and practical activities. For a complete description of the curriculum, please refer to the "SMS Curriculum" available in the office.

Organization

The local school district or the State Charter School Commission will authorize Wood River Waldorf Charter School. The authorizer has provided the authority for the SMS to operate as a charter school within the district boundaries. The authorizer provides oversight ensuring the tenets of the charter are adhered to. The day to day operational oversight is provided by SMS Board of Directors who over see the budget, policies and evaluation of the school director.

A collaborative model governs SMS where the Board, Administration, Staff Council and Parent Council work together on policy and procedural issues. Within the charter school, the SMS Board of Directors is the final decision making body.

Board of Directors

The Board of Directors is responsible for ensuring that the school's practices are consistent with the vision and mission of the school. It approves all personnel, financial/budget, curriculum, instruction, calendar and policy and procedures for the school. They ratifies the annual budget. A copy of the Board of Directors Bylaws are posted on the school website or can be obtained at the school office.

The Staff Council

The Staff Council delivers the educational program. The Staff Council typically meets each week to discuss important instructional issues. The Staff Council also assumes a wide range of roles to support school and student success. Whether these roles are assigned formally or shared informally, they build the entire school's capacity to improve. The Staff Council work closely with all constituents to ensure the quality of educational programs and

maintain the highest possible standards for teaching and learning. They act as an influential advisory body on education, policy, and program matters and are facilitated by the School Administrator. Other instructional staff may also be asked to contribute to the support of the school through meetings, committees, etc.

Parent Involvement

Research conducted on the effects of parental involvement in the education of their children is clear--children and schools thrive when parents get involved. Positive outcomes of parental involvement include:

- ☐ Improved educational performance
- ☐ Better student behavior
- ☐ Greater feelings of ownership and commitment
- ☐ Increased parent support of the school
- ☐ Improved school attendance
- ☐ Better understanding of roles and relationships in the parent-student-school triad
- ☐ Improved student emotional well-being

One of the most unique features of Syringa Mountain School is the high level of parental involvement. Parents/guardians who choose Syringa Mountain School for their children agree to give an average of five hours per month or fifty hours over the course of the school year towards various volunteer opportunities that may include: playground supervision, assisting in the classroom, site maintenance, fundraising, hospitality, room parenting, serving on a Committee, attending parent education evenings, for example.

This high level of parental involvement enables parents/guardians to become integrally involved in shaping SMS and ensuring it fulfills its overall mission. In order to provide all parents/guardians with the opportunity to be informed about and participate in school level decision-making, information about the SMS Board meetings, agendas and activities is readily available to all families.

Parent Advisory

The Parent Advisory serves as an essential support group formed by parents. The Parent Advisory upholds the mission and vision of SMS, promotes the school's educational program, contributes to the physical maintenance of the school, conducts fundraising efforts, and coordinates volunteers for festivals and events, and generally provides appropriate support to parents. All parents are encouraged to attend and participate in Parent Advisory meetings.

Parent input and perspective is built into the Board membership, and is further channeled through the Parent Advisory-and its committees. The Parent Advisory is the organizational body for the parents. The parent community, through the classes, elects its members. The Parent Advisor serves as the ear and voice for the parent body and acts as a steering committee for their interests and concerns.

The Education Foundation

The SMS Education Foundation is the independent, non-profit fundraising arm of the school. Each year, the Board of Directors sets goals for fundraising based on program needs, and the Foundation works to help achieve them through programs such as the annual fund drive, capital campaign and auction fundraiser. 85% of funds raised go to program needs, 10% go to fundraising costs, and 5% is held in reserve.

Class Organization

Each class has at least one parent designated as the Class Parent. They provide the link between the class teacher and the families of the class. In general, Class Parents may be asked to plan field trips with the teacher, help organize parent evenings, organize fundraising opportunities, etc. Each class also has a Parent Advisory representative. That parent is responsible for attending meetings and reporting back to the class the activities of those meetings. The Parent Advisory Representative also functions as a committee liaison on the Advisory, voicing individual parent's concerns as well as the class' opinion as a whole on issues pertinent to the life of the school.

Daily Operations

The starting and ending times for the different grades are:

		<u>Starting time</u>	<u>Dismissal time</u>
Kindergarten	Grades	8:30	11:30
1-8		8:30	3:30

Absenteeism

When a child does not attend school on any school day he or she is considered absent. Parents must notify the attendance office within 24 hours of each day missed. The parent can come to the attendance office, send a note to school, leave a message or text at xxx-xxxx or email the office at attendance@woodriverwaldorf.org.

We strongly encourage families to arrange for vacations and trips during non-school periods. Please be aware that the continuity of your child's class study is interrupted when he/she is absent. It is imperative to be conscientious in this regard.

For additional information, refer to the policy for Absences and Tardiness in the Policies and Procedures section.

After-School Pickup

After school, students are to be picked up by their parent or other authorized person within posted pickup hours from designated student pickup areas. In order for a student to walk off campus after school hours or to be picked up in an area other than as designated, a *Permission for Student to Walk Off Campus* form must be on file in the school office.

After School Program- Kidspace

Kidspace is a self-funded after-school program designed to serve SMS families who need child care after normal school hours. For information regarding this program, call the Kidspace Coordinator at (xxx) xxx-xxxx or pick up a KIDSPACE Handbook at the school.

Animals on Campus

When visiting the school campus, please leave your animals at home. Dogs and other animals are not allowed on campus to ensure security for our farm animals and students. Exceptions must be approved by your child's teacher and the school director.

Arriving Late - Tardies

Because there is a rhythm to the day, with an opening and a closing activity, it is important that your child arrive at school on time to benefit from the entire class day. If a child is late, the child must first get a late pass from the school office before the child goes to class. It is imperative to knock and please wait for a teacher to respond. This may take a few minutes if the class is in the middle of an activity that would be diminished for everyone if it were interrupted. Parents must notify the attendance office within 24 hours the reason for the tardy. The parent may come to the attendance office,

send a note to school, leave a message or text at xxx-xxxx or email the office at attendance@woodriverwaldorf.org.

Early Pick Up of a Student

When a parent or guardian plans to pick a child up early, they need to send a notice at the beginning of the school day to the teacher. Students may go on walking field trips and the student may not be on campus unless the teacher is notified prior to leaving. Parents must go to the school office and sign out the student prior to going to the classroom to get the student.

Emergency School Closure and Snow Days

Announcements regarding school closure due to weather conditions, lack of electricity, etc., will be made on KNCO 830AM, KVMR 89.5 FM and KNCO 94.1 FM in the mornings as soon as conditions have been checked. SMS follows the same snow day protocol as the Blaine County School District. When the BCSD schools are closed, we are as well.

School Closures, once the children are at school, will be announced on the radio. Every family with a telephone number on file in the school office will receive a phone notice via our emergency phone system when there is a school closure.

Little Creek Nursery Program

Little Creek is a tuition-based on-site nursery program. The program does not receive state revenue (ADA). The nursery school teachers are trained early childhood educators familiar with Waldorf methods. For information regarding this program, call the Little Creek Director (xxx)xxx-xxxx.

Lunch and Snacks

Please make sure your child has an adequate breakfast at home. Students need to bring a mid-morning snack and lunch. These should be nutritious and well balanced. Gum, candy and sugary foods should be left at home.

Walking Field Trips

Class may go for a walking field trip as part of their daily activity at the school. Parents sign an acknowledgement when enrolling a student giving permission for students to go on walking trips without notifying the parents. If a parent knows they need to take a student out early on any day, they need to send a notice to the class teacher so arrangements can be made to pick up the child early.

Festivals & Ceremonies

The festivals serve as an opportunity for the entire school community to join together in seasonal celebrations. Planning and working together in anticipation of the festival and celebrating during the festival creates bonds among the entire community. The festivals serve as an important bridge between home life and school life.

The festivals to look forward to are listed below. Before each festival is celebrated, information about it will be in the newsletter. These festivals would not be possible without the participation of the children and their families.

Opening Ceremony

Traditionally, the opening ceremony is held on campus the morning of the first day of school. Grades One through Eight participate. Friends and family (including kindergarten families) are invited to attend. Typically the faculty and staff begin the morning with an artistic presentation. Amid speeches and stories, the community is welcomed back to school. The ceremony is highlighted by the traditional passing of a single rose from each Grade Eight student to each Grade One student to honor the young ones' entrance into the grades community. As the children file back to their classrooms to meet their first day's work, parents are invited to stay and visit, enjoying refreshments provided by the Parent Council. Grades One, Two, and Eight oversees this festival.

Harvest Festival

With gratitude for autumn's bounty and in preparation for the winter to come, the Harvest Festival is celebrated on campus on the last Friday in September. Family and friends are invited to attend.

Festivities begin mid-morning and continue throughout the day. Children have brought from home offerings of fall's bounty to place on the harvest table under a gaily-decorated awning. The food and flowers will be given to those in need within our school community and beyond. To begin the celebration, a parade to drumming and song invites each class to join in. As the parade passes the harvest table, the children's offerings are received and beautifully arranged by staff and students dressed in celebratory attire. The parade moves on and its members are seated for class presentations, the highlight of which is the courageous taming of a dragon, traditionally presented by Grade Two. The presentations over, the assembly is informed of activities to follow. In the past these have included a potluck lunch, the making of scarecrows, cornhusk dolls, Indian corn necklaces, juice pressing, games of skill, and races. Each class takes on a project that will benefit the school or community that may or may not also be completed on that day.

Halloween Festival

Traditionally celebrated on or around Halloween in the evening, this festival is the favorite of many. Because of time and space constraints, it is open only to families in our school community. Festivities begin at dusk. A path of luminaria has been laid inside and outside the school. The King and Queen meet groups of costumed journeyers (students and their families) who have purchased tickets to travel at a specified time. Led by a Star Guide

the group stops at many a doorway where a story or skit is presented. The travelers may meet Mother Earth, the Tooth Fairy, Jack and the Beanstalk, a fire dancer, an Indian maiden, a magician, friendly witches, or an African storyteller. The presenters are faculty, parents, children and friends of the community. At each stop a gift is offered each traveler. When the Star Guide bids his/or her group of traveler's farewell, each one carries away many happy memories as well as a sack full of treasures. Check your school calendar for November 1, as it is often a teacher in-service day.

Spiral Walk

The Winter Spiral Walk is held in December before the winter recess begins. Family and friends are invited to attend. The faculty presents an artistic offering and Grades Two through Eight participate in presentations. Although the kindergarten students do not perform, all kindergarten families are welcome.

Winter Fair

In some years, the Parent Council hosts a holiday gathering that is held before the Winter break. The scope of the fair varies depending on the interest of volunteers in preparing the event. Most recently, a series of activities for young children on campus has taken the place of a large-scale community event.

May Faire

On a Saturday in May, with spring in full bloom, we celebrate renewed warmth and fruitfulness. Traditionally the May Faire is held during the day when friends and family can enjoy music, May Pole dancing, class presentations, games, crafts, cakewalk, food, and frivolity. Everyone is invited to make a flower wreath for his or her hair. May Faire is sponsored by Grades Two, Three and Five.

Closing Ceremony

The school's closing ceremony is held mid morning on the last day of school. The children go home at the ceremony's end. Family and friends are invited to attend. The faculty and some classes, notably the graduating Grade Eight class, make artistic presentations. Each class teacher presents a gift that represents a notable part of the curriculum to the class teacher of that grade next year. The Grade One students present a rose to each Grade Eight graduating student just as they received their own welcoming rose in September. The ceremony ends with a song and a grand handshake, the faculty and staff bidding each student farewell for the summer. Grades One, Six and Eight hold this ceremony.

Graduation

Each year the school coordinates the graduation with the 8th grade teacher and the class parents. The venues often vary depending on the class size and

date of the ceremony. The entire community, relatives and friends are invited to attend. The graduates make speeches and artistic presentations and we learn of their service projects. Students are honored with ceremony, speeches, and music. Traditionally the ceremony ends with a social time and refreshments. Our 7th grade class is the official host and provides refreshments and decorations. The Director approves the final program for the event. As with all school events, the consumption of alcoholic beverages is not permitted.

Children with Special Needs

SMS will make significant effort to respond to the personal and academic needs of each child, and to identify and serve those who are academically low achieving. The school's small size, student-staff ratios, and looping model allow educators to develop special sensitivity towards individual student needs and backgrounds. This translates into a nurturing learning environment with low-stress levels and maximized success.

However, some students will invariably need additional academic or individual support. SMS has developed a plan for low academic achievers that is modeled after the *Response to Intervention (RTI)* framework. Our goal is to meet the needs of all our students through the use of a three-tiered system of support.

Tier I: Prevention

Tier I includes high quality classroom instruction delivered by qualified teachers and regular assessments of all students to monitor their progress toward reaching grade level benchmarks. Teachers are trained to address different learning styles of their students.

Tier II: Identification and Selected Interventions

Identification: In order to identify students who are not achieving at or above expected grade level, students falling below the class average on varied assessments are evaluated to determine if performance was at or below their potential, taking into account the timing of particular subject matter in the curriculum and the age of the child. Beyond academic performance, teachers look for other signals of need as we recognize that there are many factors that affect a student's performance .

Selected Interventions: Selected interventions are implemented by teachers for students identified as achieving below average grade level expectations. Interventions may include, but are not limited to, any of the following:

- ☐ Utilizing other teachers for collaborative, individual or small group instruction
- ☐ Utilizing parent volunteers for individual or small group instruction
- ☐ Peer support with older students, e.g. "reading buddies"
- ☐ Individualized or differentiated math, writing, reading, and spelling approaches
- ☐ Increased movement/sensory integration activities
- ☐ Modified class work, extra lessons, or extended learning opportunities

☐ Additional parent /teacher communication or partnerships

Child Study: If a student does not respond to initial teacher interventions, the student is referred to the *Child Study* process. Child Study occurs during the weekly Faculty Meeting. The class teacher initiates the process by giving colleagues a complete and holistic picture of the child. After the child is described physically, socially, and academically, the teachers have an opportunity to ask additional questions. Discussions of a particular child may take place during several meetings. Next, the teachers are asked to observe the child for one week. Then, the parents of the student are often invited to describe their child and to offer insight or suggestions. Teachers and parents brainstorm together in order to find solutions to help the student become more successful.

Care Team: To ensure that no student “falls through the cracks” a standing committee known as the *Care Team*—comprised of staff members with particular experience and passion for student support—meets regularly to monitor progress and to advocate for students. The Care Team uses a systematic problem-solving approach to assist students with any concerns that are interfering with success. Parent input may be solicited for the Care Team process.

The Care Team clarifies problems and concerns, develops strategies and organizes resources, provides a system for school accountability, and serves to assist and counsel the parent, teacher, and student. *The Care Team is a general education function.* All students can benefit from the Care Team, including but not limited to, those students achieving below grade level, those who are achieving above grade level and require greater challenge, and students who have experienced emotional trauma, behavioral issues, or language issues. Instructional staff that have concerns for a student can refer that student to the Care Team for consideration.

Tier III: SST Intensive Interventions

If there is little or no improvement during the first two tiers, the student will likely be referred to the Student Study Team (SST), for further assessment. The school will follow the ISDE SST processes with appropriate documentation and referral to special education assessment for services when indicated. Assistance will be requested/contracted from the Blaine County School District staff or another school district or contractor, when needed.

Communication

A bi-weekly electronic newsletter provides curriculum and school activity updates. Hard copies of the newsletter are available upon request from the office. Submissions for the newsletter may be given to the office and are due one week prior to publication. Any information originating from outside sources such as parents needs to be approved by the office in advance.

Donation of Property

When you make a donation of property to the school you need to see the Business Manager to receive a tax donation receipt. If you plan to lend an item to the school or classroom for temporary use you need to see the Business Manager for inventory purposes. Any property left at or donated to the

school will be considered school property unless it has been registered as a temporary/lent item. This process allows the school to keep an inventory and track school property, which insures that each classroom is properly equipped. Also, it allows the school to return lent items in a timely manner when the individual requests the return of or the school no longer has a need for the item. As a rule, the school does not lend out school property for private use.

Expectations of Parent Participation / School Compact

Parents are involved at all levels of the school to ensure their children's education is as rich as possible. Assisting their child's teacher both in the classroom and with class and home activities including home visits, working on various committees and tasks utilizing their expertise, parents are essential to student success.

Parents of SMS students are expected to be active participants in their student's education and the life of the school. It is essential that parents wanting to join the SMS community understand fully their responsibilities. To that end, the staff and faculty request that all our families and staff agree to:

Staff Pledge:

I agree to carry out the following responsibilities to the best of my ability:

Provide high-quality curriculum and instruction.

Endeavor to motivate my students to learn.

Have high expectations and help every child to develop a love of life and learning. Communicate regularly with families about student progress.

Participate in parent-teacher conferences

Hold parent (class) evening meetings

Provide a warm, safe, and caring learning environment.

Provide meaningful, daily homework assignments (grade appropriate) to reinforce and extend learning

Participate in professional development opportunities that improve teaching and learning and support the formation of partnerships with families and the community.

Actively participate in collaborative decision-making and consistently work with families and my school colleagues to make school accessible and welcoming places for families, which help each student achieve the school's high academic standards

Respect the school, students, staff and families.

Student Pledge:

I agree to carry out the following responsibilities to the best of my ability:

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Come to school ready to learn and work hard.
Bring necessary materials, completed assignments and homework.
Follow school and class rules.

Ask for help when I need it.
Communicate regularly with my parents and teachers about school experiences so that they can help me to be successful in school.
Limit my TV watching and contact with other electronic media and instead study or read every day after school.
Respect the school, classmates, staff and families.
Comply with the school policies such as dress code, attendance, discipline, media and etc.

Family/Parent Pledge:

I agree to carry out the following responsibilities to the best of my ability:

Read the Parent Handbook provided by the school to each family.
Read to my child or encourage my child to read every day in grades where directed by teacher.
Communicate with the teacher or the school when I have a concern.
Ensure that my child attends school every day, gets adequate sleep, regular medical attention and proper nutrition.
Regularly monitor my child's progress in school and provide quiet time and place for homework.
Attend orientations, parent-teacher conferences, parent (class) evening meetings and all-school community meetings.
Ensure timely arrival and pickup of your child.
Limit, or preferably eliminate, your child's contact with electronic media and limit use to weekends in middle school (i.e. television, video, video games, movies).
Volunteer at the school for minimum of five hours per month. This could involve joining a committee or providing support to a committee.
Support your child(s) teachers and respect the school, staff, students, and families.

Each year, the SMS Educational Foundation (the non-profit fundraising arm of the school), conducts a pledge drive whereby parents are asked to donate financially to the school. Please consider what this education means to your child and family and give what you can. This pledge drive ensures that our school continues to provide the children with the best education possible. Students will not be denied enrollment in the school if a family decides not to participate in the annual pledge drive.

Homework Policy

Homework is an integral part of our curriculum at SMS. It is framed by the philosophical ideal that we wish our children to be excited about learning

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and confident in their abilities as students. Our curriculum teaches to the head, heart, and hand of the child and homework should be balanced in the same way. Finally, rhythm between activity and quiet, in-breath and out-breath, is important in all that we do at school. It is our intent that homework will fit into a similar rhythm at home.

We value homework for it can also strengthen the bridge between school and home by providing parents with a glimpse of the work being done at school. However, homework should include only work that a student can do by himself or herself. Once students begin our strings and flute program, it is important that they practice their instrument at home regularly.

Media, Television, & Computers

Watching television and videos, regardless of content, can negatively affect a growing child's development. Like all electronic media, television lacks the human presence so vital to the nourishment of the child. Furthermore, children's need for creative play is inhibited and their ability to create images from within is suppressed by the electronically produced imagery. In place of television, computer or smart phone time, we encourage creative activities that engage the child's will such as drawing, puppetry, modeling, singing, dancing, music, stories and plenty of outdoor play. Storytelling and reading to and with your child are always suggested. Computers/technology is used in the upper elementary and middle grades where appropriate. We encourage you to seek these out and to speak to your child's teacher about this important issue.

Reports

Student reports are mailed home in the fall, winter, and spring for grades 1-8 and in spring for kindergarten students who meet the school's age cut-off for first grade in the fall. Student reports contain attendance records (grades 1-8) and a narrative evaluation.

Parent/Teacher Conferences

Conferences are scheduled twice a year to provide an opportunity for parents and teacher to share their impressions and concerns. Individual conferences can be arranged with teachers at any time when parents have a special concern. See your child's class teacher to schedule a meeting. Subject teachers are also available for conferences upon request. Teachers appreciate being informed of significant changes or circumstances in your child's life.

Parent Concerns

SMS staff want to know your concerns. Please contact your child's teacher or the school Director whenever questions arise. We all have an obligation not

to create an atmosphere of gossip and complaint at SMS. Parents are encouraged to speak directly to the person they might have a concern with as a matter of course. If the concern cannot be resolved, parents may address the director.

INSERT STAFF CONTACTS HERE

The Director holds weekly open tea meetings every Wednesday morning from 8:00 – 9:30 a.m. Everyone is invited and welcome to attend, even if you don't have something to discuss. The Director's email address is: director@woodriverwaldorf.org.

Redress Procedures

This procedure is designed to assist in the resolution of disagreements in those instances where the parties are unable to settle their differences. It covers grievances of an interpersonal nature that are not covered by established school policy.

Disagreement may arise in any community; such differences are a common consequence of human interaction. In a majority of these situations, the parties involved resolve the problems directly. At SMS, we strive to resolve all issues in a supportive environment, which honors all parties. It is important that all conflicts are resolved in a timely manner. SMS follows a four level model of resolution: direct, administrative, mediated and formal. Please note that our ultimate focus at SMS is educating our students. Parents need to work to resolve their differences with an open heart and a willingness to heal and move on.

Behavioral Expectations

Early Childhood Curriculum: Birth—Seven years old

At Syringa Mountain School young children are provided with a nurturing environment based on an understanding of the young child's specific developmental needs before the age of seven.

Young children naturally take in the world through their wide open senses and unite themselves with their surroundings primarily through imitation. The teachers strive through their example to be worthy of this imitation. During playtime teacher's work busily at household and farming tasks such as tending the garden, caring for the animals grinding grain, baking, sewing, carding and felting wool and making clothing, making toys, cleaning, and maintaining a warm, healthy, and secure environment. Some children join in happily with these tasks while others choose to carry the activity into their play. Verbal instruction is less emphasized as the teacher leads by example and song; letting the activity speak for itself.

