IDAHO PUBLIC CHARTER SCHOOL COMMISSION
304 North 8th Street, Room 242 • P.O. Box 83720 • Boise, ID 83720
208-332-1561 • Fax: 208-334-2632
e-mail:pcsc@osbe.idaho.gov

PUBLIC CHARTER SCHOOL COMMISSION
REGULAR MEETING

February 13, 2020, 9:00 am
650 W State Street
Len B Jordan Building, 3rd Floor Clearwaters Conference Room
Phone: 1-877-820-7831
Guest Passcode: 777894

AGENDA

Thursday, February 13th, 2020

A. COMMISSION WORK

1. Agenda Review / Approval (Action Item)
2. Minutes Review / Approval (Action Item)

B. PUBLIC COMMENT

Public comment will be limited to three minutes per person. If you wish to provide public comment, or if auxiliary aids or services are needed for individuals with disabilities, please contact the PCSC office at (208) 332-1561 at least 24 hours in advance of the meeting, or sign in at the meeting location before the meeting opens.

Written comment may be submitted to the PCSC during the meeting, via mail at P.O. Box 83720, Boise, Idaho, 83720, or electronically at mailto:pcsc@osbe.idaho.gov.

C. CONSIDERATION OF TRANSFER PETITION

1. Anser Charter School (Action Item)

D. CONSIDERATION OF PERFORMANCE CERTIFICATE ADOPTION

1. Doral Academy of Idaho (Action Item)
2. Pinecrest Academy of Idaho (Action Item)

E. CONSIDERATION OF PERFORMANCE CERTIFICATE AMENDMENT

1. Elevate Academy (Action Item)

F. CONSIDERATION OF PERFORMANCE CERTIFICATE NEGOTIATION

1. Heritage Academy (Action Item)

G. PCSC DIRECTOR'S REPORT

The director will provide a brief update of management actions for informational purposes.

H. RENEWAL COMMITTEE UPDATE

Commissioner Quinn, chair of the Renewal Committee, will provide an update on committee progress for informational purposes.

I. PCSC DISCUSSION

1. Consideration of location for 2020 regular meetings. (Action Item)
2. Legislative update. (Action Item)
3. PCSC policy review. (Action Item)

1. Agenda Approval

   Does the Public Charter School Commission (PCSC) have any changes or additions to the agenda?

   COMMISSION ACTION

   A motion to approve the agenda as submitted.

2. Minutes Approval

   Does the PCSC have any changes or additions to the meeting minutes from December 12-13, 2019?

   COMMISSION ACTION

   A motion to approve the meeting minutes from December 12-13, 2019, as submitted.

DRAFT MEETING MINUTES
IDAHO PUBLIC CHARTER SCHOOL COMMISSION

December 12-13, 2019
700 W. Jefferson Street, Boise, Idaho
Idaho State Capitol Building, East Wing 41

The meeting was called to order by Chairman Reed at 9:07 a.m. The following Commissioners were in attendance:

Alan Reed
Brian Scigliano
Wanda Quinn
Nils Peterson
Kitty Kunz
Sherrilynn Bair
Julie VanOrden

TAB A: COMMISSION WORK

1. **Agenda Review/Approval**

   M/S (Kunz/Bair) To approve the agenda as presented. *The motion passed unanimously*.

2. **Minutes Review/Approval**

   M/S (Scigliano/Peterson) To approve the minutes as presented. *The motion passed unanimously.*

TAB B: PUBLIC COMMENT

Susan Lux, Principal, PIE-Nampa spoke in support of the Pathways in Education – Idaho Falls new charter petition. Susan believes that there is need for this type of school in Idaho Falls and stated that PIE-Nampa has been successful reaching at-risk and alternative students.

Riley Bell, student PIE-Nampa spoke in support of the Pathways in Education – Idaho Falls new charter petition from the perspective of a student. She stated PIE-Nampa allowed her to work toward a high school diploma instead of a GED.

Ed Klopfenstein, Chairman, Board of Trustees West Ada School District, spoke in opposition to the Doral Academy of Idaho new charter petition. The school district has

concerns about Academica and adding another arts-based school to a district with existing arts-based schools.

TAB C: CONSIDERATION OF NEW CHARTER PETITIONS

1. **Doral Academy of Idaho (DAI):** Board Chair, Jade Millington introduced the board directors and presented the new charter petition which will be located in the West Ada School District. He explained the arts integration model. The school will serve grades K-8.