Play is the work of the young child. In the preschool and kindergarten great care is taken to create an environment that is warm, orderly, beautiful, and carefully arranged to be an inviting stimulus for the children's play. Simple, unformed toys made from natural materials stimulate the child's imaginations to do the real work of transforming the toys to suit their play. As they transform these simple objects into boats, castles, farms and forests, they practice mastery of their own physical, social and problem solving skills. Imagination is further developed through a variety of artistic activities

such as water-color painting, crayoning, beeswax modeling, and seasonal crafts.

Storytelling, drama, puppetry, and singing provide rich language experiences. Circle games and finger-plays develop physical skills. Every day the children are served a wholesome snack and lunch which they help to prepare. Strong daily, weekly and seasonal rhythms bring all these activities into a form which children come to rely on and participate in with confidence and joy.

As the children progress through preschool and kindergarten, regular rhythms strengthen them inwardly and bring purpose to their outward tasks. With a healthy physical development, an active imagination, and a true reverence for the world, children are well prepared for the challenges of grade school.

Expectations in Early Childhood Classes

Discipline emphasizes a positive approach where the young child is gradually led toward an experience of self discipline. We expect children to behave in an age appropriate, respectful way towards adults, classmates, and school and personal property. Teachers use discretion in handling each circumstance using the following guidelines:

Respectful, Calm & Clear Communication: *We keep our language simple and try not to use too many words. We use simple, basic imaginations and metaphors to get our point across and avoid over-intellectualizing.*

Encouraging Messages: *We tell the children what they CAN do as an alternative to what they are not allowed to do. We also, take note when their behavior is exceptionally pleasing or helpful. We try to avoid empty praise but specific encouragement is excellent.*

Model Problem Solving Skills and Corrective Behavior: *Children in early childhood operate out of the mode of imitation. Modeling for them how to navigate through situations that they have not yet developed the “know how” for is far more effective than talking to them about what to do.*

MODEL – REMOVE – REDEEM – REINTRODUCE

Natural and Logical Consequences: *We avoid non-related consequences, i.e. taking away a toy for hitting. Instead we choose consequences that correlate to the child’s misdeed, i.e. for hitting the child may become ‘the doctor’ to heal the injured, to fix what has been broken or rest when the ears must be too tired to work right.*

Clear, Immediate, Calm Action

We believe that there is no “wrong” behavior... just behavior that is out of its right time, place, and intensity. *It is our goal to guide the children through direct modeling and engaging the imagination toward a better understanding of positive and harmonious behavior. For example, there is absolutely nothing wrong with wanting to speak with a friend; in fact, friendship is something to be cherished! However, speaking to a friend in the*

middle of a story or ring time may not be the best time or place to do so. Part of our task as educators is to help children appreciate when to engage and when to refrain and how to bring the correct level of intensity to each situation. All of the redirection, guidance and correction in the classroom are built around this idea.

- 1. When a situation occurs which requires disciplinary action, the first step is to right the wrong. If someone is hurt, the child responsible for the hurt is asked to give aid, such as bringing an ice pack or laying on a "healing hand". The teacher reminds the child that "hands are for good work and play," or "we use kind and gentle words." If the child easily forgets classroom rules, he or she will work in close contact with a teacher or assistant.*
- 2. If the incident is one to cause deeper concern, or if a student continues to be disruptive and/ or exhibits discourteous behavior, (taking age appropriate behavior into consideration) the teacher contacts the parents to discuss the situation. At this time the teacher may ask parents to be prepared to remove the child from school before dismissal time if the problem behavior occurs again. This action makes it clear to the child and all students in the class that such behavior is not tolerated.*
- 3. In certain cases as deemed necessary by the teacher, a meeting is arranged with parents, teacher and, if necessary, an additional member of the faculty or staff. Parents and teachers work together as a team to prepare a written course of action. This plan outlines steps to be taken at home and at school to address the child's behavior and to help him or her to move in a more positive direction.*
- 4. If the undesirable behavior persists parents may be asked to keep the child at home until a meeting with a Care Group, made up of several Faculty members, can be arranged. The Care Group may ask parents to seek professional help for their child such as counseling, medical help or assessment by an expert in child development. A written agreement outlining the required course of action will need to be signed by the parents before the child returns to the classroom.*
- 5. If the problem persists and professional help is not utilized or not utilized sufficiently enough to address the student's problems, the parents may be required to withdraw their child from the school.*

III. The Grades Curriculum

The class teacher provides continuity and security and cultivates trust by guiding the class over a period of years. The strength of the teacher-student bond enables the teacher to be compassionate, yet firm, in situations that require discipline. The secure learning environment encourages students to acquire self-discipline and develop pride in their work. This long term relationship also supports the formation of a strong partnership between parents and teacher.

The grades classes begin each day with a lively warm-up lesson that focuses on waking up the head, heart and limbs of the students with brain gym type activities, tongue-twisters, poems, songs, and games, often designed to reinforce the learning of the academic subjects being studied. Each day they also attend a one hour main lesson that focuses on one core academic subject for a period of three to four weeks. During this concentrated time of study students immerse themselves completely in the subject matter. It allows the class teacher the freedom to structure lessons artistically, incorporating a variety of activities, such as music, movement, and drama. For each subject block, students create an ongoing record of class work through composition, illustrations, and diagrams. This main lesson book is crafted with great care and becomes a treasured record of the student's learning and workmanship. The study of academic subjects taught by the class teacher is balanced and enriched with foreign languages, instrumental and choral music, drama, art, handwork, woodwork, and movement.

The Waldorf grade school curriculum, with its diverse assortment of meaningful activities, is designed to meet the changing needs of the child as he or she moves through various stages of maturation. Of equal significance is the manner in which the curriculum is presented; with each lesson the teacher speaks to the child's imagination, feelings, and experience. The organization, breadth and appropriateness of the curriculum allows for the development of a vital, happy, well-rounded child with an inquiring mind, an enthusiasm for learning, and a readiness to approach the demanding years of intellectual learning which are ahead in high school.

Expectations in Grades Classes

- 1. No Crosstalk Allowed! This means everyone is expected to pay reverent attention to whoever is speaking. No interruptions.*
- 2. No wandering around the classroom. Everyone stays seated unless they have communicated with the teacher first. We use sign language to communicate our needs.*
- 3. We raise our hand before speaking aloud.*
- 4. We use respectful and courteous speech. The children are welcome to have their own opinions, feelings, and express themselves freely. However, they must find a way to communicate that does not disrespect others. This includes a respectful tone of voice.*
- 5. We use our words first – always! The children are expected to problem solve issues on their own – or at least try to do so before grabbing a teacher.*
- 6. Absolutely no hitting, kicking, scratching or biting at any time! We have a zero tolerance policy regarding violence in the Grades Program. The students are old enough to regulate and redirect their behavior. The student will receive an immediate consequence and lose their recess privileges for the day. In extreme cases or repeated incidents, parents will be notified. In extreme circumstances (deliberate or repeated acts of aggression/anger) the student will be sent home immediately from school.*
- 7. Everyone helps at lunch time cleanup, chore time, and recess clean up! No one is exempt from their daily obligations. We maintain our classroom daily. Please see chore wheel for specific chores.*
- 8. The game or play stops when someone is hurt. All play stops until the injured party is safely away from the rest of the play.*
- 9. The children may have water bottles at their cubbies. .*

Our protocol for empowering children to problem solve on their own follows: Always ask the student bringing the concern “Did you talk to your friend first before coming to me?” If their answer is “no” send them back to speak directly with their peers. If the answer is “yes” – go check with the other party and ask if they were consulted.

If at this point, they are unable to resolve the issue, an adult will step in and assist.

The philosophy behind this method:

It teaches children to evaluate the seriousness of an incident: is it something that they can resolve with their friends or is it a big enough issue to bring in an adult? It teaches direct communication and begins to build strong inter-personal skills. It discourages gossip and mean spirited speech. It eliminates the endless tattling that often occurs around 7/8 year olds.

*If they play during work time, then they work during play time! Our classrooms operate under the **Fair Trade system**. The students understand that*

their behavior can either contribute to or detract from the learning environment. If they behave in such a way that they are detracting from the classroom experience, they will have to do something that contributes to SMS during their free time. (Chores, work, something helpful – there's always so much to do!)

Dress Code

Children are expected to dress neatly and cleanly and warmly. Clothing is to fit well: no sleeves dangling over the hands or pants that drag on the ground. Students work and play hard, and clothing may become soiled so keep this in mind when dressing your child for school. In order to keep maintenance chores to a minimum, students are asked to bring indoor shoes that stay at school.

Students change into their indoor shoes when they arrive at school and wear them while inside the school building. Both indoor shoes and outdoor footwear should support the foot and fit snugly so they do not fall off during active movement. Loose sandals, flip-flops and wearing hats and caps inside are not permitted. Students go outside every day so prepare your child for changing weather including rain and snow. Please dress children in layers as we can experience many different types of weather in one school day – for example, a good undershirt and long underwear (during cold months), a long sleeve, light sweatshirt or sweater and a coat. Please have your children wear socks every day.

SMS strives to be a model of quality and beauty in the educational process and to create an atmosphere of care and respect in all that fills the lives of students at our school. To that end we ask that all clothing, shoes, school bags and lunch containers be free of any logos, corporate advertising, and media images or characters. Furthermore, extreme faddish clothing, accessories such as jewelry, painted nails, and extreme hairstyles have a distracting effect on students and should be avoided. We wish to discourage focus on superficial, outward differences and protect students from influences that tend to prematurely push them into the world of adolescence before they are out of grade school.

Please Note: *Parents are asked to send and leave at school one long sleeve and one short sleeve shirt, a pair of undergarments, a pair of pants, and a sweat shirt. Please make sure all of these clothes are without any of the previously listened images. If a student is dressed inappropriately, or needs a change of clothes for any reason, he or she will be asked to change into one of these items. Questions about our dress policy can be directed to your child's teacher.*

Shared Discipline

When a parent is on site with their child, they are responsible for their child's safety. All animal pastures, corrals and coops are off limits after school dismissal each day, unless accompanied by a SMS staff member. After school hours, please admire and cajole our animals from outside their fences. Thank you!

Prohibited items/activities

The following are not permitted in school or on school grounds:

- *Pocketknives (unless approved by a teacher for a specific project) and other potentially dangerous items.*
- *Riding bikes or scooters during school hours unless sanctioned and supervised by a teacher.*

- *Chewing gum.*
- *Using music players, electronic games, etc.*
- *Playing ball, riding bikes and scooters, or roller-blades inside the school building.*
- *Excessive wrestling or roughhousing.*
- *Throwing rocks and other hard objects. Snowball throws are permitted with teacher permission and supervision.*
- *Using sticks for sword fights unless supervised by a teacher.*
- *Sleds with metals runners and sliding or sledding head first.*
- *Hard balls.*
- *Using swings, ropes and other playground equipment in a manner that puts anyone at risk.*

Medical Procedures

Support for Children with Medical Needs

Parents have the prime responsibility for their child's health and should provide school with information about their child's medical condition. Parents should obtain details from their child's General Practitioner (GP) or pediatrician, if needed. Parents should provide the teacher and administrator with full information about their child's medical needs. Any medicines needed by the child must be accompanied by written directions from the child's doctor.

Non-Prescription Medicines

Non-prescription medicines should not be brought to school. Parents are responsible for ensuring that their child does not abuse, pass on or otherwise misuse the medication.

Prescribed Medicines

Medicines should only be brought to school when essential; that is where it would be detrimental to a child's health if the medicine were not administered during the school 'day'. School can only accept medicines that have been prescribed by a doctor, dentist, nurse prescriber or pharmacist prescriber. Medicines must be supplied in their original container, with prescribers' dosage instructions and written consent from a parent or guardian as well as a note from the prescribing doctor. School cannot accept medicines that have been taken out of the container as originally dispensed nor make changes to dosages on parental instructions. It is helpful, where clinically appropriate, if medicines are prescribed in dose frequencies which enable it to be taken outside school hours. Parents are requested to ask the prescriber about this. It is to be noted that medicines that need to be taken three times a day could be taken in the morning, after school hours and at bedtime.

Long-Term Medical Needs

School needs to know about any particular needs before a child is admitted, or when a child first develops a medical need. For children who attend hospital appointments on a regular basis, special arrangements may also be necessary. It is often helpful to develop a written health care plan for such children, involving the parents and relevant health professionals.

This can include:

- *details of a child's condition*
- *special requirement e.g. dietary needs, pre-activity precautions*
- *and any side effects of the medicines*
- *what constitutes an emergency*
- *what action to take in an emergency*
- *what not to do in the event of an emergency*
- *who to contact in an emergency*
- *the role the staff can play*

Roles and Responsibilities

Parents and Caregivers should provide the school administration and teacher with sufficient information about their child's medical needs if treatment or special care is needed. They should, jointly with the school, reach agreement on the school's role in supporting their child's medical needs.

Parents should keep any child at home for 24 hours when they are acutely unwell in order to reduce the spread of infection. This is to protect other children with medical conditions such as asthma and diabetes, for whom illness can produce complications.

Teachers and Other Staff will have access to information on children's medical conditions and action to take in an emergency, provided the parents have given consent for this. Teachers will take all reasonable care to accommodate medical needs.

Storing Medicines

The School will only store, supervise and administer medicine that has been prescribed for an individual child. Medicines will be stored strictly in accordance with product instructions (paying particular note to temperature) and in the original container in which dispensed. Parents should ensure that the supplied container is clearly labeled with the name of the child, the name and dose of the medicine and the frequency of administration. Medicines must be in the original container as dispensed by a pharmacist in accordance with the prescriber's instructions.

Access to Medicines

Children need to have immediate access to their medicines when required. Therefore, wherever practical and appropriate children will be allowed to carry their own medication. However, it is important to make sure that medicines are only accessible to those for whom they are prescribed, therefore any child caught misusing or sharing medication would no longer be allowed to carry their medication.

Emergency Procedures

In the event of an emergency, procedures listed on your medical waiver will be consulted and every effort will be made to contact a parent so that they may accompany their child to hospital. If a parent is unable to get to school, a member of staff might accompany a child taken to hospital by

ambulance. Health professionals are responsible for any decisions on medical treatment when parents are not available.

Child Protection, Health, and Safety

The staff at SMS care deeply about the children within our community. We are committed to the physical, emotional, and mental well being of every student. We address minor illness and injury and will seek outside medical assistance if we feel it is needed. You will be informed of any illness or injury at school and of treatment given.

If a student appears emotionally or mentally upset, we will seek to better understand what underlies this distress and share with you any discoveries which shed light on this behavior. In accordance with state law, we will also contact the appropriate authorities whenever we believe that a child is in serious physical, emotional, or mental danger.

Immunization & Health Records

The State of Idaho requires an immunization record (or exemption letter) for each child. Your child must have a physical examination record on file. The physical examination must be updated every other year, and immunization records must be current. Children may not attend school without the proper medical information.

Mandated Reporting

Syringa Mountain School is mandated by Idaho Code to report any actual or suspected abuse or neglect to Department of Social Services within 48 hours.

Substance Use

Cigarettes and intoxicants of all kinds are strictly prohibited in the school building or on school grounds. Use of these substances is also prohibited during any off-campus school sponsored function involving children.

Toys

Students are asked to leave toys at home, as these frequently have a disruptive effect. Radios, tape or CD players, and electronic toys and games are not allowed at school.

Parent Lending Library

SMS has a small library of books for children, on parenting, child development, and Waldorf education. These books are available to all school

families and can be found in the office. All books must be checked out on the list posted on the cabinet and borrowed for no more than two weeks at a time.

Visitors

SMS staff welcome you to join us in our daily activities. All visits **must be approved in advance** by your child's teacher, as some days work better with our rhythms than others. Here are a few guidelines that will make your visit harmonious with our rhythms and enable you to observe our classroom in its natural state.

*Adult activity in the classroom – Your child's teacher will ask you to engage in our daily purposeful work, such as preparing snack, setting the table, helping with creative activity, knitting, etc... rather than playing or talking with the children. This will allow the children the freedom to play and explore. Please remember you are a **quiet** observer while you are working.*

Adult Conversation - When there is too much conversation among the adults two things become neglected that are immensely important for the young children and us. The first is our modeling of a focused "work" ethic. Our adult tasks are our "work"; the children's play or classroom tasks are their "work". The more we maintain a quiet, steady, reverent focus (singing while we work is always lovely), upon our tasks, the greater the harmony there is in the room. The second significant loss is observations. You are here to observe and learn more about Waldorf Education.

Questions: Your child's teacher will be happy to answer your questions at the end of your visit or through a phone call later in the day.

Notice of Concern

Teachers may notify parents in writing of behavioral or academic problems, chronic tardiness or absenteeism, and other concerns that may arise for a student. This **Notice of Concern** will be mailed or hand delivered to parents in order to inform them of a situation that requires their cooperation. Please speak directly with your child regarding this matter. Sign the form and return it to school the next day. This confirms that you are aware of the situation. If you need more information please contact the teacher by phone or schedule a meeting.

Suspension or Expulsion of a Student

Due to severe or persistent behavior problems, lack of progress, or extreme violations of conduct or safety a child may be asked to leave the school for one or more days. This action makes it clear to all students in the class and school that such behavior will not be tolerated. Suspension from school for a period of time or permanent expulsion may result from the following behaviors:

- Blatant defiance and disrespect.
- Consistent, repetitive inappropriate behavior.
- Use of swear words or inappropriate language.
- Any action that endangers the safety or life of another person or oneself.
- Physical acts that deliberately hurt another person or oneself or deliberately destroy property.
- Use or possession of illegal substances.

- *Bringing weapons to school.*
- *Theft or accessory to theft.*
- *Leaving school grounds during school hours without permission*
- *Sexual harassment. Defined by law as unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature*
- *An accumulated record of general misconduct.*

: The violence, consumerism and passive entertainment that are taken for granted in today's mass-media culture do not support the well being of children. The cumulative effect of repeated exposure to television, video games, movies, radio and computers can negatively impact a child's development. At Desert Marigold, we strongly encourage parents to take full responsibility for determining the type and extent of screen viewing (video games, game-boy, x-box, computers, etc.), and media exposure (television and DVD) their children receive. Your child's teachers will be providing information regarding media use and your child's education and engaging you in a dialogue that we hope will be stimulating and rewarding. Our goal in doing so is to do our utmost to create a learning environment that is conducive to active, imaginative learning.

Our recommended guidelines regarding media use are as follows:

1. For children in preschool and kindergarten: None, or as little as possible.

2. For children in grades 1 – 3: No television, video games, computers or movies during the school week; minimal parent-directed media use on weekends and during vacations.

3. For students in grades 4 – 8: No television or video games or computers in the morning before school; minimal parent-directed media use during the school week; parental involvement in determining appropriate media and computer-use choices at all other times.

Digital citizenship agreement

Technology may be used with upper elementary and middle SMS students as appropriate. This acceptable use agreement defines the responsibilities that each member of the SMS community must accept in order to use the School's technology resources. All members of the SMS community agree to follow school rules and commit to the School's values. Parent signatures are required prior to the start of the school year verifying they have read and comply with the student handbook requirements.

Acceptable Use Responsibilities for SMS Community

I understand the following:

- I continuously represent SMS whenever and wherever I use e-mail and Internet resources, even if I am using these resources away from or outside of the School's network.
- Any violation of the rules can result in loss of my privileges to use computers at SMS in addition to possible disciplinary action up to and including suspension and/or expulsion.
- If I knowingly enable others to violate these rules, I may be held accountable as if I broke the rule myself.

Use of School Virtual Resources

I will:

- Use SMS technology resources for academic and school-related purposes.

- Respect the work and privacy of others.
- Use my applications, email accounts, and SMS Network space appropriately, for school-related activities.
- Store my documents and files in places that are assigned to me.

I will not:

- Save or install files and/or software on equipment without the authorization of a teacher or the Network Administrators.
- Use SMS technology resources for commercial activity or to seek monetary gain.
- Intentionally introduce a virus or other harmful code anywhere on the SMS Network, and I will make an effort to keep my home computer free from viruses and other destructive materials. I will report any virus detections to a member of the technology staff.
- I will not use technology to bully another person.

Privacy

- I will not attempt to discover or use another user's login name or password, nor will I share my passwords. If I become aware of another individual's password, I will inform that person or a member of the technology staff.
- SMS respects the importance of online student-profile sites like MySpace, Facebook, Twitter, and others to students who use these sites as a means of communicating with friends. Students must understand the public nature of these sites and the risks, responsibility, and accountability that they, as site manager, must assume if they participate. They also must understand that their names and sites are linked with SMS, and as a result, the School may monitor the content of these sites because of the impact such sites can have on school accountability, public image, and student safety. Anything posted on a website by a student constitutes public speech and will be held to all the standards and expectations expressed in the Parent/Student Handbook.

Fair Use of Virtual Materials

- I will not copy or transfer any copyrighted software to or from computers on the SMS Network without the permission of the technology staff in my building.
- I will attempt to avoid the misuses of virtual materials at school and at home.
- I will properly cite all online, web, wiki, and similar materials that I transfer and use in my work.

Unacceptable Material and Activities

I will not use any of my e-mail or web page accounts to:

- Forward chain letters, joke collections, Internet urban legends, and other materials that clutter and slow down the SMS Network.
- Use SMS technology resources to store or to transfer software used primarily for hacking, eavesdropping, or network administration.
- Send personal political messages or represent SMS in any political arena.
- Annoy, hinder, or harass others with offensive, obscene, abusive, embarrassing, or threatening language or images, referred to as cyber bullying.
- Communicate with inappropriate or abusive language.
- Assume a fictitious identity.
- Access, download, store, or print obscene or pornographic material.

APPENDIX Q Suicide Prevention Plan

Suicide Prevention Plan: Ref. IDAPA 08.02.03.160 This Policy will be included in the policy manual and staff handbook and best practices in suicide prevention will be referenced in any publication updates.

IDAHO GUIDELINES FOR SUICIDE PREVENTION IN SCHOOLS

School personnel spend more time with our children than any other professionals and are thus in a valuable position, through appropriate knowledge and action, to prevent suicide among students.

IDAPA 08.02.03.160 states that “the State Board of Education rule requires that each school district adopt, and review annually, a comprehensive district-wide policy and procedure encompassing...7. Suicide Prevention...” among others. The following information is derived from best practices in school suicide prevention including, Madison Metropolitan School District guidelines; *Maine Youth Suicide Prevention: Youth Suicide Prevention, Intervention & Postvention Guidelines*, The Maine Youth Suicide Prevention Program, 2006; the California State Department of Education guidelines; the Florida Mental Health Institute guidelines; the Substance Abuse and Mental Health Services Administration; and the Idaho Schools and Suicide Work Group, a sub-committee of the Idaho Council on Suicide Prevention.

Suicide prevention in school settings may best be accomplished by a four-pronged approach:

1. **Student Well-Being:** There are, of course, many aspects related to the well-being of students. Two of these aspects are of particular importance in preventing suicide as documented by nationally known suicide expert Dr. Thomas Joiner in his book *Why People Die by Suicide*. Dr. Joiner points to failed belongingness and perceived burdensomeness as the two fundamental elements involved in desire for suicide. School personnel can play a key role in increasing student feelings of belongingness and capability/effectiveness (non-burdensomeness). See [School-Based Activities](#)

2. **Gatekeepers:** Gatekeeper trainings include all school personnel (including teachers, nurses, bus drivers, secretaries, volunteers, lunchroom personnel, parent representatives, and anyone who has regular contact with students) and must be completed before the student curriculum is in place. See [Guidelines for School Gatekeepers](#)

3. **Student Training:** Student prevention should be administered in a regular, relevant class setting, such as a health course or teen development class with a curriculum that focuses on warning signs, protective factors, available community mental health services, and a **strong message of hope**, with the purpose of helping students identify classmates or themselves to prevent suicide.

- **Do not** present students with curriculum until school personnel, parents, and community mental health providers are on board as gatekeepers and support is available for those presenting with suicide ideation.
- **Do not** present student suicide prevention training within six to twelve months of a completed suicide, depending the readiness of the school community. Continue postvention activities. See [School Response Guidelines for Suicide and Sudden Death](#).

4. **Screening:** It is critical to follow up with students who are identified by the training or coursework as at risk.

Student Well-Being

As noted above, student well-being is multi-faceted and, in its entirety, beyond the scope of these guidelines. However, in addition to the importance of students' feelings of belongingness and capability, school climate is another critical element. School climate characterizes the norms of interaction throughout the school building and in the classroom. It refers to the “feel” of a school and can vary from school to school within the same district. School climate is affected by the collective behavior and expectations, both formal and informal, of all staff, parents, stakeholders and students. A toxic school climate can have a profound impact on the emotional, physical and psychological health of students. Specific focus and effort on cultivating a supportive, respectful school climate through the implementation of a school-wide strategy, such as Positive Behavior Supports at www.pbis.org, is a key component to effective prevention measures.

Gatekeeper Training

Gatekeeper trainings are designed to raise awareness about suicide and suicide prevention. These prevention efforts target and benefit all citizens in a defined community, such as school, and provide basic information about suicide, the warning signs, and how to refer people to help. Gatekeeper trainings vary in length from very brief educational sessions to multiple day trainings. Programs may include classroom/lecture style information dissemination, small group discussion, use of videos with case studies, and/or participant scenario role plays. Many programs include combinations of these educational strategies. **Remember that it is better to train youth separately from adults.**

Gatekeeper training for identifying youth at risk for suicide should include:

- Data on suicide for the region and/or state
- How to talk to youth: Safe and appropriate language and messaging
- Stigma
- Risk and protective factors for youth
- Warning signs of suicide ideation in youth
- Protocols for seeking help for self and students
- Information about state statutes on responsibility, liability, and duty to warn
- Confidentiality issues
- Practice on responses to varying scenarios in the school building or on the grounds
- Protocol for dealing with suicidal students after school, on field trips or at school events

Gatekeeper training tools as well as a multitude of best practice prevention protocols are available on-line through www.sprc.org, www.afsp.org, or through your regional chapter of SPAN Idaho at www.spanidaho.org.

Student Training: Curriculum Concerns

- **Curriculum** for school-aged children **must be carefully chosen**; that is, it is based on best practices (fully researched) and age appropriate. See [Suggested Web Site Resources](#)
- Curriculum should **emphasize** the mental health model and iterate often that **help is available**, to the point of offering places and means to access that help.
- Curriculum needs to **address the code of silence** in peer groups and **emphasize that suicide is not common**.
- **Collaboration** between health education classes (or other appropriate classes) and student health services **is highly recommended** as the best way to implement curriculum into the classroom because of the sensitivity of the subject matter. The student support services personnel may serve mainly in the role of observer to notice the students' reactions to the lessons, and/or they may want to present a lesson or two while the teacher observes. Finally, share that the student services personnel are willing to help with any concerns students might have on suicide-related issues.
- **Suicidal behavior should not be normalized** by allowing students to think that death by suicide is common or a normal response to a stressful event. Instead, share the data about suicide while emphasizing that it is a permanent solution to a temporary problem, and that suicidal behavior usually occurs with a mental illness that is treatable (like depression). This is why we train kids to respond appropriately to their peer's expressions of suicidal intent through the curricula.
- If any type of **assessment/scale** to evaluate the mental health issues of students is implemented as part of a curriculum, it is **imperative** that the teacher/student service provider **review these immediately!** Students may be at risk and there may also be a liability issue. Also, **parents/guardians must be notified** both before presentation of such an assessment

and afterward be informed if their student(s) is at risk. See link to Guidelines for School-Based Suicide Intervention below.

- Because of the sensitivity and importance of this issue, the **curriculum** chosen might be **presented to school staff, to community agencies connected to youth and to parents/guardians or others who are in a position to follow up with students**. Again, parents/guardians should be alerted that the curriculum is being taught beforehand and invited to peruse it on-line or at this presentation. (Some ideas to accomplish this include back-to-school nights, through brochures sent home with students, or in the messages in the schools communication system.)

Important Issues in Curriculum Delivery

1. **Awareness of student issues:** Students who have experienced illnesses such as depression or have family members who have attempted or died by suicide may withdraw from the class discussion or make sarcastic comments about the topic. If the student seems upset or angry, please refer them immediately to appropriate student services personnel.
2. **Addressing cultural competence:** Suicide affects both genders and all races and ethnicities. Therefore, it is important to include the contributions, images, and experiences of diverse cultural groups in this unit of instruction. Also, be sure that the school has access to interpreters and community mental health services that have experience with cultures/ethnic groups represented in your school.
3. **Co-occurring suicide risk and substance abuse:** These issues are often interwoven with each other in youth. Alcohol and other drug abuse may add to the risk for suicide attempts. If you suspect this is an issue of concern, please consult with student services personnel in your school or a substance abuse counselor in your community before approaching this issue by yourself.
4. **Speakers and Assemblies:** Students who have attempted suicide should **not** be used as speakers as other students may identify with them or consider them as receiving extra attention. Because assemblies do not allow for easy identification of students who may be at risk, generally curriculum is best presented in small classroom settings.

For sample curricula, contact the State Department of Education student health personnel or visit www.afsp.org, www.sprc.org, or www.samsha.gov.

Screening

Although students may be identified with suicide ideation in schools which do not have crisis plans or suicide prevention protocols in place, counselors, social workers, school nurses, and other school team members generally have been trained to deal with such crises. That said, **before implementing a school curriculum for suicide prevention, gatekeepers should be trained to identify students at risk** as the curriculum may enable students to identify themselves or others in need of help.

It is **not advised to present screening to all students at one time** as research shows that a hysterical effect may occur. Legal issues may arise as well unless parents/guardians have consented to such screenings, and any identified students will have access to affordable, appropriate mental health care.

Be sure that parents/guardians are informed if students do present suicide ideation and take immediate steps to protect these students from self-harm. See [Guidelines for School-Based Suicide Intervention](#).

APPENDIX R Blaine County School District Statistics

3/13 Letter of Clarification to Superintendent and Board Chair BCSD Enrollment History and Projections

Article: Enrollment declines at county schools

3/26/13

1.

Dear Dr. Barber and Mr. Guthrie,

It has just come to my attention that I was in error on some of the answers I provided during our lunch meeting. In visiting further with Michelle Clement Taylor (State Department of Education) and Nick Hallett (State Charter School Commission), I wanted to update you on my latest understandings and recap some of the areas we covered over lunch.

If the school district authorizes a charter school, that school does indeed become a member of the school district. I thought that we would remain an autonomous entity but that is only if we are authorized by the State. If we are authorized by the district, the district has oversight of the charter school, just as it would other schools in the district. The charter school still has an independent school board, but it is encouraged to have a BCSD board member serve on the charter school board as a liaison. Apparently the Meridian Medical Arts Academy and the Technology Academy are good models of how this relationship can thrive.

Financially, all federal funds flow through the authorizing district and then are distributed to the charter school: special education, federal programs, ELL, Title.

Charter schools authorized by a school district do not have access to district bond or levy funds. Charter schools presently have to provide for their facility costs. The authorizer is not responsible for providing these. There is a bill in the legislature that if passed would provide \$115 per student for facility costs of charter schools.

If authorized locally, charter school student performance on state assessments is included in the district's accountability report card. If the charter school is a 4 or 5 star school, it benefits the district. A district authorized charter that is identified as "needing improvement," would work with the district on the school improvement plan and would also follow the district level improvement plan.

So why would a district authorize a charter school? Here are some thoughts from Michelle and Nick as well as my Board:

- To negotiate a win/win situation where a school of choice can be created and offered to the families in the district without having to create the accompanying infrastructure or assume additional expense.
- To support those parents in the district who want additional school choices among the district present offering.
- To facilitate adding innovative education approaches in the district by piloting them first, and then bringing them to other campuses once they have been proven effective.
- To provide a different educational placement for families who presently do not feel their children are being well serviced.

- To help to relieve some overcrowding at existing district schools.
- More of the levy and bond funds will be distributed to fewer students.
- Keep parents invested in the district. If authorized by the state, local voter decisions benefiting the district schools will not benefit the charter school and thus those families being served by the charter.
- Locally authorizing a charter school invests new parents in the district, those who are presently choosing private or home school education options-estimate 40 to 60 just from the present private school closing;
- Creates a win/win in that even though the charter may not directly benefit from local voter issues, anything that helps the district, helps the charter school even if indirectly.
- Possibly attract some new families that are living outside of the district boundaries or choosing to home school;
- Provide new opportunities for teachers and professional staff in the district.

What is the role of the authorizer?

According to the National Association of Charter school Authorizers, the following are the three core principles of charter school authorizing:

- Maintaining high standards for schools-maintain high standards for the schools it approves and oversees; close schools that fail to meet standards and targets set forth in the law and by the charter contract.
- Upholding school autonomy: preserves core autonomies such as governing board, personnel, school vision and culture, instructional programming and budgeting; holding schools accountable for their performance;
- Protecting student and public interests: make the well being and interests of students the fundamental value informing all the authorizer's actions and decisions, ensure students are admitted to the charter school through a random selection process, that special populations of students are appropriately served, etc.

It is important to recognize the *balancing act* of the authorizer in providing oversight to charter schools-honoring the autonomy of charter schools while holding them accountable for high achievement, effective management and serving all students well. -National Association of Charter School Authorizers:

Bottom line-chartering is a way to promote educational excellence.

Our interest and willingness in working with the Board and BCSD:

- Interest in adding value to the existing quality educational offerings;
- Finding ways to support and enhance each others' programs to benefit children;
- Opportunity to innovate on a smaller scale for possible future replication within BCSD

and statewide (the idea of charters as an incubator for change).

3

Examples:

- Person to serve as a liaison between the BCSD and Syringa Mountain Board of trustees;
- Collaborate with public schools on the farm, garden, wilderness curriculum through after school programs, summer school and even field trips;
- Professional development-invite teachers to our school to observe and our teachers attend pertinent BCSD PD;
- Economies of scale-contract with the district for services such as transportation, payroll, audits, special education oversight, ELL services

Review of the District Level Authorization Process:

- Purpose of public hearing is to request BCSD Board of Trustees to authorize us as a Charter School.
- Process: after the public hearing, the Board has 75 days to determine if they will authorize us.
- If the Board chooses to authorize us, we develop a contract that articulates the rights and responsibilities of each party regarding school autonomy, funding, administration and oversight, outcomes, measures for evaluating success or failure, required reports, annual reporting requirements and data collection, etc.
- The contract is an essential document, separate from the charter application, that establishes the legally binding agreement and terms under which the school will operate and be held accountable.
- It could include any fee-based services that the authorizer provides are set forth in a services agreement that and ensures that purchasing such services is explicitly not a condition of charter approval, continuation or renewal.

I hope you find this clarification of assistance as we move closer to the Board deciding on our fate! And of course, to reiterate, we are very much hoping the district will see us worthy of their authorization.

Lonnie, Michelle Clement Taylor will contact you to help clarify any of your questions. And Lonnie, Nick Hallett also offered to speak with you about the pros and cons of authorization. He and I work together as Capacity Builders in twin Falls so we have opportunities to visit frequently and he has been coaching me on the charter process. His contact is 312-4236 cell and 436-3794 home.

I look forward to our continued dialogue about the possibilities of a charter or magnet school as part of the Blaine County School District.

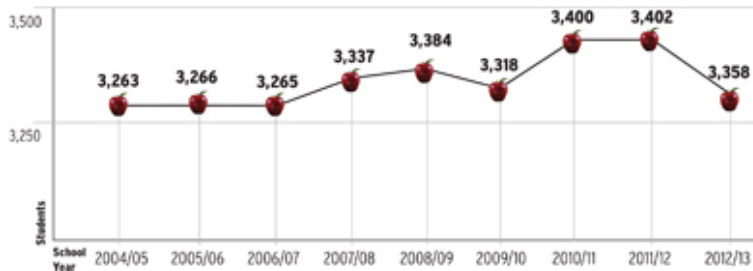
Warm regards, Dr. Mary Gervase

Wednesday, September 12, 2012 Mountain Express

News

**Enrollment declines at county schools
Plans for new elementary school remain on hold**

By TERRY SMITH
Express Staff Writer



Numbers provided by the Blaine

County School District show that student enrollment fluctuates but has remained basically steady over the past nine years. The numbers, however, are contrary to projections made in 2009 when funding was approved through a 10-year, \$59.8 million plant facilities levy to build a new elementary school. Since student numbers haven't increased as projected then, plans for a new school, estimated to cost about \$14 million, remain on hold.

Express graphic by Tony Barriatua

The Blaine County School District has 44 fewer students this year than it did last year. The decline represents only a 1.29 percent change in student population, but is contrary to projections made three years ago when the district was seeking voter approval to build a new elementary school.

That funding was approved by voters in 2009 as part of a 10-year, \$59.8 million plant facilities levy, which earmarked about \$14 million for construction of a new school. District officials have discussed off and on over the past few years the possibility of building a new school, but that plan now remains on hold with enrollment not increasing as earlier expected.

"Because enrollment in Blaine County has been relatively flat over the last few years, there are no plans currently to build an elementary school," district Communications Director Heather Crocker said Monday. "When and if the time comes that parents feel that class size warrants a new elementary school, I'm sure they will let the school board know."

"Enrollment, class size and programs are all factors when parents, teachers, the school board and the administration think about facilities," Crocker said. "Right now, almost every classroom throughout the district is being used."

The district released enrollment numbers for the 2012-2013 school year to the Idaho Mountain Express on Monday. The numbers show enrollment at the district's eight schools on Friday, which was the end of the first week of school and is the number used to establish official enrollment for the school year.

According to the district, as of Friday there were 3,358 students enrolled. That compares to 3,402 students enrolled at the end of the first week for the 2011-2012 school year. The district had an official enrollment of 3,400 students for the 2010-2011 school year.

“Because enrollment in Blaine County has been relatively flat over the last few years, there are no plans currently to build an elementary school.”

Heather Crocker

District communications director

Crocker noted that this year's official enrollment actually shows an increase of 52 students compared to the end of the 2011-2012 school year when enrollment was 3,306.

Official enrollment numbers have basically held steady over the past nine years, fluctuating only by 139 students between a low for the 2004-2005 school year of 3,263 and a high for the 2011-2012 school year of 3,402.

In earlier projections, the school district had expected enrollment to be more than 3,420 students for the 2012-2013 school year, and to reach 3,575 for the 2013-2014 school year. The district projected that enrollment would be more than 4,000 by the 2018-2019 school year.

Crocker did not offer an explanation as to why enrollment has held steady and not increased as projected, but did not disagree with an Express statement that the most likely cause is the sluggish economy here and elsewhere in the United States.

School by school

Enrollment, whether up or down or constant, varied at the district's eight schools.

Wood River High School showed a decline of 50 students, with 773 enrolled for the current school year compared to 823 last year.

Silver Creek High School, the district's alternative high school, showed an enrollment of 47 students this year compared to 48 last year.

Wood River Middle School showed a slight increase in students with enrollment of 685 for this year compared to 679 last year.

Enrollment at Bellevue Elementary School declined by 15 students, with 334 students enrolled this year compared to 349 last year.

Hemingway Elementary School in Ketchum also showed a slight decline, with 408 students enrolled this year compared to 414 last year.

Woodside Elementary School in south Hailey held steady with 348 students enrolled both this year and last year.

Hailey Elementary School was the only elementary school showing an increase in student population. Enrollment for this year was 507 compared to 481 last year.

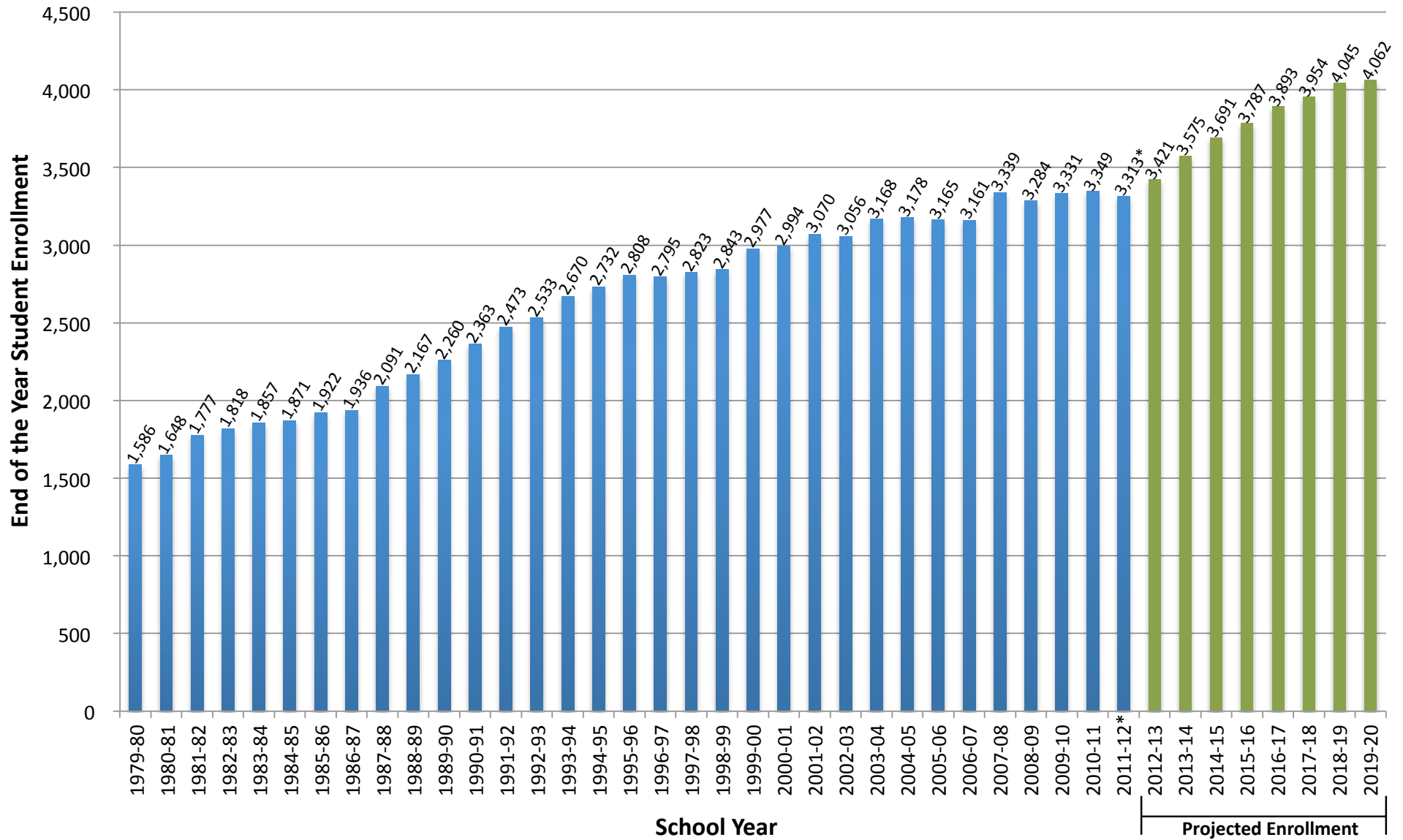
Carey School, which has grades K-12, showed a slight decrease with 134 students this year compared to 141 students last year.

Terry Smith: tsmith@mtexpress.com

August 15, 2013

Blaine County School District Enrollment History and Projections

Updated 4/11/2012



*Enrollment as of 4/11/2012

page 258

August 15, 2013

APPENDIX S **Dissolution (Taken from the Odyssey Charter School Petition)**

The dissolution process will follow four-step chronological process outlined below:

1. Pre-Decision Notification and Initial Steps
2. Decision to Close
 - a. Notification and Initial Steps (continued)
 - b. Development and Monitor Implementation of the Closure Plan
 - c. Finalize School Affairs: Governance and Operations
3. Closure Process
 - a. Finalize School Affairs: Governance and Operations (continued)
 - b. Finalize School Affairs: Finance
 - c. Finalize Schools Affairs: Reporting
4. Final Action Dissolution

The details of the above steps are outlined below.

Pre-Decision Notification and Initial Steps

Notify Parents / Guardians of Closure Decision

Within one day of the authorizer's decision to close the charter school, authorizer staff and charter staff/board collaborate to ensure that parents/guardians are notified regarding the closure decision. Such notification includes:

1. If applicable, an explanation of the process for an appeal to the Idaho State Board of Education and possible litigation including the implications for families.
2. Assurance that instruction will continue through the end of the school year or the date when instruction will cease.
3. Assurance that after a final decision is reached, parents/students will be assisted in the reassignment process.
4. FAQ about the charter closure process.
5. Contact information for parents/guardians with questions.

Notify School Districts Materially Impacted

Within two days of the authorizer's decision to close the charter school, notify districts materially impacted by the closure decision, including:

1. Possible appeals and timeline for final decision.
2. Copy of the letter sent to parents.
3. Closure FAQ.
4. Information about the plan being developed to ensure an orderly closure process.
5. Contact information for questions.

Review Budget

1. Review budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable.
2. Emphasize the legal requirement to limit expenditures to only those in the approved budget, while delaying approved expenditures that might no longer be necessary until a revised budget is approved.
3. Acknowledge that there are unique expenditures associated with closure for both the authorizer and school and that the parties will meet to identify these expenditures and funding sources.
4. Ensure that the school continues to collect revenues included in the school's budget, if applicable.