   The school plans to lease the church currently occupied by Compass Charter School. Compass intends to move to a new campus.

   Doral will partner with an education service provider, Academica. The school will also partner with Doral Academy for additional services.

   Commissioners asked for clarification about the management fees charged by Academica and the services they provide.

   Commissioner Peterson asked if PCSC staff would be able to provide governance orientation and training with the reduced staff in the office. Director Baysinger stated that the trainings are already developed and the staffing shortage would not impact the training.

   M/S (Quinn/Van Orden) A motion to approve the new charter petition for Doral Academy Idaho with the following conditions:

   - All board directors shall participate in a staff-facilitated governance orientation within 60 days of approval and no less than six hours of staff approved governance training addressing the governance role in financial, operational, academic oversight, and legal compliance prior to May 11, 2020.

   - The governing board shall present the executed facility lease and/or purchase agreement, record of any long-term debt incurred to date, and a year-one operational budget based on post-lottery enrollment estimates that evidences financial sustainability by May 11, 2020.

   The motion passed 4-2 with Commissioners Peterson and Scigliano opposing the motion.

   Roll Call: Commissioner Scigliano: Nay, Commissioner Quinn: Aye, Commissioner Peterson: Nay, Commissioner Kunz: Aye, Commissioner Bair: Aye, Commissioner Van Orden: Aye.

2. **Pathways in Education – Idaho Falls (PIE-IF):** Board members Monica Bitrick and Katie Rhodenbaugh presented the new charter petition. Jessica James and Hailey Mack attended by phone. Ms. Bitrick pointed out changes that had been made to the petition on the recommendation of PCSC staff after the final petition was submitted.

   Monica shared the need for this type of school in east Idaho. She also pointed out that there is currently a PIE-Nampa that has been successful with at-risk students. This model is a traditional school for at-risk youth. They plan to partner with Idaho Falls School District to identify youth that have dropped out of school or are on the path to drop out of school.

   Commissioner Kunz asked about transportation from Fort Hall. Board member Jessica James explained that there is Tribal Transit available to students if needed.

   Discussion followed about the management fees and management services to be provided by Pathways Management Group.

   M/S (Peterson/Bair) A motion to deny the petition for a new charter school for Pathways in Education – Idaho Falls. *After further discussion the motion passed 6-1 with Commission Kunz opposing the motion.*

   Roll Call: Commissioner Scigliano: Aye, Commissioner Quinn: Aye, Commissioner Peterson: Aye, Commissioner Kunz: Nay, Commissioner Bair: Aye, Commissioner Van Orden: Aye.

   Director Baysinger explained the appeal process and the option of bringing forth a new petition at a later date.

TAB D: CONSIDERATION OF TRANSFER PETITIONS

1. **Thomas Jefferson Charter School:** Jodi Endicott, Principal introduced the board directors for TJCS.

   Jodi Endicott explained the school's mission and attendance requirements. She stated that the students consistently score above average on all state testing. The school uses the Harbor Method.

   Ms. Endicott stated that enrollment is between 374 to 400 and that the school owns its facility along with an adjacent parcel of land. The school operates debt-free and has enough cash on hand for four months of emergency operations. Transportation is provided by Brown Bus Company.

M/S (Bair/Peterson) A motion to approve the charter transfer petition for Thomas Jefferson Charter School. Commissioner Kunz recused herself. *The motion passed unanimously.*

2. **Hayden Canyon Charter School:** Commission Peterson disclosed that he provided help with the original petition in 2010 or 2011. Josh Fletcher, Vice President of Hayden Canyon Charter School (HCCS) introduced the board directors. Mr. Fletcher mentioned the architect and Red Apple Financial Group were also present.

   Cynthia Lamb, Administrator explained their Expeditionary Learning (EL) model. She stated that the school's focus will be on state standards, character development, and academic performance. Petitioners also discussed the school's delayed opening under Lakeland School District's authorization and the school's financial and facilities plans.

   Commissioner Peterson asked about professional development. Ms. Lamb described their plan for EL instruction and training.