Meet with Charter School Faculty and Staff

Principal and charter board chair meet with the faculty and staff to:

1. Discuss reasons for closure, the status of appeals/legal action and likely timeline for a final decision.
2. Emphasize importance of maintaining continuity of instruction through the end of the school year.
3. Discuss plans for helping students find new schools.
4. Identify date when last salary check will be issued, when benefits terminate, and last day of work.
5. Describe assistance that might be provided to faculty and staff to find new positions.

Send Additional and Final Notifications

Notify parents and affected school districts in writing after key events (e.g., denial of an appeal) and when the closure decision is final. In the letter to parents after the closure decision is final, include:

1. The last day of instruction.
2. Any end-of-the-year activities that are planned to make the transition easier for parents and students.
3. Assistance that will be provided to families in identifying new schools. This may include a list of school options, choice fairs, individual meetings with families, and prospective school visitations.

Immediate Action

Notification and Initial Steps (continued)

The items of Notification and Initial Steps will continue during this step.

Develop/Monitor Implementation of the Closure Plan

Establish Transition Team, Develop Closure Plan, and Assign Roles

If possible, Transition team includes:

1. Lead person from authorizer staff.
2. Charter school board chair.
3. Lead administrator from the charter school.
4. Lead finance person from the charter school.

The team will develop plan, exchange contact information and assign roles.

Establish a Schedule for Meetings and Interim Status Reports

Agree on a meeting schedule to review progress and interim, written status reports to include:

1. Reassignment of students.
2. Return or distribution of assets.
3. Transfer of student records.
4. Notification to entities doing business with the school.
5. The status of the school's finances.
6. Submission of all required reports and data to the authorizer and/or state.

Submit Final Report

Submit a final report to the authorizer detailing completion of the closure plan.

Finalize School Affairs: Governance and Operations

Maintain Identifiable Location

Maintain the school's current location through the winding up of its affairs or relocate its business records and remaining assets to a location with operational telephone service that has voice message capability.

Notify Commercial Lenders / Bond Holders

Within 10 days after the final decision on the charter school closure and after all appeals have been exhausted, notify banks, bond holders, etc., of the school's closure and a likely date as to when an event of default will occur as well as the projected date of the last payment by the school toward its debt.

Protect School Assets

Protect the school's assets and any assets in the school that belong to others against theft, misappropriation and deterioration.

1. Maintain existing insurance coverage on assets, including facility and vehicles, until the disposal of such assets in accordance with the closure plan.
2. Negotiate school facility insurance with entities that may take possession of school facility – lenders, mortgagors, bond holders, etc.
3. Obtain or maintain appropriate security services. Action may include moving assets to secure storage after closure or loss of facility.

Maintain Corporate Records

Maintain all corporate records related to:

1. Loans, bonds, mortgages and other financing.
2. Contracts.
3. Leases.
4. Assets and asset distribution.
5. Grants.
6. Governance (minutes, bylaws, policies).
7. Employees (background checks, personnel files).
8. Accounting/audit, taxes and tax status, etc.
9. Personnel.
10. Employee benefit programs and benefits.
11. Any other items listed in the closure plan.
12. Determine where records will be stored after dissolution.

Notify Employees and Benefit Providers

Formally notify all employees of termination of employment at least 60 days before closure to include date of termination of all benefits in accordance with applicable law and regulations (i.e. COBRA) and eligibility for Idaho Unemployment Insurance pursuant to any regulations of the Idaho Department of Labor. Notify benefit providers of pending termination of all employees, to include:

1. Medical, dental, vision plans.
2. Life insurance.
3. Cafeteria plans.
4. 403(b), retirement plans.

5. PERSI.
6. Consult legal counsel as specific rules and regulations may apply to such programs.

Notify Contractors and Terminate Contracts

1. Notify all contractors of school closure.
2. Retain records of past contracts and payments.
3. Terminate contracts for goods and services as of the last date such goods or services will be needed.

Transfer Student Records and Testing Material

Send student records, including final grades and evaluations, to the authorizer, including:

1. Individual Education Programs (IEPs) and all records regarding special education and supplemental services.
2. Student health / immunization records.
3. Attendance record.
4. Any testing materials required to be maintained by the school.
5. Student transcripts and report cards.
6. All other student records.

Document the transfer of records to include:

1. The number of general and special education records transferred.
2. Date of transfer.
3. Signature and printed name of the charter school representative releasing the records.
4. Signature and printed name of the authorizer's representative who receives the records.

Inventory assets

Inventory school assets, and identify items:

1. Loaned from other entities.
2. Encumbered by the terms of a contingent gift, grant or donation, or a security interest.
3. Belonging to subcontractors.
4. Purchased with federal grants (dispose of such assets in accordance with federal regulations).
5. Belonging to SMS.
6. Return assets not belonging to school where appropriate documentation exists. Keep records of assets returned.

Notify Food and Transportation Services and Cancel Contracts

Cancel school district or private food and/or transportation services for summer school and the next school year.

Closure Process

Finalize School Affairs: Governance and Operations (continued)

The items of Finalize School Affairs: Governance and Operations will continue during this step.

Finalize School Affairs: Finance

Review and Revise School Budget

1. Review the school's budget and overall financial condition.
2. Make revisions that take into account closure and associated expenses while prioritizing continuity of instruction.
3. Identify acceptable use of reserve funds.

Maintain IR S 501(c)(3) Status

Maintain IRS 501(c)(3) status, including:

1. Notify IRS regarding any address change.
2. File required tax returns and reports.

Notify Funding Sources / Charitable Partners

Notify all funding sources, including charitable partners of school closure. Notify state and federal agencies overseeing the school's grants that the school will be closing.

List all Creditors and Debtors

Formulate a list of creditors and debtors and any amounts accrued and unpaid with respect to such creditor or debtor.

1. This list is not the same as the contractor list, above, but may include contractors.
2. Creditors include lenders, mortgage holders, bond holders, equipment suppliers, service providers and secured and unsecured creditors. A UCC search should be performed to identify secured creditors.
3. Debtors include persons who owe the school fees or credits, any lessees or sub-lessees of the school, and any person holding property of the school.

Notify Creditors

Notify all creditors of the school's closure and request a final bill.

Notify Debtors

Contact all debtors and request payment.

Determine PERSI Obligations

Contact PERSI to determine remaining liabilities for employee retirement program.

Itemize Financials

Review, prepare and make available the following:

1. Fiscal year-end financial statements.
2. Cash analysis.
3. Bank statements for the year, investments, payables, unused checks, petty cash, bank accounts, and payroll reports including taxes.
4. Collect and void all unused checks and destroy all credit and debit cards. Close accounts after transactions have cleared.

Close Out All State and Federal Grants

Close out state, federal, and other grants. This includes filing any required expenditure reports or receipts and any required program reports, including disposition of grant assets.

Finalize School Affairs: Reporting

Prepare Final Financial Statement

Retain an independent accountant to prepare a final statement of the status of all contracts and other obligations of the school, and all funds owed to the school, showing:

1. All assets and the value and location thereof.
2. Each remaining creditor and amounts owed.
3. Statement that all debts have been collected or that good faith efforts have been made to collect same.
4. Each remaining debtor and the amounts owed.

Complete Final Financial Audit

Complete a financial audit of the school in accordance with the Charter Schools Act by a date to be determined by the authorizer.

Reconcile with Authorizer

Reconcile authorizer billings and payments, including special education payments or other “lagged” payments. If the school owes the authorizer money, it should list the authorizer as a creditor and treat it accordingly.

Prepare End-of-Year Reports

Prepare and submit all required end-of-year reports to the authorizer.

Prepare Final Report Cards and Student Records Notice

Provide parents/guardians with copies of final report cards and notice of where student records will be sent along with contact information.

Final Action

Dissolution

Dissolve the Charter School

The charter school board adopts a resolution to dissolve that indicates to whom the assets of the non-profit corporation will be distributed after all creditors have been paid. Unless otherwise provided in the bylaws, the members (if any) or board votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution.

Notify the Secretary of State

After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth:

1. The name of the non-profit corporation.
2. The address of the non-profit corporation’s principal office.
3. The date dissolution was authorized.
4. If dissolution was authorized by the directors, a statement to that effect.
5. If dissolution was approved by the members, a statement of the number of votes cast for the proposal to dissolve.
6. Such additional information as the Secretary of State determines is necessary or appropriate.

Notify Known Claimants

Give written notice of the dissolution to known claimants within 90 days after the effective date of the dissolution.

End Corporate Existence

A dissolved non-profit corporation continues its corporate existence, but may not carry on any activities except as is appropriate to wind up and liquidate its affairs, including:

1. Collecting its assets.
2. Transferring, subject to any contractual or legal requirements, its assets as provided in or authorized by its articles of incorporation or bylaws.
3. Discharging or making provision for discharging its liabilities.
4. Doing every other act necessary to wind up and liquidate its assets and affairs.

Notify IRS

Notify the IRS of dissolution of the education corporation and its 501(c)(3) status and furnish a copy to the authorizer.

At this point, the school is closed.

APPENDIX T Calendars

Sample School Calendar Sample Marketing Calendar

Yuba River Charter School Calendar 2013-14

Approved by Board 3-6-13
Rev. 5-1-13

July 2013							August 2013							September 2013							October 2013										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
			1	2	3	4	5	6					1	2	3	1	H	3	4	5	6	7				1	2	3	4	5	
7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12				
14	15	16	17	18	19	20	11	12	T	T	T	T	17	15	16	17	18	19	20	21	13	B	B	B	B	B	19				
21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26				
28	29	30	31				25	26	27	28	29	30	31	29	30						27	28	29	30	31						
November 2013							December 2013							January 2014							February 2014										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
						T	1	2	1	2	3	4	5	6	7					B	B	B	4							1	
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8				
10	H	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	H	15				
17	C	C	C	C	C	23	22	B	B	H	B	B	28	19	H	21	22	23	24	25	16	H	18	19	20	21	22				
24	25	26	B	H	B	30	29	B	B					26	27	28	29	30	31		23	24	25	26	27	28					
March 2014							April 2014							May 2014							June 2014										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
						1					1	2	3	4	5					1	2	3	1	2	3	4	5	6	7		
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	T	T	T	T	T	13	14			
9	10	11	12	13	14	15	13	B	B	B	B	B	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21				
16	T	C	C	C	C	22	20	B	S	23	24	25	26	18	19	20	21	22	S	24	22	23	24	25	26	27	28				
23	24	25	26	27	28	29	27	28	29	30				25	H	27	28	29	30	31	29	30									
30	31																														

August 13-16
August 19
August 20
August 20-23
September 2
Sept. 10 & 11
September 27
October 8
October 11
October 14-18
October 31
November 1
November 11
November 18-22
November 27-29
December 20
December 23 - Jan. 3
January 20
February 14 & 17
February 22
March 17
March 18-21
April 1 - 10
April 5
April 11
April 14-18
April 21
April 22
April 26
May 2

Teacher Inservice
Registration Day **MANDATORY**
First Day of School & Opening Ceremony
All Minimum Days
Labor Day Holiday
Picture Day
Harvest Festival **Minimum Day**
Picture Make-Up Day
Minimum Day
October Break
Halloween Festival **Minimum Day**
Teacher Inservice Day - NO SCHOOL
Veteran's Day Holiday
Parent Conferences **Minimum Days**
Thanksgiving Break
Minimum Day
Winter Break
M.L.King Holiday
President's Holiday & Break Days
Moondance
Teacher Inservice Day - NO SCHOOL
(Optional) Parent Conferences **Minimum Days**
STAR Testing
Day in the Life of Kindergarten
Minimum Day
Spring Break
Break day - no school
SNOW DAY
Day in the Life of Kindergarten
Grandparent's Day - **Minimum Day**

May 3
May 9
May 16
May 23
May 26
June 2-6
June 6
June 9-12

May Fair
Medieval Games
Pentathlon
SNOW DAY
Memorial Day Holiday
All Minimum Days
Last Day of School
& Graduation
Teacher Inservice

First Trimester
Trimester Ends: Nov. 8
Report Cards: Nov. 22
Second Trimester
Trimester Ends: Feb. 13
Report Cards: Feb. 28
Third Trimester
Trimester Ends: May 30
Report Cards: June 20

Key to Symbols

T - Teacher Inservice
C - Conference Day/Minimum Day
H - Holiday
R - Registration Day MANDATORY
B - Break for Students and Staff
S - Snow Day

Minimum days are underlined **56**
175 days of student instruction
185 day teacher contract

August 15, 2013



Annual School Marketing Calendar
August - July

Focus: Increase Enrollment

Focus: Enrollment & Influencers

Focus: Engage Supporters

August	September	October	November	December	January	February	March	April	May	June	July
Create Your Annual Marketing Plan	Create Your Annual Marketing Plan	Distribute Postcard to Target List <i>Budget Option: Parent volunteers flyer grocery store parking lot</i>	Outreach to the Community with Flyers	Holiday Card	Letter with Response Card <i>Budget Option: Parent volunteers flyer target neighborhood</i>	Invitation to Attend Open House	Open House Event for Prospective Parents, Community Members and Supporters	Thank You to Open House Attendees	Press Clipping Package	Year-End Review	Back-to-School Drive
Press Idea: Launching a new, innovative program? Issue a press release on the program.		Press Idea: Announce your gains in API.		Press Idea: Students doing community service this time of year? Issue a media advisory for the service project or a press release after the event.			Press Idea: Issue a media advisory announcing your open house and personally invite local reporters to come.	Press Idea: Send a press release to announce parent informational sessions and deadlines for applications.	Press Idea: Plan an activity for National Charter Schools Week, issuing a media advisory and inviting reporters, parents and influencers.	Press Idea: Do you have high parent/teacher satisfaction? Issue a press release to highlight that.	

August 15, 2013

APPENDIX U Compassionate Communication, Teaching With Love and Logic

August 15, 2013



An Acknowledgment

I want to acknowledge Linda Wemhoff. She gave me support in 2002 when I first thought to do a booklet. She proofread, offered suggestions, simplified all of my heady stuff, and helped keep the layout open and light. Six years later, when I set about this revision, once again she generously gave support. I shower her with heartfelt thanks.

If you appreciate this booklet, kindly go express it by visiting her website: www.RecipeForPeace.com.

As always, I close with gratitude.



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email: john@empathy-conexus.com web: www.empathy-conexus.com

The Center for Nonviolent Communication

for further information on the work of Marshall Rosenberg,
visit the website at www.cnvc.org



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COMPASSIONATE COMMUNICATION



AND EMPATHY'S AWAKENING

By
John Cunningham

Revised in Spring 2008

FOR FURTHER REFLECTION



Dedicated to Marshall Rosenberg

...in the future no human being is to find peace in the enjoyment of happiness if others beside him are unhappy...Every human being shall see in each and all of his fellow-men a hidden divinity... that every human being is made in the likeness of the Godhead. When that time comes...every meeting between one man and another will of itself be in the nature of a religious rite, a sacrament...

Rudolf Steiner, The Work of the Angel in Man's Astral Body

There is more to seeing than meets the eye.

Norwood Russell Hanson, Patterns of Discovery



Through training we can become aware of the subtle clues which are hidden in the form of a sense object and which reveal the way in which it came into being. The form then begins to reveal its motion of becoming, its gesture. Our vision shifts out of space and into time, the stage of the ongoing work. With a time vision we can experience all sense objects as verbs instead of as nouns. Each object becomes itself in time.

Dennis Klocek, Seeking Spirit Vision

When the will becomes receptive, then consciousness becomes participative. It is when the will is assertive that the scientist is separated from the phenomenon, and consciousness 'becomes onlooker consciousness.' Participative consciousness means *conscious* participation in the phenomenon.

Henri Bortoft, The Wholeness of Nature

It is that man can in his soul dive down into sense-perceptible reality and experience thereby the spiritual aspect of sense-perceptible phenomena in such a way that he grows together with this spirit creatively living and weaving everywhere in nature. That is the greatness of Goethe's way of looking at the world—that it is directed towards this diving down into reality, and has the conviction that, insofar as one dives down into this reality, one arrives at its spiritual aspect and thus discovers the spirit inherent within it...

Rudolf Steiner (lecture on 11.10.1919)

Now the time has come to enliven and spiritualize the intellect which is already hardening again. The time has come to transform the formal power of thought through love into its intuitive form and to intensify the power of will, active in thinking, into clairvoyant thinking (Imagination). 'Upon this fact, that the ideas of the human being do not remain only thoughts but become a seeing within thinking, immeasurably depends.'

Sigismund von Gleich, The Sources of Inspiration of Anthroposophy

He rose to his feet again and asked, "Uncle, what is it that ails thee?"

Wolfram von Eschenbach, Parzival

ANTHROPOSOPHICAL RESOURCES

Dieter Brüll, The Mysteries of Social Encounters

Henri Bortoft, The Wholeness of Nature

Baruch Urieli & Hans Müller-Wiedemann, Learning to Experience the Etheric World

Nigel Hoffman, Goethe's Science of Living Form

Harry Salmon, The Social World as Mystery Center

Henning Köhler, Difficult Children: There is No Such Thing

Baruch Urieli, Male and Female: Developing Human Empathy

Margreet Van Den Brink, More Precious Than Light

Michael Luxford, Loving the Stranger

Georg Kühlewind, Star Children

THE ARCHETYPAL SOCIAL PHENOMENON

The archetypal social phenomenon is our social organ of cognition.

Dieter Brüll, *The Mysteries of Social Encounters*



The social aspect of the spiritual life demands that I open myself to the other person, invite him to express himself in me. In this way I am able to experience his questions of inner development as my own.

Dieter Brüll, *The Mysteries of Social Encounters*

When man faces man the one attempts to put the other to sleep and the other continuously wants to maintain his uprightness. But this is, to speak in the Goethean sense, the archetypal phenomenon of social science... [This sleeping-into] we may call the social principle, the social impulse of the new era: we have to live over into the other; we have to dissolve with our soul into the other.

Rudolf Steiner (lecture on 11.10.1919)

Now it is a question of whether I can carry over into waking up what the other entrusted to me. To the degree to which I can hold this in my consciousness, I come to insights that I can bring into conversation by taking the word and putting the other to sleep. It involves practicing two skills: freeing a space for the other so that he or she can speak undisturbed, and the ability to hold in awakening what the other said... The archetypal phenomenon of social life only leads to this meeting when we learn to manage it in consciousness, that is, when we can consciously follow the movement of the pendulum between falling asleep and awakening and find the way to the heart of the other. We must develop abilities of soul like having a strong interest, listening, presence of mind, objectivity, and the skill to understand the other from the inside.

Harry Salman, *The Social World as Mystery Center*

In the act of accepting that the other person puts us to sleep, freedom and love are both involved. Surrendering our consciousness is a sacrificial deed of love: it can only be offered up in freedom... "Compassion and love enable us to come free of ourselves and to live within the other being."

Dieter Brüll, *ibid.*

In our time the asocial drive presents itself automatically. In contrast, the social drive—to provide the opportunity for the other person to be resurrected in our soul—is something that 'needs to be consciously nurtured.'

Dieter Brüll, *ibid.*

A socially sensitive person will not leave to his own judgment the permission to put another to sleep with his thoughts, feelings and impulses. Such a person will wait to be invited in by the other... And when the invitation is offered, he will make modest use of it. He will not strive to extend the 'sleep' of the other, but rather allow him to return to the unsocial, the 'wakeful state' in a timely manner... He accepts a great responsibility, namely to answer not based on his own opinion but on his fellow human's situation... His own view ('myself in your place') is appropriate only when his fellow human asks him to share the problem from his point of view, in other words, when he invites him to put him, in turn, to sleep.

Dieter Brüll, *ibid.*

The ego-sense is the Archetypal Social Phenomenon in us.

Karl König, *Man as a Social Being and the Mission of Conscience*

INTRODUCING COMPASSIONATE COMMUNICATION

This quality of inner interest, which demands a kind of 'turning' toward another, is to be found in its most archetypal form in Parzival's words, 'Uncle, what is it that ails thee?' Whenever one human being is willing to take an active interest in the existence and destiny of another, to turn toward him, a glimmer of Parzival's question breaks through and enables the person asking the question to extend part of his own being beyond its usual boundaries.

Baruch Urieli, *Learning to Experience the Etheric World*

☞ Where I'm Coming From

The purpose of this booklet is to provide you with support in your understanding and practice of Compassionate Communication. It includes an overview of Marshall Rosenberg's Nonviolent Communication, a sketch of the participatory and onlooker modes of consciousness, lists of feelings and needs, and sample dialogues.

Waldorf education has been a central part of my life for over thirty years as a parent, class teacher, and student of Rudolf Steiner. I have devoted myself to seeing this education thrive for our children and our future. Coming out of this anthroposophical background, I have included some quotes and resources that have given me quickening insights into the essential nature of Marshall Rosenberg's work. I am particularly interested in the similarities I see between the activity of empathy and Goethe's scientific way of seeing.

☞ Choosing How We See

"If other people can make me angry, I am not master of myself—or better stated, I have not yet found my 'inner ruler.' In other words, I must develop the inner faculty of allowing impressions of the outer world to reach me only in ways that I have myself chosen. Only if I do this, can I become a student of higher knowledge."

Rudolf Steiner, *How to Know Higher Worlds*

To develop a practice of Compassionate Communication is to empower our *inner ruler* and to awaken this *inner faculty*. Through its awakening, we discover how to choose the meaning we see, particularly in our relationship to ourselves and others. Through that choice, we find we learn to increasingly suffuse our daily lives with greater understanding, equanimity and compassion.

New Meaning

What do you see in the graphic below? A chaotic pattern of black and white blotches? That's usually the first impression. At some moment,



however, we suddenly see something else. We see a giraffe. The sensory information hasn't changed but we see it differently. We see *new meaning*, meaning that was at first hidden. This meaning reveals the head of a giraffe. This revelation arises by way of an organizing idea—the concept *giraffe*—an idea we bring to our perception.

The same idea holds true in our speaking and listening. Compassionate Communication gives us a body of organizing ideas that enable us to see and *read* new meaning in our encounters with others and in the dialogues we have with ourselves. It gives us greater ability to foster understanding, connection and compassion. That is its intention, goal and possibility.

The Phenomenology of Communication

At the genesis of Compassionate Communication is an intention—the intention to connect such that everyone's voice matters, and what is alive for each is sacred. We focus on the basic phenomena present in our everyday communication. If we're clear and present, we discover four aspects, whether spoken or not, that are present: *observations, feelings, needs and requests*. Something happens that matters in our world, a feeling is stirred, we're aware that a need is calling, and we make a request. We *language* our becoming. We speak.

GOING FORWARD

What I want in my life is compassion, a flow between myself and others based on a mutual giving from the heart.

Marshall Rosenberg, Nonviolent Communication

We use the four phenomena of communication—*observations, feelings, needs and requests*—in order to be understood, in order to understand others as they want to be understood, and to create the quality of connection that enables everyone to get their needs met through natural giving.

At first, the step-wise structure of Compassionate Communication might seem a bit awkward. I would like to suggest a couple of ways to think of the model in the beginning. If it seems formulaic, think of it as a scaffolding that you'll use to build the temple; once the structure is secure, you can take it down, and move inside. We speak of it as the transition from 'classic giraffe' to 'street giraffe'. Each of us who seeks to learn this language longs for the day when we can begin to speak it with some fluency. When it sounds stiff and clunky, you can remind yourself you're learning a new language which at first, of course, you'll speak with a very thick accent. Think of it as empowering you to first visit and then reside in this new, compassionate land. I assure you that as you master these elements, you will naturally foster greater compassion in your life.

You saw in the parent-teacher examples given earlier that there are two reciprocal activities involved in a conversation—expressing what lives in us and seeking to read what lives in the other. At any moment we can choose to listen for feelings and needs. Every conversation becomes a weaving back and forth. We move from a self-connected inner emptiness to giving our presence unto the other, seeking to connect our becoming to their becoming, and participating together in the unfolding moment. As we weave this dance of presence, those core needs we have for understanding, connection and meaning come to be met with greater simplicity and ease. And for that, we celebrate. I hope this booklet has opened a door as you go forward in your life.

To keep that door open and develop a fluency in Compassionate Communication, I recommend taking a moment, three or four times a day, to practice self-empathy. I encourage you to attend workshops with a variety of trainers, find a local practice group, watch Marshall Rosenberg's videos, or study on your own. If you want to create your own practice group, many find Lucy Leu's book, Nonviolent Communication Companion Workbook, a useful resource.

May empathy awaken in our hearts—not I, but the other in me.

A CHOICE BEFORE US

ONLOOKER



INTENT TO CORRECT—Goal is to analyze situations, find what's wrong and correct it.

LIFE-ALIENATING—Tends to alienate us from what is alive in the moment in ourselves, in others and in the world.

HEAD—Thinking, speaking and listening from the head. Making judgments.

DEFY OR COMPLY—Reacting to external pressure. Conditioned to authority.

ALREADY BECOME—What's already become is intellectualized into discreet 'Its' and bits.

EXTRINSIC MOTIVES—Conditioned to act for reward and approval, or to avoid punishment.

POWER OVER OTHERS—Creating relationships where one person exerts power over another through fear, guilt or shame. Solutions are imposed.

MORALISTIC JUDGMENTS—What's good/bad, right/wrong.

"JACKAL"—Packs are organized based on the "top dog" enforcing a dominator/dominated hierarchical social structure; us/them gang or faction mentality.

A change in the way of seeing means a change in what is seen.

Henri Bortoft, The Wholeness of Nature

PARTICIPATORY



INTENT TO CONNECT—Goal is to create mutual understanding, enabling all needs to be met.

LIFE-SERVING—Tends to reconnect us to what is alive in the moment in ourselves, in others and in the world.

HEART—Thinking, speaking and listening from the heart. Sustaining connection.

CHOICE—Self-initiated activity in line with one's own feelings, needs and values.

BECOMING—Life is a process of becoming. We participate in the coming-into-being of the life.

INTRINSIC MOTIVES—Creating our own meaning and purpose while honoring the choices of others.

POWER WITH OTHERS—Creating relationships where everyone's needs matter and are considered. Lasting solutions address everyone's needs.

VALUE JUDGMENTS—Based upon values and needs.

"GIRAFFE"—Has the largest heart of any land animal; its long neck suggests courage, vulnerability and a broad view; and its saliva digests thorns into life!

☞ The Onlooker Matrix

Often, however, we're neither present nor clear about these four aspects. It's as if we're embedded in a matrix of language that mixes and muddles these basic phenomena and we end up languaging what's happening in ways that separate us. We're 'born into' a matrix of language—our cultural default setting—where evaluations mix with observations, thoughts with feelings, strategies with needs, and demands replace requests. We end up with expressions that focus on right/wrong, good/bad, *spiritually tactful* appropriate/inappropriate and the love affair with being right, defectivism and pathologizing. We excel at diagnosing what's amiss, analyzing, labeling, blaming and criticizing. In the onlooker matrix we're often left with crippled understandings, sabotaged connections and the fractious friction of all against all.

☞ A Participatory Vocabulary

In being human, each of us is gifted with universal human needs. An awareness of these needs grounds us in our common human experience and offers us a vocabulary to unlock a hitherto hidden dimension of human experience. It is a vocabulary that reveals and celebrates that each of us is simply in the process of becoming, and doing the best we can.

Individuality is always in the process of coming to be. The closer we can get to this sense of individuality, the more possible it becomes to also experience the world as always in the process of coming to be... The challenge of encountering the world through individuality is to meet the world through what we are coming to be, not through what we already know. This challenge is particularly acute in the domain of relationships.

Robert Sardello, Love and the Soul

From our first breath to our last, these human needs are rising: the need for meaning, understanding, connection; for safety, autonomy, integrity; the need to matter, to be seen, to be heard, as well as the profound need we have to serve life, to enrich life and to contribute to others; and, of course, the need to play. These needs come to presence in, and form a vocabulary for our becoming. They are alive within us at all times and stir us to action. As we gain literacy in reading these needs, we see with new eyes.

Our feelings are rooted in our needs and let us know how our becoming is going. They ground us in the present and, with practice, can become cognitive, a way of self-knowing. Together with needs, they form an archetype of human experience. As we practice Compassionate Communication, we discover that when seen in terms of our feelings and needs, we feel understood and connected. In that, empathy awakens.



RECEIVING WITH EMPATHY

The Nonviolent Communication Model

When you observe (see, hear, etc.)...?

OBSERVATIONS

Here we're listening for what may be triggering the other's reactions. What are they noticing?

Are you feeling ...?

FEELINGS

Here we're sensing what they might be feeling and checking to see if we understand. We participate in their present moment.

Because you're needing/you value...?

NEEDS

Here we're seeking to identify the needs that lie at the root of their feelings. What needs matter in the moment?

I'm wondering if...?

REQUESTS

Here we're guessing what they might be requesting. What might meet their needs?



AN EXAMPLE OF A TEACHER AT CHOICE

TEACHER SAYS TO PARENT: *"It seems like Jason is spending way too much time watching screens and he can't focus at all in class."*

TEACHER REPHRASES:

- **When I see** how Jason struggles to stay focused on his school work and he tells me he spends a lot of time at home watching TV or on the computer, and I reflect on what I've read about sensory-integration and child development. (observations)
- **I feel** concerned and helpless, (feelings)
- **Because I need** support for my efforts to protect this process of human development that happens in childhood. (need for support)
- **Would you be willing** to tell me what you're hearing me say? (a request)

PARENT BLAMES HERSELF: *"I'll never be a good enough Waldorf parent. I just can't do it all."*

TEACHER EMPATHIZES:

- **When I share** my concerns about Jason and his difficulty staying focused in class and how it might be related to his screen time, (observations)
- **Are you feeling** overwhelmed and discouraged? (feelings)
- **Because you're needing** some acknowledgment for your efforts, and some understanding for how difficult it might be to make some of these changes at home? (needs for acknowledgment & understanding)
- **I'm wondering if** you'd like to schedule some time for us to talk about how we might work together to support Jason? (request)

Empathy's Awakening

Baruch Urieli defines empathy as "interest in and compassion for our fellow human being; it enables us to extend our inner being into that of the other person and directly experience something of his essential nature." Surprisingly, the word *empathy* has only recently entered our language. Originally coined in 1912 as a translation for the German word *Einfühlung*—"to feel into"—Carl Rogers introduced the expression into the wider culture in the 1950s when he used *empathy* to describe a capacity he saw emerging in the younger generation.

If we can track the evolution of consciousness through the emergence of new words in a language—as Owen Barfield suggests in *History in English Words*—the arrival of the word *empathy* in our everyday language marked the arrival of a new reality in our midst. This new reality—empathy—is now opening up within our human community a new threshold in how we can meet, interact and inter-recognize each other. As a result, we can take this nascent capacity in hand and develop it into a social craft, becoming craftsmen of the heart. This is the threshold before us.

Compassion is the radicalism of our age.

Dalai Lama

The Pioneer

Marshall Rosenberg's life work, laid out for us in his basic book, *Nonviolent Communication: A Language of Life*, has pioneered the means to language this threshold. He uncovered the secret that enables us to accelerate the development of empathy. He did this by realizing that, at the heart of every packet of communication, there lies a universal human need. He then modeled for us how, by gaining fluency in the vocabulary of needs, we can change our way of seeing and co-create a participatory reality in becoming. We can see human becoming in its arising.

In empathy lies the seed for a new imagination of how we can meet in our shared humanity. Rumi spoke of the "land beyond right and wrong". Compassionate Communication offers us the languaging to meet and live in that land as we forge empathy, the art of leaping beyond oneself.

...man is beginning in our time to cross the threshold of the spiritual world in the natural course of his development. This means that our present-day consciousness, which is limited in its perception to the physical world alone, is gradually supplemented by a capacity to perceive the etheric world, the world of living process.

Baruch Urieli, *Learning to Experience the Etheric World*



EXPRESSING WITH COMPASSION

The Nonviolent Communication Model

When I observe (see, hear, etc.) ...

OBSERVATIONS

What am I observing? Is it muddled with evaluation? Is there spin?
Can I frame it so I can create common ground?

I'm feeling ...

FEELINGS

What am I feeling? Is it a feeling or a thought? Is it a faux feeling?
Am I sharing myself with the other?

Because I'm needing/I value...

NEEDS

What am I needing? What needs are calling for attention? Am I
confusing it with a strategy?

Would you be willing...?

REQUESTS

Am I asking for what I want? Do I want understanding, or do I have a
specific, presently doable request? Am I open to either yes or no?



AN EXAMPLE OF A PARENT AT CHOICE

PARENT SAYS TO TEACHER: *"The class is out of control and
my daughter is miserable."*

PARENT REPHRASES:

- **When I see** how unhappy my daughter is when she comes home and
tells me about some things that happen to her at school,
(observations)
- **I'm feeling** heartbroken and alarmed, (feelings)
- **Because I need** clarity about what's going on for my daughter. I need to
know that she is safe and supported at school. (needs for clarity and
doing what's best for one's children)
- **Would you be willing** to share with me what you see happening and the
steps you're taking to foster harmony among the children? (request)

TEACHER REPLIES IN FRUSTRATION: *"Parents expect teachers to do miracles.
Parents are so busy they're barely involved."*

PARENT EMPATHIZES:

- **When I bring** my concerns about Emily's unhappiness in school and
some of the behavior she has described (observations)
- **Are you feeling** overwhelmed and frustrated? (feelings)
- **And needing** some understanding around the challenges you face as
well as support for your efforts? (needs for understanding & support)
- **I'm wondering if** I've understood you the way you'd like and whether
there's something more you'd like to share? (request)

BEGINNING A PRACTICE IN EMPATHY

We can choose how we listen to, and make sense of, what comes to us.
If we reflect a bit, we see that our choices have quite different results. For
most of us, we respond out of habit, and as onlookers to the other. Through
Compassionate Communication, we have a choice to participate with them.

For example, suppose someone says to us, **"Do you have any idea
how thoughtless you've been?"** What are our choices?

When I hear this comment, I can choose to respond by...



Taking it personally. I internalize the judgment, blame myself
for being thoughtless, tell myself I should be more
thoughtful and begin a free fall toward shame, guilt and
depression. I choose, "I'm at fault and to blame."

Concluding I'm under attack. I interpret what's been said as
a critical judgment and react defensively. "That's not true.
What about what you did!" I choose that the other person
must be wrong and therefore to blame.

As an onlooker...

Or I have another option. I can choose to respond by...



Sensing my own feelings and needs. I can take a breath and
connect to whatever might be stimulated in me when I hear
what the other person is saying to me. I ask myself, "What
am I feeling: frustrated, confused, scared? What am I
needing: consideration, understanding, respect?" I choose
to empathize with myself. This is self-empathy.

Sensing the feelings and needs of the other. I seek to
sense what the person is feeling—frustrated? What the
person is needing—consideration? I might guess to see if I
understand them as they would like. If my guess "lands",
the person will feel understood. If not, they will say it again,
or give me more information. It's not about me guessing
correctly. I can try again. I am choosing to empathize. This
is empathy.

As we bring our intention into how we choose to participate in life's
arising, we cultivate the "inner faculty of allowing the impressions of the
outer world to reach [us] only in ways [we] have chosen" (Steiner). We gain
self-mastery.

*...[participatory consciousness] can be entered into by plunging
into looking, which means by a redeployment of attention into
sense perception and away from the [onlooker] mind.*

Henri Bortoft, The Wholeness of Nature

Participating in the life of...

ONLOOKER CONSCIOUSNESS: BEING RIGHT, AT ODDS & ALONE



This language is from the head. It is a way of mentally classifying people into varying shades of good and bad, right and wrong. Ultimately, it provokes defensiveness, resistance, and counterattack. It is a language of demands.

Marshall Rosenberg, Nonviolent Communication

JUDGING	<ul style="list-style-type: none"> • Moralistic Judgments • Good/Bad & Right/Wrong • Either/Or Binary Thinking
BLAMING	<ul style="list-style-type: none"> • Fault-Finding • Deviance Detecting
LABELING	<ul style="list-style-type: none"> • Classifying & Categorizing • Sexist, Racist & other Stereotypes • Making "You" into an "It"
OBEYING	<ul style="list-style-type: none"> • Denying Choice • Denying Responsibility • Conditioned to Authority
DESERVE	<ul style="list-style-type: none"> • Punishments & Rewards • Behavior Modification • Dominator/Dominated Mentalities
COMPARING	<ul style="list-style-type: none"> • Measuring, Testing, & Grading • Competing for Winners & Losers
BEING RIGHT	<ul style="list-style-type: none"> • Convincing & Persuading • Debating & Arguing • "Enlightening" Others Proactively
ASSUMING	<ul style="list-style-type: none"> • Interpretations, Analyses & Diagnoses • Jumping to Conclusions

The view that evaluates and assesses always does harm, whether it leads to positive results or not... The judgmental view forces a "You" into the world of "It."

Henning Köhler, Difficult Children: There is No Such Thing

The first request I call the "air traffic controller's request." It's about message sent, message received. We might frame it thus (and there are a variety of ways to phrase it): **Would you be willing to tell me what you're hearing me say?** We have taken some care in how we've spoken and we want to check to see that we've been heard as intended.

The second is an "invitational request." We've shared what's going on for us in the moment and with this request, we invite the other to share what's alive for them. It sounds something like this: **Would you be willing to tell what's coming up for you in hearing what I'm saying?** Or more colloquially: **What's coming up for you now?** With this request, we are saying that, yes, we have something coming up for us and, at the same time, we're interested in what's coming up for the other. In making this request, we prepare inwardly to give empathy.

☞ Gratitude

Marshall Rosenberg has said that all we say is "please" and "thank you." When we speak we either have a request arising out of one of our needs, or we are expressing our gratitude for something someone has done.

Compassionate Communication enables us to deepen and bring precision to the practice of gratitude. We do this by being specific about what was done or said (the observation), we share the feelings that were stirred in us, and identify those needs that were met.

For example: **When you arrive at the kindergarten whenever it snows and shovel a path for the children and families (observation), I feel relieved and grateful (feelings), because it meets my need for support and consideration (needs). Thank you!**

Rather than the positive evaluation—"You're so thoughtful"—we say what they did or said. We give them useful information. Through this practice, we come to recognize the many and various ways that we contribute to each other's lives. We also come to realize the power of the smallest deeds. When we receive such a gratitude we know exactly what we said or did that worked for the other person, and we tend to

It is important to develop the life of feeling. Gratitude, reverence and holy awe are feelings that in later life come to expression as the power of blessing, as out-streaming human love.

Rudolf Steiner, Rosicrucian Esotericism

PRACTICAL SUPPORT

☞ Self-Empathy

Compassionate Communication begins with self-empathy, when we self-connect. Whenever a feeling arises, we can ask ourselves these two questions: **What am I feeling? What am I needing?**

When we are able to self-empathize, we create a space of freedom between the stimulus and response. We deepen our presence in the moment. In relationship, when something happens and we take a moment to identify our own feelings and needs, we become freer to choose whether to express ourselves compassionately, or empathize with the other.

To learn Compassionate Communication, developing a daily practice of giving oneself empathy is an effective way to become literate in the vocabulary of feelings and needs, and disentangle from our habitual thinking and ways of reacting. Through self-empathy, we stay responsibly present to our own needs, and thus present for our life as it comes into being.

☞ Geography of Presence

Where is our presence in the moment? Is it in our thoughts, or in our perceptions? In Compassionate Communication, there is a geography of presence. When we give ourselves self-empathy, our presence is *here* with ourselves. When we meet another person and give them empathy, our presence is *over there*. This is the geography of presence.

Our work in groups can foster deeper connections when we consciously choose where we are giving our presence. When we are able, as a community, to give our undivided presence to the speaker until they have been understood, healing, simplicity, connection and efficiency will follow. When the speaker is *complete*, we can move our presence either to ourselves or another.

☞ Requests

For requests to be effective, they need to be concrete, presently doable, and framed in positive language. When we think about making a request, we usually think of requesting an action that would meet our needs. However, there are two helping requests that are very useful in serving the intention to connect.

PARTICIPATORY CONSCIOUSNESS:

FOSTERING UNDERSTANDING & PARTNERSHIP



...we learn to 'dwell' imaginatively in the form of living beings with a thinking that participates rather than remains as the external observer.

Nigel Hoffman, Goethe's Science of Living Form

- OBSERVATIONS**
- Are differentiated from **evaluations**.
 - State what is, without spin.
 - Are factual, observable phenomena.
 - Are what a video camera might record.
 - Support seeking common ground.
 - Welcome clarification from the other person.

- FEELINGS**
- Are differentiated from **thoughts**.
 - Give us information; thoughts interpret.
 - Voice how our becoming is going.
 - Are not caused by outer impressions.
 - Are not "I feel that...", "I feel like...", or "I feel you/she/they etc..."

- NEEDS**
- Are differentiated from **strategies**.
 - Are universal; strategies are personal & specific.
 - Language our human becoming.
 - Are at the root of our feelings.
 - Connect us to our shared humanity.
 - Foster compassionate connection

- REQUESTS**
- Are differentiated from **demands**.
 - Have no conditions; demands do.
 - Best be positive, concrete & presently doable.
 - Strive to meet everyone's needs.
 - Clarify what's been heard, what feelings are present, or what action might meet the needs.

The social aspect of the spiritual life demands that I open myself to the other, invite him to express himself in me. In this way I am able to experience his questions of inner development as my own.

Dieter Brüll, The Mysteries of Social Encounters

CORE FAMILIES OF FEELINGS**JOY & CONTENTMENT**

Adventurous	Curious	Giddy	Loving	Satisfied
Affectionate	Delighted	Glad	Moved	Stimulated
Alive	Determined	Grateful	Overjoyed	Surprised
Amazed	Eager	Happy	Peaceful	Thankful
Amused	Ecstatic	Hopeful	Pleased	Thrilled
Astonished	Encouraged	Inspired	Proud	Touched
Calm	Excited	Intrigued	Refreshed	Tranquil
Confident	Fascinated	Invigorated	Relaxed	Trusting
Content	Friendly	Joyful	Relieved	Upbeat

FEAR & ANXIETY

Afraid
 Alarmed
 Anxious
 Apprehensive
 Bewildered
 Cautious
 Concerned
 Confused
 Disconcerted
 Disturbed
 Dubious
 Embarrassed
 Impatient
 Jittery
 Nervous
 Overwhelmed
 Panicky
 Perplexed
 Puzzled
 Reluctant
 Restless
 Scared
 Shocked
 Stressed
 Terrified
 Worried

ANGER & FRUSTRATION

Aggravated
 Agitated
 Angry
 Annoyed
 Appalled
 Cranky
 Disgusted
 Exasperated
 Frustrated
 Furious
 Impatient
 Indignant
 Infuriated
 Irritated
 Resentful
 Upset

SADNESS & GRIEF

Bored
 Depressed
 Disappointed
 Discouraged
 Disheartened
 Dismayed
 Despairing
 Exhausted
 Helpless
 Hopeless
 Hurt
 Lonely
 Melancholic
 Sad
 Tired
 Troubled

FAUX FEELINGS

*Interpretations
 masquerading as feelings*

Abandoned	Ignored	Neglected
Abused	Intimidated	Put Upon
Attacked	Invisible	Rejected
Betrayed	Let Down	Rushed
Bullied	Manipulated	Unappreciated
Cheated	Misunderstood	Used

NEEDS: A VOCABULARY OF BECOMING**SUBSISTENCE**

Clean Air & Water
 Food
 Rest
 Shelter

PROTECTION/SECURITY

Fairness
 Honesty
 Justice
 Honoring Agreements
 Nurturing
 Openness
 Order
 Safety
 Stability
 Trust

PARTICIPATION

Accomplishment
 Action
 Belonging
 Capacity
 Community
 Competence
 Connection
 Dependability
 Encouragement
 Harmony
 Mutuality
 Opportunities to Help Others
 Power Within One's World
 Recognition
 Respect
 Support
 To Enrich Life
 To Serve Life

CREATION

Creativity
 Expression
 Inspiration

AFFECTION

Companionship
 Intimacy
 Kindness
 To Matter to Someone

IDENTITY/MEANING

Acknowledgement
 Appreciation
 Challenges
 Clarity
 Integrity
 Learning New Skills
 Privacy
 Self-Development
 Shared Reality
 To Be Seen For One's Striving
 To Be Seen For One's Intentions
 To Be Someone
 To Make Sense of One's World

LEISURE

Celebration
 Comfort & Ease
 Play & Fun
 Recreation

FREEDOM

Autonomy
 Choices
 To Speak One's Mind

UNDERSTANDING

Consideration
 Empathy
 Peace of Mind
 To Be Heard

TRANSCENDENCE

Beauty
 Love
 Peace
 Rhythm

Teaching With Love And Logic

9 Essentials for the Love and Logic Classroom® Curriculum

SMS staff will use the Teaching With Love and Logic program to supplement the discipline procedures outlined in the student handbook.