   M/S (Peterson/Kunz) A motion to approve the charter transfer petition for Hayden Canyon Charter School. *The motion passed unanimously.*

TAB E: OTHER

1. **Renewal Committee Update:** Director Baysinger provided an update of the Renewal Committee's December 11th, 2019 meeting. The Renewal Committee had been asked to look into additional academic framework flexibilities within the performance framework.

   66% of PCSC portfolio schools responded to a stakeholder survey. The Renewal Committee hosted a discussion with stakeholders on December 11th to clarify the issues. In January and February, additional committee meetings will be held to gather more information and hear proposed solutions. The Renewal Committee will make a recommendation to the PCSC at its regular April meeting.

2. **Commission Discussion: Invitation to Participate in A-GAME Network:** Program Manager, Jenn Thompson explained the purpose of A-GAME. This is sponsored by the National Charter School Institute. It's a three year project with the primary goal of improving charter authorizing of schools with at-risk factors.

   We have been asked to participate in regional meetings to discuss challenges and successes in authorizing schools with at-risk youth.

The commitment would require three two-day meetings and working with PCSC portfolio schools who serve at-risk students to identify local solutions.

Commissioner Kunz stated that she would prefer that the participating staff member is a Program Manager rather than the Director.

M/S (Bair/Van Orden) A motion to approve participation in the A-GAME Project. *The motion passed unanimously.*

Commissioners Quinn and Van Order thanked Director Baysinger for her time with the commission.

M/S (Scigliano/Peterson) A motion to adjourn for the day. The meeting adjourned at 12:30 p.m. *The motion passed unanimously.*

The meeting was reconvened by Chairman Reed at 9:00 a.m., Friday, December 13, 2019. The following Commissioners were in attendance:

Alan Reed
Brian Scigliano
Wanda Quinn (By phone until 10:45 am)
Nils Peterson
Kitty Kunz
Sherrilynn Bair
Julie VanOrden (Absent)

TAB F: CONSIDERATION OF PERFORMANCE CERTIFICATION

1. **Gem Prep: Meridian North:** Director Baysinger summarized the performance certificate to be executed.

   M/S (Scigliano/Kunz) A motion to execute the performance certificate for Gem Prep: Meridian North as presented. *The motion passed unanimously.*

TAB G: IDAHO TECHNICAL CAREER ACADEMY UPDATE: CAREER TECHNICAL PROGRAMS

1. **ITCA Update on Career Technical Programs:** Monti Pittman, Head of School presented information concerning the school's programs and the impact of mobility on student achievement and testing scores. A binder was shared with the commissioners and staff highlighting their programs. ITCA's mobility rate for 2017-2018 was 67%.

   Mr. Pittman presented the demographics of their students and noted the percentage that were credit deficient.

Mr. Pittman also spoke about the career path programs offered by the school and highlighted the student scores in these programs, which exceed the state averages. He shared that the school's success is measured in other ways rather than testing scores.

This agenda item was informational only; no action was taken.

TAB H: CONSIDERATION OF NEW CHARTER PETITION

1. **Pinecrest Academy of Idaho:** Board Chair, Connie Stopher introduced the other board directors and presented the Pinecrest STEAM model. The school intends to serve grades K-8 in the Twin Falls area.

   The school's vision is to prepare students for college and to perform at their highest level possible. The school proposes to lease space from the Reformed Church in Twin Falls.

   Commissioners asked petitioners to explain the education services provided by Academica. Kyle McOmber from Academica answered questions concerning the fees charged for their services.

   M/S (Kunz) A motion to approve the new charter petition for Pinecrest Academy of Idaho. *There was no second and the motion failed.*

   The Commission discussed Academica and directed questions concerning fees and financial information to John Barlow, also a representative from Academica.

   M/S (Peterson/Scigliano) A motion to approve the new charter petition for Pinecrest Academy of Idaho with the following conditions:

   - All board directors shall participate in a staff facilitated governance orientation within 60 days of approval and no less than six hours of staff approved governance training addressing the governance role in financial, operational, academic oversight, and legal compliance prior to May 11, 2020.

   - The governing board shall present the executed facility lease and/or purchase agreement, record of any long-term debt incurred to date, and a year-one operational budget based on post-lottery enrollment estimates that evidences financial sustainability by May 11, 2020.

   The motion passed unanimously.

TAB I: COMMISSION EDUCATION

1. **Commission Education: Guidelines for School Visitation:** Director Baysinger spoke about school visits as part of commission meetings and recommended that the commission delay planned visits until the staff was back at full capacity. However, visiting schools during events already intended for the public would not be problematic. Director Baysinger introduced Rachel Newton, Deputy Attorney General.