- (1) Creating classroom and school environments that stimulate responsible behavior and high levels of academic achievement;**
- (2) Preventing misbehavior and increasing instructional time on task;**
- (3) Avoiding power struggles while setting limits with challenging students;**
- (4) Teaching character and responsibility through the application of logical consequences instead of punishment;**
- (5) Developing positive, cooperative relationships with even the most difficult students and their parents; and**
- (6) Preserving the learning environment when one or more students become disruptive and unresponsive to preventative discipline.**

Neutralizing Student Arguing- learn

- **That arguing is one way that challenging students exert unhealthy control over classrooms and schools**
- **That arguing is one way that challenging students exert unhealthy control over classrooms and schools**
- **How adult-child arguments often contribute to the development of more serious acting-out behavior**
- **Why reasoning with arguing students is ineffective**
- **A practical skill for disengaging from arguments by repeating one statement like a “broken record”**
- **How to apply this skill with empathy instead of anger or sarcasm**

Delayed Consequences: learn

- **About research that shows why consequences do not always need to be immediate**
- **How to delay consequences in a way that yields the benefits of delayed consequences and immediate consequences at the same time**
- **That delayed consequences allow one to calm down, develop an effective plan, and avoid “knee-jerk” reactions**
- **Why repeated warnings are damaging to students and schools**
- **How to develop an enforceable classroom discipline plan**

Empathy: learn

- **How the human brain responds to threat by narrowing thinking and shifting into “fight or flight”**
- **That empathy is a powerful tool for helping students remain in “thinking mode”**

- That providing empathy before delivering consequences allows students to learn from the consequence...instead of developing resentment toward the adult
- Why empathy without accountability leads to irresponsibility and low self-esteem

The Recovery Process: learn

- How to use the “recovery area” approach to preserve the learning environment when one or more students become chronically disruptive
- The basic goals of this approach
- The importance of adapting this approach to their unique school
- What to do if a student refuses to go to Recovery when asked
- Related legal issues and tips for explaining this approach to parents

Developing Positive Teacher/Student Relationships: learn

- How coercive strategies and tangible rewards backfire with disruptive, resistant students
- That positive teacher-student relationships are the key to success with such students
- The difference between general praise and specific encouraging feedback
- The importance of greeting students each day with friendly eye contact, a smile and a handshake
- The “One-Sentence Intervention” technique for building successful relationships with the most challenging students

Setting Limits with Enforceable Statements: learn

- Why it’s important for educators to set fair and consistent limits with students
- How to set such limits in ways that decrease resistance and power struggles
- How to set limits that are easily enforceable
- Specific examples of enforceable limits, or “enforceable statements”
- How to enforce limits through the use of questions

Using Choices to Prevent Power Struggles: learn

- That a general sense of personal control is a basic human emotional need
- That most people will do almost anything to regain control
- How to share control to gain more of it
- Guidelines for sharing control through choices within limits
- Specific examples of appropriate versus inappropriate choices

Quick and Easy Preventative Interventions: learn

- **About research showing that effective teachers spend most of their time and energy preventing behavior problems instead of reacting to them**
- **Specific interventions designed to prevent disruptive behavior**
- **Guidelines for using preventative interventions versus using logical consequences**
- **The importance of addressing discipline on two levels: prevention of misbehavior and accountability for poor behavior**
- **That positive teacher-student relationships are the foundation of preventative discipline**

Guiding Students to Own and Solve Their Problems: learn

- **Five steps for helping students learn to own and solve their problems**
- **Why it's important that educators avoid rescuing students by solving their problems for them**
- **How to avoid resistance while helping students learn to problem-solve**
- **Guidelines for determining when to allow students to solve problems versus when to step in**
- **The importance of keeping our disciplinary discussions with students very brief**

August 15, 2013

APPENDIX V Whole Child Rubrics

Language Arts Assessment - First Grade

Objectives and teaching strategy: To begin the development of reading skills by using a rich array of verses, fairy tales and folk stories from around the world, told in a vivid and enlivened way. Many of these verses and stories are memorized and dramatized by the students who use them as the content for their written books. These books become their first readers.	Reading			
	Always	Often	Sometimes	Not Yet
Literature				
Shows enthusiasm and attentive behavior while listening to stories				
Comprehension				
Can retell a story				
Talks to others about a story and participates in discussions				
Creates projects (drawings and paintings) related to a story				
Can dramatize a story through acting and puppetry				
Uses pictures to make predictions				
Can select a favorite story				
Skills and Strategies				
Demonstrates knowledge of how print is organized and read				
Understands concept of reading from left to right/top to bottom				
Can identify the front and back of a book				
Can match some spoken words with print				
Identifies upper case letter names, shapes and sounds				
Identifies some high frequency words				
Demonstrates knowledge of phonemic awareness				
Identifies beginning, middle and ending sounds of words				
Can clap syllables in words and sentences				
Orally recognizes rhyming words				
Recognizes words that start and end the same				
Can substitute words in a rhyming pattern				
Can blend sounds into words				
Applies knowledge of letter-sound correspondences when reading				
Uses beginning and ending consonants and vowels when reading				
Recognizes some word families				
Reads unknown words using meaning cues (pictures, knowledge of the story, etc.)				
Uses decoding strategies (sounds out words, compares similar words, breaks words into smaller words)				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - First Grade

Objectives and teaching strategy: Waldorf-inspired students learn to read through their own writing. Therefore a strong emphasis is placed on the writing process. Unique to the Waldorf-inspired curriculum is form-drawing. Children begin by walking and gesturing the two basic forms, the straight line and the curve. These are carefully brought to the actual process of writing. They practice a diverse array of patterns, utilizing the line and curve which enhances the ability to write letters and measure spatial relationships used in writing. After several form drawing lessons, the students will make their own books featuring simple sentences and colorful illustrations, from the verses and stories told to them by their teacher.	Writing			
	Always	Often	Sometimes	Not Yet
Form drawing				
Can walk and gesture straight lines and curves				
Can draw straight lines, curves and patterns				
Skills				
Forms letters out of practice with form drawing				
Can copy written words from memorized verses and stories				
Organization				
Can organize ideas for simple sentences				
Can include facts and details with brainstorming for writing				
Can explain own drawings that tell a story				
Communication				
Can read and explain own drawings and writings				
Draws pictures about experiences				
Copies sentences from stories or verses				
Dictates own story or contributes to a group story				
Using conventions				
Writes using a left to right, top to bottom progression				
Can write own name				
Uses letters to write and copy				
Understands what the meaning of a sentence is				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - First Grade

Objectives and teaching strategy: Waldorf-inspired instruction relies heavily on oral presentation. The oral tradition is used for its ability to develop rich vocabulary and deepened inner comprehension as well as its ability to expand the listening and perceiving capacities of the student. Both the content of the speech and the articulation are conscientiously brought into the daily lessons.	Speaking and Listening			
	Always	Often	Sometimes	Not Yet
Speaking skills				
Recognizes rhythms and patterns of language in verses				
Uses correct pronunciation				
Speaks clearly and audibly				
Building a rich resource of words				
Uses an increasingly broad vocabulary				
Building comprehension through retelling of stories				
Participates in creative dramatics and choral speaking				
Respectfully takes turns when speaking				
Expresses ideas orally in complete sentences				
Developing higher thinking skills through retelling stories				
Listening skills				
Shows increased vocabulary and conceptual comprehension				
Uses pictorial thinking				
Shows an enthusiasm for the oral tradition				
Follows simple directions				
Recites short poems, rhymes, songs and stories with repeated patterns				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Second Grade

Objectives and teaching strategy: Reading instruction continues with the oral presentation of stories and verses which the children use to make their own readers. A stronger emphasis is given in the second year to word attack and decoding strategies. The oral tradition continues to allow the student to utilize a higher level vocabulary and deeper conceptual comprehension in their work than simplified lower grade texts and readers allow. Animal fables and legendary tales of virtuous and courageous deeds from cultures around the world are used.	Reading			
	Always	Often	Sometimes	Not Yet
Comprehension				
Responds to what has been heard or read				
Can retell stories and events using beginning, middle and end				
Describes and identifies the setting, characters or events				
Recognizes topic or main idea				
Relates previous experiences to what is heard or said				
Can make predictions about the content				
Restates ideas from the text				
Skills and Strategies				
Reads aloud familiar, grade appropriate materials				
Uses phonemic awareness and phonics to blend sounds for more complex words				
Can change beginning, middle and ending sounds of words to make new words				
Uses decoding strategies such as sounding out words, comparing similar words, breaking words into smaller words				
Uses phonics, meaning clues and language structure when reading				
Uses conventions of print (capitals and periods) to help oral reading				
Uses rhythm breathing and intonation that sounds like natural speech				
Uses rereading, cross checking and self-correcting to help reading				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Second Grade

Objectives and teaching strategy: Writing in the second grade continues to be centered around the children's handmade books and their form drawing. Children start to write their own sentences for these books as well as copying what the teacher has written. Simple punctuation and lower case/upper case distinctions are introduced. Cursive is usually brought in the final term of the year. Form drawing patterns become more challenging and continue to improve the spatial relationships and legibility required in the writing process.	Writing			
	Always	Often	Sometimes	Not Yet
Form drawing				
Draws complicated patterns of straight and curved lines				
Can draw and understand symmetrical patterns				
Skills				
Forms upper and lower case print and cursive letters				
Writes words on their own and copied from the board or dictation				
Communication				
Can organize ideas into sentences and simple paragraphs				
Writes simple paragraphs from stories they've heard or from their life experiences				
Paragraphs include appropriate details and stay within the assigned topic				
Can self correct spelling of familiar high-frequency words				
Corrects simple punctuation and capitalization				
Using conventions				
Uses simple, informative sentences				
Capitalizes the first word in a sentence and the pronoun "I"				
Uses correct punctuation at the end of a simple statement and question				
Attentive to proper margins, indentations and the appearance of the page				
Uses conventional spelling for high frequency words and those words with regular spelling patterns				
Can spell common sight words, basic reading vocabulary words and word families				
Can write from dictation of simple sentences				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Second Grade

Objectives and teaching strategy: The student's attentive listening span continues to improve as the stories, verses and games become more complicated. Clear articulation is individually encouraged through choral recitation of poetry verses, and dramatizations from the language blocks are still the main vehicle for student practice. During the retelling and discussion of the lesson content, respectful listening to others' points of view is emphasized.	Speaking and Listening			
	Always	Often	Sometimes	Not Yet
Speaking skills				
Speaks with clear pronunciation and enunciation				
Uses increasingly descriptive oral vocabulary				
Asks questions for understanding				
Responds to the questions of others				
Participates in group discussions				
Participates in choral reading recitation of rhymes, poems, songs and stories				
Participates in dramatics				
Retells stories in logical order				
Creates oral stories to share with others				
Listening skills				
Listens responsively and respectfully				
Follows simple two to three step directions				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Third Grade

Objectives and teaching strategy: Students continue to read from their own books, which they make from content given orally from the teacher. However, the narrative and compositional writing requirements for their books are increased. More published materials, both fictional and expository, are utilized. Hebrew legends, native tales and stories about the origins of living on the earth; farming, gardening, house building, animal husbandry are used. Suggested texts may include: Farmer Boy, Ox Carl Man and Miss Rumphius.	Reading			
	Always	Often	Sometimes	Not Yet
Comprehension				
Can read and respond to narrative materials				
Makes, confirms or reverses predictions				
Extracts significant information about settings, characters and events				
Can identify the problem or solution				
Recognizes topic, main idea and supporting details				
Relates what is read to prior knowledge and experience				
Asks and answers questions				
Can restate and summarize information				
Skills and Strategies				
Uses cueing systems, eg.: phonics, meaning, content to determine pronunciation and meanings				
Uses all decoding strategies mentioned in grade two				
Uses a rhythm, pace and intonation that sounds like natural speech				
Uses conventions of print, including commas, to facilitate oral reading				
Uses strategies such as rereading monitoring, checking, predicting and confirming and self-correcting to facilitate reading				
Vocabulary is developing				
Can determine the meaning of unknown words using context and dictionaries				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Third Grade

Objectives and teaching strategy: Students continue in their form drawing instruction and in the making of their own books. Narrative and compositional writing requirements are increased. Students are introduced to sentence structure, simple paragraphing, all punctuation markings, beginning grammar, and use of reference and research material.	Writing			
	Always	Often	Sometimes	Not Yet
Form drawing				
Draws complex patterns of straight and curved lines				
Draws mirror forms in four areas of 2-D space				
Organization				
Can organize ideas for writing				
Includes appropriate facts and details				
Stays with the assigned topic				
Can edit and correct spelling				
Can edit for appropriate capitalization and punctuation				
Can revise work to further develop the story in a variety of ways				
Communication				
Includes setting, characters and events				
Uses dialogue				
Includes beginning, middle and end				
Maintains a focus				
Understands the topic				
Organizes content				
Includes appropriate facts and details				
Uses descriptive words				
Maintains a focus				
Uses efficiency of expression				
Using conventions				
Spells high frequency words on third grade level spelling lists				
Spells using continued phonic work and encoding skills				
Uses complete sentences, both simple and compound				
Uses paragraphs to organize information and ideas				
Capitalizes proper nouns and words at the beginning of a sentence				
Uses correct punctuation at the end of a sentence				
Uses commas correctly				
Can identify and use nouns, verbs, adjectives and adverbs				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Language Arts Assessment - Third Grade

Objectives and teaching strategy: Students will further develop and expand their speaking skills through choral and individual speaking of the memorization of poetry, verse and selections from the lesson content. Dramatizations and class discussions continue with the emphasis on respectful listening.	Speaking and Listening			
	Always	Often	Sometimes	Not Yet
Speaking skills				
Speaks clearly and audibly				
Uses descriptive and expanded oral vocabulary				
Uses appropriate grammar and word choice when speaking				
Asks appropriate questions to gain information and maintain or clarify understanding				
Responds to the questions of others				
Paraphrases and summarizes information shared orally by others				
Clarifies and explains words and ideas orally				
Contributes to group discussions				
Uses increasingly complex sentence structure in oral communications				
Listening skills				
Listens responsively and respectfully				
Paraphrases and summarizes what has been heard				
Follows oral directions with three or four steps				
Understands other perspectives and points of view				

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Portfolio Assessment - Quality of Writing - Grade 4

Work selected from the student's portfolio are to be assessed as to the quality of the writing. Each category reflects the skills and standards that must be met at this grade level.	Exemplary	Commendable	Effective	Flawed	Not Yet
Mechanics Meets spelling, punctuation, capitalization, paragraphing and legibility standards. Shows appropriate editing, revision skills.					
Language Meets the standards of effectiveness and variety. Uses appropriate vocabulary. Shows understanding of nouns, verbs, adjectives and adverbs.					
Sentence structure Meets variety and quality of sentence standards. Uses complete sentences. Uses a variety of sentence structures.					
Content Meets standards of supporting detail. Uses dialog appropriately. Uses detail to develop characters, setting, plot.					
Organization Meets clarity and logic standards. Maintains a focus throughout piece. Shows organized draft, editing and revision skills.					
Thinking Meets development of ideas standards. Shows narrative development. Exhibits clear thinking.					
Task Meets the assigned choice of voice, audience, form or purpose.					

Project: _____ ☐ Most challenging ☐ Most original ☐ Best piece

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Portfolio Assessment - Quality of Writing - Grade 5

Work selected from the student's portfolio are to be assessed as to the quality of the writing. Each category reflects the skills and standards that must be met at this grade level.	Exemplary	Commendable	Effective	Flawed	Not Yet
Mechanics Meets spelling, punctuation, capitalization, paragraphing and legibility standards. Shows appropriate editing, revision skills.					
Language Meets the standards of effectiveness and variety. Uses appropriate vocabulary. Shows understanding of nouns, verbs, adjectives and adverbs.					
Sentence structure Meets variety and quality of sentence standards. Uses complete sentences. Uses a variety of sentence structures.					
Content Meets standards of supporting detail. Provides an engaging beginning to establish situation. Uses detail to develop characters, setting, plot.					
Organization Meets clarity and logic standards. Maintains a focus throughout piece. Shows revision skills that add detail and clarify meaning. Shows proofreading skills.					
Thinking Meets development of ideas standards. Shows narrative development. Exhibits clear thinking.					
Task Meets the assigned choice of voice, audience, form or purpose.					

Project: _____ ☐ Most challenging ☐ Most original ☐ Best piece

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Portfolio Assessment - Quality of Writing - Grade 6

Work selected from the student's portfolio are to be assessed as to the quality of the writing. Each category reflects the skills and standards that must be met at this grade level.	Exemplary	Commendable	Effective	Flawed	Not Yet
Mechanics Meets spelling, punctuation, capitalization, paragraphing and legibility standards. Shows appropriate editing, revision, proofreading skills.					
Language Uses appropriate vocabulary. Uses a variety of literary techniques. Shows understanding of noun and verb phrases, independent/subordinate clauses.					
Sentence structure Meets variety and quality of sentence standards. Uses a variety of sentence structures.					
Content Meets standards of supporting detail. Shows ability to explain and describe using different perspectives, compare and contract, object/subject. Shows ability to write to persuade. Uses visuals or graphics as appropriate.					
Organization Meets clarity and logic standards. Shows a controlling idea throughout piece.					
Thinking Meets development of ideas standards. Shows narrative development. Exhibits clear thinking.					
Task Meets the assigned choice of voice, audience, form or purpose.					

Project: _____ ☐ Most challenging ☐ Most original ☐ Best piece

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Portfolio Assessment - Quality of Writing - Grade 7

Work selected from the student's portfolio are to be assessed as to the quality of the writing. Each category reflects the skills and standards that must be met at this grade level.	Exemplary	Commendable	Effective	Flawed	Not Yet
Mechanics Meets spelling, punctuation, capitalization, paragraphing and legibility standards. Shows appropriate editing, revision, proofreading skills.					
Language Uses appropriate vocabulary. Uses a variety of literary techniques. Shows understanding of conjugation of verbs, regular/irregular verbs.					
Sentence structure Meets variety and quality of sentence standards. Shows understanding of simple/compound/complex sentences, phrases and clauses.					
Content Meets standards of supporting detail. Shows understanding of first person narratives. Shows understanding of simile and metaphor.					
Organization Meets clarity and logic standards. Shows a controlling idea throughout piece that conveys a perspective on the subject.					
Thinking Meets development of ideas standards. Shows narrative development. Exhibits clear thinking. Shows ability to analyze ideas.					
Task Meets the assigned choice of voice, audience, form or purpose.					

Project: _____ ☐ Most challenging ☐ Most original ☐ Best piece

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

Portfolio Assessment - Quality of Writing - Grade 8

Work selected from the student's portfolio are to be assessed as to the quality of the writing. Each category reflects the skills and standards that must be met at this grade level.	Exemplary	Commendable	Effective	Flawed	Not Yet
Mechanics Meets spelling, punctuation, capitalization, paragraphing and legibility standards. Shows appropriate editing, revision proofreading skills.					
Language Uses appropriate vocabulary. Increased use of free essay. More emphasis on exact descriptions.					
Sentence structure Meets variety and quality of sentence standards. Shows understanding of infinitive and infinitive phrase, gerund and gerund phrase, participle and participle phrase.					
Content Supporting detail. Shows understanding of different writing forms. Uses elements such as plot, point-of-view, setting, conflict and characters to establish a situation.					
Organization Meets clarity and logic standards. Shows a controlling idea through piece that conveys a perspective on the subject.					
Thinking Meets development of ideas standards and clear thinking. Shows ability to analyze ideas by looking at them from multiple angles and through deeper layers of meaning.					
Task Meets the assigned choice of voice, audience, form or purpose.					

Project: _____ ☐ Most challenging ☐ Most original ☐ Best piece

Student: _____ Teacher: _____ Fall ☐ Spring ☐ 20 ____

August 15, 2013

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SYRINGA MOUNTAIN SCHOOL

Cultivating the Head, Heart and Hands

A Petition to Establish a Public Charter School Beginning in August of the 2014–2015 school year. Opening with Grades K–5 the first year and adding additional grades each subsequent year through 8th grade within or near the city of Hailey, Idaho

Available to all Idaho students with a primary attendance area consisting of Blaine County School District No. 61

Submitted to Public Charter School Commission May 17, 2013

Revised and resubmitted July 16, 2013

Contact: Dr. Mary Gervase,
208-720-6327,
Post Office Box 3531, Hailey, Idaho 83333
marymgervase@yahoo.com

Syringa Mountain School does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs, including vocational programs, in accordance with Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Educational Amendments of 1972; and Section 504 of the Rehabilitation Act of 1973, as amended. Any variance should be brought to the attention of the administration through personal contact, letter, phone, or mail.

August 15, 2013



Blaine County School District # 61

118 West Bullion Street – Hailey, Idaho 83333

Phone 208.578.5000 – Fax 208.578.5110

www.blaineschools.org

June 3, 2013

Michelle Clement Taylor School Choice Coordinator
State Department of Education
P.O. Box 83720
Boise, ID 83720-0027

Dear Ms. Taylor:

Blaine County School District #61 was contacted in the fall of 2012, by Dr. Mary Gervase, asking for a meeting with the Board Chairman, Mr. Steve Guthrie and the Superintendent of Schools, Dr. Lonnie Barber, to discuss the future formation of a new charter school, Syringa Waldorf Mt. School, in Blaine County.

On October 13, 2012 Dr Gervase and parents presented an initial overview of the new charter school. This presentation was well received by the Board of Trustees and a subsequent two hour learning session was conducted by Dr. Gervase and the Board of Trustees. This learning session, held on April 25, 2013, provided greater detail on the school, allowed for an extended question and answer session and also allowed for in-depth board discussion regarding the establishment of the new charter school.

On April 30th the Blaine County School District received a formal request for a hearing before the Board of Trustees at the May regular board meeting. This request was granted and Dr. Gervase and parents from the proposed charter school formally presented their request to be chartered by the Blaine County School District on May 14, 2013.

While the Blaine County School District does support the efforts of the Syringa Mt. School to gain charter status, and after much thought and deliberation, the Board of Trustees passed a motion to move that request through to the State Charter Commission for possible charter status. If I can be of further help or assistance please feel free to contact me at 208.578.5000
Sincerely,

Dr. Lonnie Barber, Superintendent, Blaine County School District #61

CC: Steve Guthrie, Chairman, Blaine County Board of Trustees

Don Nurge, Vice Chairman, Blaine County Board of Trustees

Dr. Mary Gervase, Director Syringa Mt. School

August 15, 2013



THE BOARD OF BLAINE COUNTY COMMISSIONERS

206 FIRST AVENUE SOUTH, SUITE 300

HAILEY, IDAHO 83333

PHONE: (208) 788-5500 FAX: (208) 788-5569

www.blainecounty.org bcc@co.blaine.id.us

Lawrence Schoen, Chairman * Angenie McCleary, Vice Chair* Jacob Greenberg, Commissioner

July 11, 2013

Dear Members of the Public Charter School Commission:

Please accept this letter expressing my support for Syringa Mountain School, a proposed Waldorf methods charter school for the Wood River Valley. As a Blaine County Commissioner, the health, education and welfare of the youth of this county is very important to me. Although Blaine County prides itself in the quality of education our public schools provide, there is interest in expanding the educational choices offered within the public school system and I support the families and children having a diversity of educational opportunities.