   Ms. Newton presented information on school visits and open meeting laws and stressed the importance of communication with staff and disclosure of any information that may inform a commissioner's vote.

2. **National Summit on Education Reform Report:** Commissioners Bair and Scigliano attended the recent conference and shared their experience.

   M/S: (Peterson/Scigliano) A motion to adjourn. *The motion passed unanimously.*

   The meeting was adjourned at 11:43 a.m.

Public Comment

Public comment will be limited to three minutes per person. If you wish to provide public comment, or if auxiliary aids or services are needed for individuals with disabilities, please contact the PCSC office at (208) 332-1561 at least 24 hours in advance of the meeting, or sign in at the meeting location before the meeting opens.

Written comment may be submitted to the PCSC during the meeting, via mail at P.O. Box 83720, Boise, Idaho, 83720, or electronically at pcsc@osbe.idaho.gov.

SUBJECT

Anser Charter School Transfer Charter Petition

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5205A Public Charter Schools
IDAPA 08.02.04 Rules Governing Public Charter Schools

BACKGROUND

Anser of Idaho, Inc. (dba Anser Charter School) is petitioning to transfer the authorization of its charter from Boise Independent School District to the PCSC.

Anser was founded in 1998 and has been serving grades K-8 for over 20 years. The school implements an Expeditionary Learning instructional model, and has a history of high academic performance.

DISCUSSION

Materials related to this agenda item include a Petition Evaluation Report, prepared by PCSC staff, a transfer petition prepared by Anser Charter School, and a proposed performance certificate.

The Boise Independent School District and Anser Charter School's board of directors have both approved this transfer proposal, including all associated charter and performance certificate amendments.

IMPACT

If the PCSC approves the transfer petition and the proposed performance certificate, the transfer will be effective July 1, 2020. Immediate effectiveness is not possible due to funding streams that cannot be impacted mid-year.

If the PCSC denies the petition, the petitioners could appeal to the State Board of Education, or they could decide to not proceed further.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC approve the transfer charter petition for Anser Charter School and execute the performance certificate as presented in these materials, effective July 1, 2020.

COMMISSION ACTION

A motion to approve the transfer charter petition for Anser Charter School and execute the performance certificate as presented in these materials, effective July 1, 2020.

OR

A motion to deny the Anser Charter School transfer petition on the following grounds:_____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

PETITION EVALUATION REPORT & STANDARDS OF QUALITY

Idaho Public Charter School Commission
304 North 8th Street, Room 242
Boise, Idaho 83702

Phone: (208) 332-1561
chartercommission.idaho.gov

Alan Reed, Chairman
Jenn Thompson, Interim Director

Updated 7/22/19

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PETITION EVALUATION REPORT

Anser Charter School

Petition Review Summary

Summary

Anser Charter School has served students in the Boise area for 20 years. The school is successful academically and operationally. Anser serves as a mentor school within the national network of Expeditionary Learning Schools and has a strong retention rate for students, employees, and board directors.

Anser is currently authorized by the Boise School District. The board is seeking to transfer authorization to the PCSC, effective July 1, 2020. Anser intends to expand from approximately 350 students to 672 students, continuing to serve grades K-8.

The school has a strong facility plan and is financially in good standing.

In addition to an evaluation of the petition, this report also includes:

- The Governance Capacity Interview Summary

Staff recommends that the PCSC approve the transfer charter petition for Anser Charter School and execute the performance certificate as presented in these materials, effective July 1, 2020.

Summary of Section Ratings

Section 1: Educational Program ⇓	Section 2: Financial & Facilities Plan ⇓
EXCEEDS STANDARD	MEETS STANDARD
Section 3: Board Capacity and Governance Structure ⇓	Section 4: Student Demand & Primary Attendance Area ⇓
MEETS STANDARD	MEETS STANDARD
Section 5: School Leadership and Management ⇓	Section 6: Virtual Schools ⇓
MEETS STANDARD	NOT APPLICABLE

Section I: Educational Program

EXCEEDS STANDARD

READ MORE: Standards of Quality

Comments

Anser presents a strong academic plan reflective of years of refining their EL model. Embedded in the academic model is a strong commitment to student leadership and public service.