The proposed charter school would provide a unique yet rigorous education. It is a researched based model that redefines our view of education to include the head, heart and hands and focuses on improving and enhancing the full child-their cognition, social/ emotional health as well as physical being. This education is offered in a natural setting that educates the children about sustainability and the value of the earth and all living things. This would be the first public Waldorf School in Idaho. This endeavor is being spearheaded by a well respected and experienced educator, Dr. Mary Gervase, who served as the Assistant Superintendent for the Blaine County School District for eight years and is still highly regarded by our community and by the state.

I think the Syringa Mountain School would provide Blaine County families with an additional and exciting new educational opportunity. I hope you will find as I have that this charter school warrants your endorsement.

Sincerely,

A handwritten signature in blue ink that reads "Angenie McCleary".

Angenie McCleary
Blaine County Commissioner

Subject: charter school application
From: Wendy Jaquet (wendyjaquet@yahoo.com)
To: Tamara.Baysinger@osbe.idaho.gov;
Cc: marymgervase@yahoo.com;
Date: Friday, July 5, 2013 4:31 PM

Hi Tamara,

I have been asked to write a letter of recommendation for the Syringa Mountain School charter application that you will be reviewing at your August 15 meeting.

I support the application, but wanted to comment on a few concerns that have been brought to my attention:

1. The parental support from the previous school has been exemplary. A friend of my son's said he has been helped in parenting - since he experienced very poor parenting, this is very impressive.
2. The Waldorf model is a practice that is different that what is taught at the Blaine County Schools and is therefore, in my mind, relevant to the true spirit of the charter school movement - incubators for different practices. This was why I voted for the charter school legislation in the beginning and did not support in subsequent years because it seemed like we were creating parallel tracks and diminishing financial support for the traditional public schools and not following the incubator model.
3. The Waldorf model apparently does not teach early reading readiness and hence children go through the model in a sequential fashion and learn reading/etc as they get closer to the 8th grade or perhaps earlier. My concern is that the school is starting out with just the lower grades, but I believe they intend to add grades as the school progresses.
4. In going door to door in 2008 I was pleased to talk to so many parents in the Hailey Bellevue communities who were sending their children to the Mountain school, a predecessor to this application. I also met several outstanding teachers. This affirms my belief that this choice will be well received in the community.
5. The charter should take some pressure off the building program that has been undertaken by the traditional school. The property taxpayers in the community will be grateful. The percentage of the tax bill in Blaine which goes to schools is high and especially high for the non resident owners who have high values.

Thank you for the opportunity to comment.

Wendy Jaquet

Subject: Letter of support
From: Hallie Kelly (hkelly@lplearningcenter.org)
To: marymgervase@yahoo.com;
Date: Monday, July 15, 2013 7:46 PM

Hallie Kelly Star and Selim Star
740 Buckhorn Drive
Hailey, Idaho 83333
halliekstar@gmail.com
208-720-1357

July 15, 2013

Dear Idaho Charter Commission:

It is with whole hearted conviction that we write this letter of support for Syringa Mountain Charter School. As parents of two boys ages 6 and 7, who have both been attending The Mountain School and receiving instruction in the Waldorf method for the last two years, we have seen the highly effective and individualized method of instruction that this form of education offers. Not only have we experienced first hand the high levels of academic achievement that both of our boys have attained, but we have also witnessed the equally important social and emotional development of our children as well.

It is important to add that our older son, who will be entering second grade this fall was on an IEP for preschool and will likely return to IEP status if the charter is approved as a public school of choice. Not only will he require an IEP, he will also require Gifted and Talented Services as he is Twice Exceptional (2E). Given our experiences with Waldorf education and the leadership at Syringa Mountain Charter School, we will enroll our 2E son and his brother without reservation once the charter is approved as we have complete confidence in Syringa's ability to provide our children with the absolute best education available.

As parents who have already benefited from this little known educational methodology, we strongly urge you to research and learn about Waldorf education, as it has potential to improve educational opportunities for all students in Idaho. We believe strongly that there is a need for school choice in Blaine County and that Syringa Mountain Charter School will not only be successful, but serve as a model for the state.

Respectfully,

July 9, 2013

To Whom It may concern:

When our son (now 9 years old and just completed third grade at The Mountain School) was to begin public school kindergarten, he was so excited for his first day! School started...and all of the excitement ended after two weeks. Almost every day he would cry before school started. We inquired to the teacher that perhaps Cree needed more time at home and that full day kindergarten was a bit much. We were assured that was NOT the case and that pulling him out of school early would hinder his learning. We kept him there. There were days after drop off when I would sit in the hall of the school crying because Cree was so sad. There were days when the aid would pull Cree out of my arms and assure me that he would be "fine". He wasn't fine. He cried. He was sad. He didn't like school. He was unhappy.

We decided he was young and would mature and be a different child in first grade. First grade...he cried, almost daily. He was labeled ADHD by his teacher and we were told to take him to the doctor for a formal diagnosis so he could get treatment and from then on he would have a card that would label him through high school so all teachers were alerted that he needs special attention. What?!...Cree? ADHD?! We were in shock. Cree didn't behave this way at home. He wasn't fidgety, rude and a bother to all. Why was he acting this way in school? There were 24 students (16 boys) in his class with one teacher and a part time aid. The children's desks were grouped in fours. Children were leaning over their desks to get to their friends desks. There was constant chatter. There was a reading test every morning of every day with test results by the child's name hung on the wall. We wondered, would anyone feel comfortable and happy here?

I began reading books on boys and how they learn. I began feeling that Cree did not have ADHD. We met with the principal to discuss Cree and the different styles of learning (specifically for boys) and after an hour long meeting I asked him if he knew he was fidgeting with the Kleenex box during our entire meeting. He was surprised by my comment and pushed the Kleenex box away. I explained that boys learn with movement and that when "Tommy" was reprimanded for tapping his pencil during a math lesson, he was actually keeping himself alert to learn the lesson.

Over the two years that Cree was at public school, I spent much time there...sometimes I would roam the halls and listen in on classrooms. I would meet Cree for lunch and stay for recess. I was a parent helper in the classroom. I attended PTA meetings. I heard disturbing comments from teachers. I heard teachers yell across the

August 15, 2013

room at children. I watched a lunch room lady come unglued because the children were talking too loud in the lunch room (gymnasium without sound proofing). After screaming at the children she made a threat, turned off the lights and stomped to the back of the kitchen. I had listened to a parent tell me how happy she was that her child was labeled ADHD so now he has "special" attention the rest of his school years. I was at recess when a little boy came running to me asking if I could help his friend who was just thrown to the ground by an older child and then took his teddy bear. As I went to the boy, I searched for recess staff...she was talking on her cell phone and was oblivious to the incident. In kindergarten, Cree was bullied by a classmate. No one knew about it until we told the teacher and asked for help for the other child.

I began researching other ways children learn. Children learn and succeed at a much greater level when in a nurturing environment. We wanted something different for our child. We left the public school in search of a better place. But what other free options were there?

This is when The Mountain School (TMS) came into our lives. We were given a scholarship and put the remaining balance of the tuition on a credit card. This is what TMS has done for our son, our family... No crying. No sadness. Joy! Stories to tell. Roles in plays. Love. Nurturing! Conflict Resolution. Math recitals. Lasting friendships. Listening. Violin playing. Warmth. Singing! Calm. Spanish speaking. Teaching to all students yet...individually. Care. Compassion. True understanding of each child. Patience. Learning with physical activity!

I'm surprised at the number of people who feel my pain when I tell our story and who also feel there is no other option to public school. Bringing another free choice to parents and their children is invaluable. One size does not fit all.

Thank you for being open minded and considering Syringa Mountain School for charter.

Sincerely,

Jen and Dave Johanningmeier, 1141 Broadford Rd., Hailey, Idaho

August 15, 2013

Date: July 12, 2013

Letter in support of proposed new Syringa Mountain Charter School, Blaine County, ID

Dear State of Idaho Charter School Commission:

We are submitting this letter as residents and taxpayers of Blaine County, Idaho and as great supporters of educational choice and of the newly proposed Syringa Mountain Waldorf Methods School.

When we think back to what brought us to a Waldorf methods school we reflect on some of the struggles our daughter was having with the public school system, realizing there had to be a different approach to education, one that was more suited to her learning style and her wondrous and sensitive spirit. Waldorf educational methods instantly captured our daughters curiosity and enthusiasm, nurturing her development, providing meaningful educational and artistic experiences and allowing her to be successful as a student.

There are many things we cherish about the Waldorf education system. Below are just a few examples of why we are so happy to have the exposure and availability of these teaching methods in Blaine County and why our choice would be to have our daughter, an incoming fourth grader this fall, at the new Syringa Mountain School:

The beginning of a school day at a Waldorf School allows time for the children to warm up into the day of learning with movement, rhyming, singing, and other classroom activities that encourage learning through experiences. These early morning activities bring forth the priors days lessons with laughter and joy, and get the blood and brain juices flowing prior to engaging in the day's main thinking lesson, which requires concentration and stillness. Allowing time for this warm up period allows the children to wake up and come into their bodies and environments without asking for immediate focus, attention and stillness. Things which, as adults, many of us are not able to accomplish in our daily professional lives without first having a moving and warming up period.

We love the emphasis on outdoor learning and lessons in nature and on the farm. These daily connections to nature allow children time to explore the world around them, learn about plants, animals and wilderness skills, and develop a respect for all creatures they may encounter. These explorations allow natural curiosities to grow and for The children to be involved with and connected to their environment, as all children should be.

We love how art, music and movement are incorporated into all facets of learning. They are integrated into language arts, science and mathematics. Additionally, problem

August 15, 2013

solving and group work is brought into all lessons and children learn and build upon these important life skills from early ages.

We feel a strong sense of belonging and community with Waldorf education. The children are taught to be sensitive of others, inclusive in their play, and to work differences out with each other. This leads to respectful and strong relationships being formed and the kids learn to depend on and praise each other in their successes. Watching the Waldorf school kids play together gives us incredible insight to what is being fostered in Waldorf education. We see creative, imaginative play where no one is left out and there are rarely emotional outbursts. These methods create an educational space that is calming and supportive, instills a love for learning, and captures our daughter's curiosity. It encourages her explorations, teaches her self-responsibility and has given her a community that embraces her spirit. We cannot imagine a better place for her to be every school day.

Finally, our daughter is thriving in this educational environment and most importantly loves and wants to be at school every day. She is eager in the morning and is fully engaged.

It is our strongest hope and desire that the Commission is in favor of the Syringa Mountain School Charter School, in Blaine County. Thank you for listening.

Sincerely,

Matt and Bobbi Filbert

August 15, 2013

July 7, 2013

Dear Charter School Commission,

We are writing to express our strong support of the authorization of Syringa Mountain School for the Blaine County School District.

As parents of two children in the district, we see an urgent need for a public Waldorf Methods charter school for our children. We feel our current public schools, though strong in some academic areas are not keeping children interested or engaged in the learning process even through the early grades, and are lacking in teaching to the whole child. We have been so very fortunate to experience first-hand, how a Waldorf inspired form of education truly nurtures the whole child – the intellect through a rigorous academic curriculum, the emotional side through compassion for classmates and the need to work together on collective projects on a daily basis, as well meeting the physical needs of children and the huge benefits that combining cognitive work with physical movement can bring to a child's developing brain. These cornerstones of the proposed Syringa Mountain School philosophy are wrapped in art and imagination as they are presented to the children, filling them up on a daily basis with wonder and enthusiasm for learning that I believe will last a lifetime.

We ask that you please authorize this new, free, public school of choice so that all children interested in an alternative elementary public school education in the Wood River Valley, will have this amazing opportunity.

Sincerely,

Svea and Chris Grover

Mountain School Administrator and Blaine County Parents of two elementary age children

911 Eastridge Dr.

Hailey, ID 83333

August 15, 2013

July 12, 2013

To Whom It May Concern:

Our journey with the The Mountain School began in 2006 when our oldest child was 18 months old. Immediately we found that this style of education was a perfect fit for our family and we have been deeply involved with the evolution of the school ever since.

The Mountain School has been an incredible place for our children to fully explore themselves and the surrounding world in a nourishing, loving, and developmentally conscious way. Their passion for learning has been fostered through the Waldorf inspired curriculum and it has been such a gift to watch them grow in a heartfelt way.

The commitment and care that the teachers show our children is something we wish for all children. At the festivals and school performances we often shed tears around the bitter-sweetness of how fortunate our children are, and how so many other children could benefit from the loving attention and wholesome environment that the Mountain School provides.

It is for these reasons that we hope the state will seize this opportunity to support the development of the Syringa Mountain School, in becoming the first Waldorf inspired Charter School in Idaho. Thank you for your support in this process.

With unwavering support,

Paige and Ryan Redman

August 15, 2013

Dear Charter School Commission,

I'm writing this letter in support of the Syringa Mountain School, which is currently awaiting approval for charter status. I've been an elementary school teacher for nine years, and have three children of my own (ranging from three to six years old). While our school district has some positive things to offer, I've seen far too closely a distinct lack of ability to meet the needs of its children. Too many children fall through the cracks of a system that isn't serving them; whether it be socially, emotionally, academically; or variations of all three. Nationwide, we continue to see disturbing evidence that our children and teenagers are crying out for better guidance. It is time for our nation's educational institutions to step in and create the shift for which our society is desperate.

Discovering the Waldorf methodology and finding it here in our very own community is such a blessing! This is exactly the type of instruction that our children need. The Waldorf curriculum is designed with the child in mind; teaching concepts when the child is developmentally ready (both cognitively and emotionally). Concepts are taught in a meaningful way; spiraling academics, art, handwork, music, natural studies, and movement together in a seamless way. The proposed Syringa School will even have a working garden and biodynamic farm on site to further connect the children to their studies. Educating the whole child is what needs to be happening, and I love that Waldorf methods teach to the "head, heart, and hands."

I fully believe if our nation adopted this methodology, that our society would foster those who valued compassion, reverence, lifelong learning, intellectualism, problem-solving, and interconnectedness. It is my hope and desire to be able to offer this wonderful educational model to my children and to the children of the Wood River Valley. Thank you so much for supporting the Syringa School in its endeavors to become a charter school.

Warmly,

Amy Schlatter

August 15, 2013

6 July 2013

This is a letter of support for the proposed Syringa Mountain School- a Charter School here in the Wood River Valley.

My daughter currently attends TMS- our private Waldorf inspired school and will be entering 1st grade. This will be her 4th year in attendance. Over these four years, I have seen her soul flourish and her love of learning blossom. The rigorous liberal arts curriculum, deeply responsible and compassionate community of peers and families, and the engaging "real" environment (animals/farm, garden, festivals,...) provide a unbeatable option for whole learning. A Waldorf inspired curriculum is the best option for our family and we would consider relocating or home schooling if this option was not available. This model of education has become a living part of our daily life and family rhythm.

Professionally, I am a Licensed Clinical Professional Counselor and work with many families, couples, and children here in the Wood River Valley. From my professional experience, I see the tremendous need for alternative education and community based options. I have deep concern for the lack of meaning and confidence that I often see in the faces of children and teens. Families often feel "something is missing" from their education experience or more concerning, their children's educational experiences may be causing excess stress, lack of confidence, peer challenges (bullying, etc.), lack of meaning or attention,... In addition, parents often feel as though their children are not understood or met with their unique needs and that the children are not able to really thrive within the current public choices.

I see the complete opposite when I spend time at TMS. I see bright eyed children who have a genuine interest in others and the environment. I see children who are valued for their uniqueness and allowed to utilize their strengths and explore their challenges (weaknesses). I see confident children who have fun while developing a diverse skill set (animal husbandry, handwork, language, art and music...). I see children who care about each other and respect other. In fact, when there are conflicts between students, I see how they honor each other and work through differences rather than degrade each other. Most of all, I see children who are hungry to learn and who are eager to engage with life.

I urge you to consider Syringa Mountain School's Charter application. More families need a publicly funded option. And more importantly, we need a world filled with these kinds of children.

Thank you for your consideration.

Sincerely,

Carrie Thomas Scott, mother of Cora Faye Scott, 6 years old

August 15, 2013

Carrie Thomas Scott, MA, LCPC
Certified Hakomi Therapist
Registered Supervisor
302A Pine Street Station
P.O. Box 1121, Hailey, ID 83333
(208) 721-0531

August 15, 2013

From: Will Stapp <wrstapp@gmail.com>
To: marymgervase@yahoo.com; stephanie skinner <alliance.public.waldorf@gmail.com>
Sent: Monday, November 5, 2012 5:52 PM
Subject: Re: Please clarify the copyright issue with Waldorf?

Dear Mary,

There is a long history here and things currently in negotiation with AWSNA as well. The short version is that although the Alliance has historically disputed the AWSNA's claim to the legitimacy of service mark as it applies to public schools, we have respectfully has encouraged member schools not to use "Waldorf" in the name of the school. We are currently in renewed conversation with AWSNA (after a 5-year hiatus) and exploring the possibility of working together to protect the integrity of Steiner's educational impulse in North America, especially as it manifests in the public as opposed to independent arena. Its an issue that is very close to my heart.

I encourage your group to join the Alliance sooner than later and hope you send a group to our January conference. You can join as an initiative. It puts your group in a better position to access Alliance resources and makes a statement about your commitment to make the education real in the public sphere. The conference is a great opportunity to meet people who could share some hard won pearls of wisdom as your start-up works through the developmental stages.

I would be willing to field a few more questions regarding terminology if you want to give me a call at 707-486-4349.

Sincerely,

Will Stapp

August 15, 2013

July 5, 2013

To Whom it May Concern,

I have taught in the Blaine County School District for ten years. My husband teaches for the Idaho Virtual Academy. Our four-year-old son began attending The Mountain School in September 2012. I also began teaching Spanish for TMS at this time. I have never before been immersed in such a warm, loving, student centered educational environment. It is apparent that the children at TMS love their school, their teachers, and the beautiful way in which they are learning. When you walk onto the campus of TMS, there is a sense of community, reverence, and respect. We would like for our two children to attend the Waldorf inspired Syringa Mountain School for as long as possible! We urge you to please approve this charter school so that the Wood River Valley has a beautiful and holistic educational alternative. Thank you so much for your consideration.

Sincerely,
Amy Jonas and John Benson

August 15, 2013

***As of July 17th, Liz is now a Trustee of the Blaine County School District.**

July 9, 2013

Idaho Public Charter School Commission
PO Box 83720
Boise, ID 83720-0037

Re: Syringa Mountain School Charter Application

To Whom It May Concern:

I would like to extend my strong support for the petition of Syringa Mountain School to become the first charter school in Blaine County.

During the past few years that The Mountain School has been in existence as a private school, I have observed first-hand how a Waldorf-based education has provided many Blaine County children with an enlightened education of the highest quality. I believe that all children, regardless of financial means, should be able to attend this type of school; public charter school status would make this possible.

For these reasons, I urge you to approve the Syringa Mountain School charter school petition. Thank you.

Sincerely,

Elizabeth Schwerdtle,
Hailey, ID

Subject: Letter of Support

From: Tener Rogers (tenerrogers@yahoo.com)

To: Svea@themountainschool.info; marymgervase@yahoo.com;

Date: Friday, July 12, 2013 1:43 PM

To Whom it May Concern,

As co-chairman of The Mountain School Parent's Association for the past two years and mother of two students, I have witnessed first-hand the transformative power of the Waldorf methodology. As a member of the broader community, I recognize its potential to complement the more traditional approach employed in our public schools. The focus on teaching to the whole child and helping them understand their place in the world engenders self-confidence, creative problem solving, as well the ability to empathize. Perhaps most importantly, it ignites a life-long passion for learning. As William Butler Yeats is quoted, "education is not the filling of a pail, but the lighting of a fire". With your grant, I wholeheartedly believe that the proposed charter school, Syringa Mountain School, will succeed in enriching the lives of our children and, in doing so, strengthen the fabric of our community. Thank you for considering our application.

Tener Rogers Co-Chairman, The Mountain School Parents Association

Subject: FW: letter of support
From: TMS office (admin@themountainschool.info)
To: marymgervase@yahoo.com;
Date: Monday, July 15, 2013 11:27 AM

-----Original Message-----

From: Mac User [mailto:mundonim@gmail.com]
Sent: Friday, July 12, 2013 3:18 PM
To: admin@themountainschool.info
Subject: letter of support

Dear State Charter Commission,

This is a letter of support for funding of the Syringa Mountain School.

My husband and I have two children and are both movement instructors and business owners in the Wood River Valley.

Our daughter has attended TMS for the past two years and we hope to have our son enrolled for the 2014 school year as well.

During our time at the school, my daughter has thrived in the Waldorf program with its caring teachers, nurturing environment and strong community.

We would not be able to afford continuing education at TMS without state funding.

Thank you for your time and consideration.

Sincerely,
Oliver Whitcomb and Amy Clifford

August 15, 2013

The remainder of the letters in the packet are newly added as of August 1, 2013. The first group of letters date back to December 2012. They are followed by two letters, one from a board member and one from a prospective board member, both of whom are referred to in the Appendices. Additionally there is a garden grant announcement that was received in May 2013 and will be utilized once the school identifies a site. And lastly, a letter from a second Blaine County School District Trustee, Kathy Baker , who was sworn in at the July 2013 Board meeting.

With the closing of The Mountain School, the parents were asked to consider sending notes to the Woods Family and school staff relating what Waldorf education has meant to them. The letters that follow are a taste of what is to come as Syringa Mountain School becomes established. These were compiled in December 2012.

August 15, 2013

To Kate, the teachers, TMS Board of Directors and all the very special beings that make The Mountain School - here is our little story of our grand experience.

After months of worrying about my sweet little Nova, a recently turned five year old, change came to us or maybe we came to it :). Not quite sure which one. Nova had starting off on her own into this big world attending public school, and as her mama I could see the amount of discomfort she was in. My little girl became sad, angry and all together unhappy. I was having a hard time understanding the change in Novas attitude toward not only myself but most others. She was complaining daily and she was lacking the words to express what she was going through which not only frustrated her but me also. My husband and I are both working parents and so when I say we continued to push through the struggles I think it can be understood by most patents. Nova is our only child and life changes are always continual. I tried loving her more thinking that she would come around but deep inside I was hurting more than I was even consciously aware of. After a few recent and consecutive negative happenings at school I was at my end. I wasn't sure what would happen but I knew that we both needed a change because "school" was becoming a very negative part of our everyday.