Detail

Strengths:

- Anser maintains AdvancEd accreditation status.
- Anser is an EL credentialed school, which requires an accreditation process specific to EL Schools. Credentials are based on exemplary implementation of the EL Core Principles, which is included as Appendix F5.
- Anser's academic proficiency and growth in Math and ELA are above both those of their local district and the state.

Concerns:

- No concerns

Section II: Financial and Facilities Plan

MEETS STANDARD

READ MORE: Standards of Quality

Comments

Anser intends to maintain its current location, accommodating additional students through remodeling and expansion into a second, adjacent facility. Anser has $2 million in equity in the current facility and has already purchased the second facility with cash in anticipation of the expansion.

A project quote from Building Hope is included. It is anticipated that when the project is complete, the school's total annual facility cost will remain under 12% of the school's annual revenue. Charter school facilities are commonly closer to 20%.

Detail

Strengths:

- The school's Organization Director is a long time employee.
- The school is currently in good financial standing.
- BLUUM has assisted with preparing the expansion budget plan.
- Building Hope appears to be partnering on this project. See Appendix F9.

Concerns:

- No concerns

Section III: Board Capacity and Governance Structure

MEETS STANDARD

READ MORE: Standards of Quality

Comments

Anser's board consists of 12 directors. The co-directors of the school give regular reports to the board as does the parent organization. The school community is engaged in the successful operations of the school.

Please see the Governance Capacity Interview Summary for more information.

Detail

Strengths:

- The board includes directors experienced in charter school governance and with Anser specifically.

Concerns:

- No concerns

Section IV: Student Demand and Primary Attendance Area

MEETS STANDARD

READ MORE: Standards of Quality

Comments

Anser currently serves approximately 350 students. The school intends to begin a slow growth plan by which the size of the school would increase to 672 students over six years.

If the PCSC approves the transfer application, the school's proposed growth would increase the yield rate of the Boise district slightly next year. However, the total yield would remain within state and national averages. See the chart below.

Charter School Yield Rate* for Boise School District	% Yield
Most Recent Year Yield (2018-2019)	9.41%
Anticipated Yield 2020-21	9.5%
Potential Yield Rate (if all operating charters enrolled to capacity)	13.23%
Idaho Average	11%
National Average	10-15%

*Yield rate is the percentage of students served by public schools located in a district's boundaries who choose to attend a charter school.

Detail

Strengths:

- The school reports a lottery of 400 students for 40 open seats last year. They regularly have large waitlists.
- The proposed expansion would allow the school opportunity to recruit underserved populations and promote a demographic that more authentically reflects the Boise district and the neighborhood in which the school is located. Please see the Student Demand and Primary Attendance Area section of the petition (page 35).

Concerns:

- No concerns

Section V: School Leadership and Management

MEETS STANDARD

READ MORE: Standards of Quality

Comments

Anser implements a co-director model of leadership. The Education Director manages academic performance, instruction, assessment, and teacher coaching. The Organization Director manages finances, HR, vendor management, and relationships with the various stakeholders. This leadership structure has been successful at the school since 2004.

In preparation for a gradual expansion, the school is phasing in several new positions, including a relations and engagement position, which was filled for the 2019-20 school year.

Detail

Strengths:

- The leadership team is experienced and has been with the school for many years.

Concerns:

- No concerns

Idaho Public Charter School Commission
Transfer Petition
Governance Capacity

Petitioning School	Anser Charter School
Date of Interviews	
PCSC Staff who Conducted Interview	Tamara Baysinger, PCSC Director
	Jenn Thompson, Program Manager
Board Members Interviewed	Nichoel Baird Spencer, President
	Caitlyn Scales, Vice President
	Maridee Lemieux, Treasurer
	Lora Breen
	Leslie Brown
	Staci Shaw (joined virtually)
	AnnMarie Johnson
	Maggie Chase
	Jeff Tonkin
	Kristin Reed
	Amy York

PCSC staff interviewed the Anser Charter School board of directors on December 10, 2019. This governing board has been operational for 20 years, and several board directors have served as directors for more than one consecutive term.

During the interview, PCSC Staff and Anser Board Directors discussed the nature of the relationship between authorizers and charter schools. We discussed the school's academic performance and its successes and challenges.