It happened in only a few short moments. I believe that my heart led me to The Mountain School. I had just dropped Nova off at school and was headed home with sadness in my heart. In my mind I could still see her little face looking up at me and hear her saying "please mama, just stay with me at school today!" I wish I could say that didn't happen often but the truth is it happened every day. On this particular day my heart was driving the car. I live in the same neighborhood as TMS so when I turned into the parking lot it seemed beyond natural. I stepped out of the car not quite knowing what to expect. John's smile was the first to meet then greet me. It felt genuine and comfortable. He told me where I could speak to someone about information on the school and pointed me in the direction of the school office where Svea met me with another very warm smile. I sat down and within moments knew that this little place called "The Mountain School" was far greater than any school I had ever experienced. I started sharing my life and all that was going on with little Nova at school with a complete stranger that truthfully felt a lot more like a friend. :) I just knew that the fit was perfect! A bit later Svea showed me around the school and took me into the Kindergarten room. That was a defining moment for me, one that I will never forget. In fact I am so happy I am writing it down! I walked behind a soft curtain to find children playing and singing. The energy was as warm and safe as our own home. I then said hello to the teachers, Miss Beige and Miss Jessica. Miss Beige's presence was like a warm hug, in fact I can't help but hug her every time I see her, and the voice of Miss Jessica was like an angel lighting up the room. I was offered a seat at a table for the up coming snack, and couldn't help myself but to so graciously accept. "Could this really be?" I thought. "Is it real?" The smile on my face seemed eternal, as I watched the kids play and interact and the teachers go about setting up. I sat down and within a few moments the tears were streaming down my face. I was part of this grand experience, and I was forever changed. Miss Beige embraced me and I explained that they were tears of joy and so much relief, "happy tears".

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I left that day different. We are emotional beings and life is filled with emotional experiences. If I could speak to those who don't know about The Mountain School and the Waldorf Teaching Methods, I would tell them that they have not only changed my life but the little life of my child. All parents feel what their children feel and for me the stress, tension, and discomfort that were all too much were completely eliminated from our lives, even better we changed into these beautifully reincarnated versions of happier, healthier selves! We are only a few short weeks into attending but my little Nova girl wakes up singing again and is her love bug self, always smiling and sharing countless "I love you's" with her mama again. She is thrilled to go to school and feels safe and comfortable again. Which if you ask me is a very important element for learning and growth. When we walked home today and the first words from her mouth were "thank you so much mama for taking me to my new school!" "Everyone is nice, and I get to go hiking and feed the ponies!" "I sure am glad I don't have to go back to my old school!" My heart wanted to melt. It was so clear to me that her behavior was mirroring how she felt inside. She didn't know how to tell me but she was suffering through life and through school. It is safe to say that her learning experience was not a positive one and with her just beginning school, that was detrimental! I did not want my young child to carry such a belief about school and that is what TMS turned around for her.

What The Mountain School means to me and my family is a better, more authentic, wholistic (holistic) and wholesome life. A sweeter, more natural, smoother and stronger education for life! To see my daughters little light on again and her enthusiasm to learn means a very bright future for her! For her to learn a sacred respect for life, nature, self and others and to be inspired daily to learn, are only a few of the skills uniquely obtained through the teachings and teachers of TMS. These first years are molding her into the person she will become and how she views school and education is near the top of our (as parents) care and concerns.

I want to be clear that I am not prejudice against our public schools, because they do a lot of really great things for children and there are a lot of really great teachers giving of themselves. I am just telling our story. I believe that it is so wonderful to have an alternative option for our childrens schooling when public school isn't enough, or just doesn't fit. TMS really is a gem in our community! We are so blessed to be part of this special school family. A family that I hope and pray will continue to grow. I think it would be great if public schools could adopt and introduce some of the Waldorf teachings because I do whole heartedly believe that it would be incredibly progressive on so many levels to the children, our future. Change is needed and we found it in TMS! I look forward to many years of experiencing this very large blessing in our lives. Thank you. Thank you so much.

Thank you to each being of the staff at The Mountain school with all my heart, and Nova's too! :)

May we always listen to our hearts and follow them evermore.

And to many prayers that TMS becomes charter and spreads her wings!

August 15, 2013

Merry Christmas and a Happy New Year!

Jeremy, Maureen and Nova Silvis.

August 15, 2013

Dear Mountain School staff and donors,

Ben and I did not come to The Mountain School with the idea that our children would stay for Kindergarten and beyond. We were unfamiliar with Waldorf philosophy, or any educational philosophy for that matter. We thought that if public school was good enough for us, then it will be just fine for our children. What we did not realize was the way public education had changed since we were in school nor were we prepared for the amazing gifts our children and family would receive from a Waldorf education. Everyday we fall more in love with the Waldorf philosophy.

The Mountain School brings education alive for our two children. The kids truly enjoy learning and are allowed to do so at their own pace. The environment at The Mountain School enriches their whole person...body, mind and spirit. Our children are seen and treated as the individuals they are. For this reason, The Mountain School is the "right choice" for both our kids, even though their individual needs are quite distinct.

Our children are truly thriving at The Mountain School. This environment has helped them become well rounded individuals who are exposed to all aspects of life. It has nurtured creativity and problem solving skills that they will use to prosper in all life's endeavors.

We feel blessed to have stumbled into this Waldorf experience and are so very grateful for the talented, loving and devoted staff at The Mountain School.

Thank you for this amazing caring, creative, inspiring school!

Date: January 10, 2013

To: The Mountain School

Dear Kate and Mountain School Teachers,

This wonderful holiday season is coming to a close and we find ourselves at another beginning point, our new year. Matt and I have been doing a bit of reflecting lately and we both wanted to share with you what The Mountain School means to us and to Camas.

When we think back to what brought us to The Mountain School we reflect on some of the struggles Camas was having with the public school system, realizing there had to be a different approach to education, one that was more suited to Camas. After talking with you on that summer day and learning more about the Waldorf educational methods we knew this education would speak to Camas, nurturing her development through childhood and allowing her to be successful as a student.

There are many things we cherish about The Mountain School and the Waldorf education system. Below are just a few examples of why we are so happy with our choice of having Camas at The Mountain School:

August 15, 2013

When we took Camas to public school during her first grade year she was hesitant to go to her desk, as she was immediately asked to be attentive and focused on a sitting and thinking task. Now, at The Mountain School, Camas is allowed time to warm up into her day of learning with movement, rhyming, singing, and other classroom activities that encourage her to learn through experiences, prior to engaging in the day's main lesson. We love the emphasis on outdoor learning and lessons in nature and on the farm.

These daily connections to nature allow Camas time to explore the world around her, learn about plants, animals and wilderness skills, and develop a respect for all creatures she may encounter. These explorations allow her natural curiosities to grow and for Camas to be involved with her environment, as all children should be.

We feel a strong sense of belonging and community at The Mountain School. The children are taught to be sensitive of others, inclusive in their play, and to work differences out with each other. This leads to respectful and strong relationships being formed and the kids learn to depend on and praise each other in their successes.

Watching the school kids play together when away from The Mountain School environment gives us incredible insight to what is being fostered. We see creative, imaginative play where no one is left out and there are rarely emotional outbursts.

So we would like to take this time to say Thank-you. You've created an educational space that is calming and supportive, instills a love for learning, and captures our daughter's curiosity. You encourage her explorations and teach her self-responsibility and have given her a community that embraces her spirit. We cannot imagine a better place for her to be.

Sincerely,

Ma! and Bobbi Filbert"

(Parents of Camas Filbert, 3rd grader)

January 2013

Dear TMS Staff, Board of Directors, and Founders:

I want to take a few moments to express my deep gratitude for TMS.

The Mountain School and Waldorf inspired education has become a very important part of our family life. Our daughter, Cora has been blessed in her early education starting in playgroup Winter/Spring 2010, preschool 2010-2011, younger kinder 2011-2012, and now older kinder 2012-2013. The love and knowledge of the staff and TMS community are cherished. There is no other place I would want Cora to be during this very important and sacred time in her learning- about herself and her relationship to others in the world.

On the first day of Kindergarten (officially- this year), I drove away with tears of gratitude. I could feel my heart swell with love for the school and all the families in it. Though I may have been feeling the grief and joy of my daughter marking a major milestone, I had no worries or cares about her wellbeing. I don't know if you realize what a wonderful gift that is. Thank you for giving that to TMS families and me.

August 15, 2013

And there is more- I also drove away knowing my husband, Travis Scott, was starting his first year of teaching in his own classroom. An incredibly gifted and intelligent man who is so inspired and excited to offer Waldorf education to the children of TMS. He was nervous and excited and even forgot his lunch (which I brought back to him later that morning) AND he is so deeply committed and only becomes more committed through his learning and time at TMS.

Thank you for giving our family this opportunity to grow and learn through reverence and love. Thank you for helping us reconnect to mother earth, to the land of magic and mystery- so that we may understand more about kindness, caring, and confidence. Thank you for helping us heal our own educational experience and misunderstandings about ourselves and learning- and most of all, thank you for giving Cora the chance to blossom through love, exploration, guidance, and grace.

Many Blessings,

Carrie Thomas Scott, MA, LCPC

Mother of Cora Faye Scott, OK (5 years old)

Wife of Travis Scott, 1st Grade Teacher

PA Co-Chair 2012-2013

Dear EVERYONE at the Mountain School,

On behalf of our children, Simran and Leila (and Jaxon!), we wanted to say thank you. The Mountain School experience has been a huge part of our lives. The challenge of raising kids this day and age is massive. There are so many question marks along the way that it is really hard not to be overwhelmed. There are so many things out there competing for our kid's attention; it is hard to know how to juggle it all. The Mountain School has been an amazing place for our children to experience the world. We, as parents, are so thankful for our kids to have the chance to be surrounded by such a supportive and wonder inspiring environment. They come home from school each day glowing with happiness. From our perspective, this is foundation we want for our children. We love the idea that our kids are cultivating their curiosity through the natural world, through the arts, through song, and through the incredible passion of the teachers at TMS. We also think it is also really important to acknowledge that our children are not the only ones benefiting by the TMS experience. The Mountain School has really helped us be better parents. It is certainly not the type of school where you simply drop off your children, pick them up later, and leave the school day behind. We are inspired to bring the magic of TMS back into our home and into our family. It is a very difficult thing to express how important this experience has been for our family, and how grateful we are to have our children be a part of the school. All we can say is Thank You with all our hearts. It has been an incredible journey thus far and we are super excited to have it continue long into the future!

Sincerely,

Sirimukh, Scotty, Simran, Leila, and Jaxon McGrew

August 15, 2013

Dear Kate and the entire Woods family

I wanted to write and let you know how truly blessed we are to have Waldorf in the Pilaro family for the past four years and especially this past fall as we went on the road for my healing adventure.

Leaving the Mountain School was hard for all of us as it has become a staple in our lives. It is our community. It is our teacher, coach, counselor, friend and more. We knew we would be back we just didn't know when and this uncertainty made us all a little uneasy.

But off we went because we had to. Very soon after arriving in phoenix it became clear that with the education and confidence instilled in both Logan and Zeppelin they approached the challenge as an opportunity and welcomed the change with open arms and open hearts.

Their education was seamless and it is a testament to Waldorf education and we are so happy to be back and to have the Mountain School here in the Wood River valley so as a family we can all continue to learn and grow together.

Much peace and love in 2013.

The entire Pilaro family.

Short & Sweet from my iPhone

For Bobbi Filbert and the Parent Association.

To Kate, the teachers, TMS Board of Directors and all the very special beings that make The Mountain School - here is our little story of our grand experience.

After months of worrying about my sweet little Nova, a recently turned five year old, change came to us or maybe we came to it :). Not quite sure which one. Nova had starting off on her own into this big world attending public school, and as her mama I could see the amount of discomfort she was in. My little girl became sad, angry and all together unhappy. I was having a hard time understanding the change in Novas attitude toward not only myself but most others. She was complaining daily and she was lacking the words to express what she was going through which not only frustrated her but me also. My husband and I are both working parents and so when I say we continued to push through the struggles I think it can be understood by most parents. Nova is our only child and life changes are always continual. I tried loving her more thinking that she would come around but deep inside I was hurting more than I was even consciously aware of. After a few recent and consecutive negative happenings at school I was at my end. I wasn't sure what would happen but I knew that we both needed a change because "school" was becoming a very negative part of our everyday.

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I left that day different. We are emotional beings and life is filled with emotional experiences. If I could speak to those who don't know about The Mountain School and the Waldorf Teaching Methods, I would tell them that they have not only changed my life but the little life of my child. All parents feel what their children feel and for me the stress, tension, and discomfort that were all too much were completely eliminated from our lives, even better we changed into these beautifully reincarnated versions of happier, healthier selves! We are only a few short weeks into attending but my little Nova girl wakes up singing again and is her love bug self, always smiling and sharing countless "I love you's" with her mama again. She is thrilled to go to school and feels safe and comfortable again. Which if you ask me is a very important element for learning and growth. When we walked home today and the first words from her mouth were "thank you so much mama for taking me to my new school!" "Everyone is nice, and I get to go hiking and feed the ponies!" "I sure am glad I don't have to go back to my old school!" My heart wanted to melt. It was so clear to me that her behavior was mirroring how she felt inside. She didn't know how to tell me but she was suffering through life and through school. It is safe to say that her learning experience was not a positive one and with her just beginning school, that was detrimental! I did not want my young child to carry such a belief about school and that is what TMS turned around for her.

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Thank you to each being of the staff at The Mountain school with all my heart, and Nova's too! :)

May we always listen to our hearts and follow them evermore.

And to many prayers that TMS becomes charter and spreads her wings!

Merry Christmas and a Happy New Year!

Jeremy, Maureen and Nova Silvis.

A holiday letter of gratitude:

Dear TMS Board & The Woods' Family,

We have so much gratitude towards this little school and all that Kate, John, the Woods' Family and the teachers over the years have put into creating this beautiful life experience for our children. Once we saw our youngest child thriving in her Kindergarten class and we began learning more about this completely new (to us) teaching method & methodology, we knew our then 1st grader needed to share in the experience. Four and ½ years later, we feel so thankful that our children have been able to spend some of their most formative years here.

Both of our girls have gained such a sense of care & empathy for others, joy of learning, tolerance, confidence, artistic expression and respect for the earth, themselves & those around them. Their academic skills are strong and resonate deeply within. I feel like these building blocks gained through TMS will remain with them for a lifetime – not just be facts they are able to recall for a test and then forget.

Our family stumbled upon the Mountain School through a colorful ad in the paper describing a magical sounding type of playgroup for my children. Like most at our school, we had no idea what Waldorf was

August 15, 2013

and had no plans of our children attending a private school. But, we were drawn in by the wholesomeness of baking bread, sewing placemats, the singing transitions, the molding of beeswax, the warmth of Kate and the peaceful atmosphere she created, the animals on the farm and the beautiful garden used to feed the school. The school has formed not only our children, but continues to educate us as parents as well. It has showed us a different path with deeper meaning, and still we have so much to learn! The more we continue learn, the more we value the academic breadth, social learning and sustainability this school represents and the more we understand the importance of this type of school in our community.

We thank you deeply for bringing this amazing experience into our lives.

Warmly,

Svea & Chris Grover

Dear TMS Staff and Donors:

We chose The Mountain School initially for its preschool program without knowing much about Waldorf education or The Mountain School in general. What we did know and based our decision on then was that there was a school on a farm with a beautiful garden, a variety of animals, a warm, soothing indoor environment and nurturing teachers all of which would contribute to the growth, creativity, imagination & wonder of our child. As our journey began, we realized there was so much more than meets the eye. TMS is a school where children can be just that, children, accepted for their individualism as a whole where they are allowed to move & play in a manner that feeds their imagination. Children are allowed to freely explore & learn with their eyes, ears, hands, nose, mouth & heart in a place where they feel safe, loved and heard all while learning, which in this way, is just play to them. There is singing & light & laughter. Learning in this way nurtures the children's natural patterns of growth and through experience, their lessons are embedded and become a part of them creating an incredibly strong foundation & love for learning which is an invaluable tool for life. We have seen first hand the value of learning through this philosophy & in this environment and what is awakened in not only the children but the parents as well. As we have become educated more and more as parents about a Waldorf inspired education, we have realized that not only are our children benefiting but we as parents are as well. We are all a piece to the intricate woven web of this, TMS family. Walking onto the farm you instantly feel a warm sense of community, of family, of like minded families who are giving their children an incredible educational opportunity and allowing them to be surrounded by friends, families & teachers who love them, who know them heart and soul and will be there to nourish & help them spread their wings as they begin their own journey. What more could you ask for? Thank you Kate for creating the path, thank you TMS Board for nurturing the path, thank you teachers for planting the seeds of learning that will continue to grow in our children with the help of this amazing community, this family of families.

With heartfelt sincerity,

Ginger & Tom Ferries

August 15, 2013

August 1, 2013

Dear Mary,

I very much enjoyed meeting you on Tuesday morning. I applaud you for your efforts at bringing the Syringa Mountain School into the charter school community of Idaho. The accessibility provided in becoming a charter school to your current and future student base is such a benefit to the Wood River Valley.

Options in education are critical and your work will contribute to the educational opportunities that residents will be able to afford. Charter schools provide such cost effective alternatives to the traditional main stream educational institutions.

I know from my experience of transitioning an independent school to charter school status that you have the interest of the children as your number one priority. I commend you for that. I want you to know I will support you in your efforts to the best of my ability.

Good luck with your application process and hearing. Feel free to call on me should you need advice on anything.

Sincerely,
Rob Clayton
Executive Director
Sun Valley Ski Education Foundation

Subject: Syringa Mountain School
From: Kate McClure (kate@13d.com)
To: marymgervase@yahoo.com;
Date: Thursday, August 1, 2013 12:14 PM

Mary

Kiril and I are so enthusiastic about the new Waldorf school. Natasha raved about the camp and I adored my brief time there. What a magical environment!!! I know it will change many young lives and make our community a better place.

Kiril and I are two of your biggest fans and supporters. We always have been and will continue to be. We would very much like to pledge our financial support to the school and get involved in ongoing funding for teacher education. When you and I sit down in next few weeks we can examine some numbers and firm up our commitment for the next years.

I would of course love to host a luncheon or dinner to raise awareness of the school's mission and encourage others with deep pockets to get involved. Perhaps if not this summer then surely over the holidays. As we discussed I will also reach out to Lori Otter to convey our enthusiasm and support.

Sending best wishes,

Kiril and Kate Sokoloff

Sent from my iPhone

August 15, 2013



May 20, 2013

Dear Gardening Friend & Educator:

Congratulations! Your organization was selected as one of 20 award winners from a pool of more than **650** inspiring applicants for the Voots® "Get Kids Growing" Garden Grants administered by the National Gardening Association and funded by Voots® Veggie-Fruit Tarts.

Your school was selected because your application illustrated a combination of clearly stated goals, organized planning for your garden, well-developed plans for incorporating health and nutrition into the curriculum, and an interest in composting. We are delighted to have this opportunity to support your garden education program.

As an award winner, you are receiving \$700 in garden supplies and a check for \$50 towards the purchase of soil amendments and plantings. *Checks and signs will arrive together, while the raised bed, grow light, curriculum, and tools will arrive separately. Please be patient in receiving these items, they are shipping from our warehouse in Northern Vermont.*

National Gardening Association appreciates the support Voots® Veggie-Fruit Tarts provides for youth garden programming. We would encourage your students to share their gratitude. Please pass along any thank-you notes to the address listed below and we will make sure to get them to Voots® Veggie-Fruit Tarts, our sponsor for these grants.

Mail: Voots® "Get Kids Growing" Garden Grants 2013
National Gardening Association
237 Commerce Dr.
Suite 101
Williston, VT 05495

Please note that by accepting this award we will require a follow-up report from you. All winners are asked to complete the following requirements:

- A post-gardening survey emailed to all primary contacts at the end of the summer
- 5-10 digital photos with parental release forms (forms are available at <http://www.kidsgardening.org/grants-and-awards>)
- A one-page summary documenting the garden's progress

We look forward to hearing from you and learning more about your program. If you require assistance or have any questions, please feel free to contact juliad@garden.org.

Happy Gardening,

NGA Grant Committee



August 15, 2013

Idaho Public Charter School Commission
Boise, ID

Re: Syringa Mountain School Charter Application

To Whom It May Concern:

It is my pleasure to support the charter school petition of Syringa Mountain School. Although I was recently elected to the Blaine County School Board, today I am writing to you as a parent of three school age children.

I believe the Syringa Mountain School's innovative educational approach will greatly benefit our community by providing a well rounded, research based, unique educational choice for families. I have great confidence this school will be a positive contribution to our community with Dr. Mary Gervase, previous Assistant Superintendent of Blaine County Schools, as the school administrator.

In conclusion, I fully support Syringa Mountain School and urge you to approve their charter school petition.

Sincerely,

Kathy Baker
Hailey, ID

August 15, 2013

From: [Wendy Jaquet](#)
To: [Tamara Baysinger](#)
Cc: [Mary Gervase](#)
Subject: charter school application
Date: Friday, July 05, 2013 4:31:28 PM

Hi Tamara,

I have been asked to write a letter of recommendation for the Syringa Mountain School charter application that you will be reviewing at your August 15 meeting.

I support the application, but wanted to comment on a few concerns that have been brought to my attention:

1. The parental support from the previous school has been exemplary. A friend of my son's said he has been helped in parenting - since he experienced very poor parenting, this is very impressive.
2. The Waldorf model is a practice that is different that what is taught at the Blaine County Schools and is therefore, in my mind, relevant to the true spirit of the charter school movement - incubators for different practices. This was why I voted for the charter school legislation in the beginning and did not support in subsequent years because it seemed like we were creating parallel tracks and diminishing financial support for the traditional public schools and not following the incubator model.
3. The Waldorf model apparently does not teach early reading readiness and hence children go through the model in a sequential fashion and learn reading/etc as they get closer to the 8th grade or perhaps earlier. My concern is that the school is starting out with just the lower grades, but I believe they intend to add grades as the school progresses.
4. In going door to door in 2008 I was pleased to talk to so many parents in the Hailey Bellevue communities who were sending their children to the Mountain school, a predecessor to this application. I also met several outstanding teachers. This affirms my belief that this choice will be well received in the community.
5. The charter should take some pressure off the building program that has been undertaken by the traditional school. The property taxpayers in the community will be grateful. The percentage of the tax bill in Blaine which goes to schools is high and especially high for the non resident owners who have high values.

Thank you for the opportunity to comment.

Wendy Jaquet