Directors are well-informed about the performance of their school and have a strong understanding of the separation of governance and management work. The relationship between the board and the school's administration is supportive and collaborative. The board utilizes a committee structure to ensure they are sufficiently informed, and regularly engages in self-reflection exercises and board training. This is an exemplary board.

Strengths of the board:

- The board is experienced in charter school governance
- The board effectively utilizes a committee structure

Areas of Concern:

- PCSC staff expresses no significant concerns.

STANDARDS OF QUALITY

Introduction Checklist

1. Formatting

☒ All pages are legible in the final PDF (i.e. font size, quality of copy, etc.)
☒ Petition is continuously paginated
☒ Section headings and references to appendices are bookmarked and/or hyperlinked

2. Cover Page Requirements

☒ Name of the school
☒ Year the school intends to open
☒ General location of the school (such as school district, county, city, etc.)
☒ Contact information for the primary representative of the petitioning group (including name, address, phone number, and e-mail address)

3. Table of Contents

☒ Organized in alignment with the New Charter Petitioner Guidance document
☒ Page numbers are accurate
☒ Section titles are hyperlinked to the corresponding page of the petition

4. Executive Summary

☒ One page maximum
☒ Introduces the school's organizational structure
☒ Introduces the school's educational program
☒ Provides an overview of the community need for such a program
☒ Summarizes student outcome expectations

5. Mission Statement

☒ Succinctly relays the purpose and educational philosophy of the school

Section I: Educational Program

1. General Standards of Quality

   a. **Thorough and Compliant** - The petition provides a thorough explanation of the intended educational program.
   b. **Supported and Credible** - The petition includes references to relevant research and documentation of the success of the proposed model. Alternatively, if the model is new and research is unavailable, the petition describes the reasoning behind the approach.
   c. **Connected and Cohesive** - The petition presents an overall educational program that is aligned to the mission and vision and is cohesive with other sections of the petition.

2. Educational Philosophy (New Charter Petitioner Guidance, Pg.8)

   a. The educational philosophy clearly relates to the school's mission and instructional model.
   b. Research and widely accepted best practices support the educational philosophy.

3. Student Academic Achievement Standards (New Charter Petitioner Guidance, Pg.8-9)

   a. Academic and programmatic goals convey the educational program's anticipated achievement outcomes.
   b. Academic and programmatic goals reflect high standards for the target population.
   c. The goals are logically connected to the school's mission.

4. Key Educational Design Elements, Curricula, Tools, & Instructional Methods (New Charter Petitioner Guidance, Pg.9-10)

   a. Key design elements are thorough and directly relate to the educational program as well as the mission and vision of the proposed school.
   b. Explanations and examples of instructional practices, types of curricula, and tools are detailed, realistic, and consistent with the proposed educational program.

5. Strategies for Serving Special Populations (New Charter Petitioner Guidance, Pg. 10 – 11)

   a. The special services plan is complete and addresses the needs of special populations, including, but not limited to: special education, at-risk, gifted, and English Language Learners.

c. The special populations plan appears feasible within the constraints of the proposed academic program.
d. The plan demonstrates an understanding of the unique needs of the special populations in the proposed target market.

6. Professional Development Plan (New Charter Petitioner Guidance, Pg. 11)

a. The professional development plan addresses new teacher orientation and onboarding.
b. The professional development plan includes training specific to the proposed educational model as well as the systems and structures for efficient school operations.
c. The plan aligns with the school calendar and provides learning opportunities for both groups and individuals as well as varied delivery formats such as guest professionals, off-site trainings, and professional learning communities.

Section 1: Related Appendices

Appendix F: Optional Supporting Documents

a. No appendices are required for Section I. Optional appendices support the educational program's credibility.
b. Each document is numbered within this section (i.e. F1, F2, F3, etc.).

Back to petition evaluation report

Section II: Financial and Facilities Plans

1. General Standards of Quality

   a. **Thorough and Compliant** - The financial plan and budget template evidence a thorough understanding of federal and state funding mechanisms and distributions as well as the costs associated with school operations. Revenue estimates include realistic variables and restricted funds are used appropriately.
   b. **Supported and Credible** - The petition includes sufficient documentation, assumptions, and details to demonstrate the validity of revenue and expenditure estimates.
   c. **Connected and Cohesive** - The petition's financial and facilities plan meets the stated needs of the academic program and the intended student body. The financial narrative and the budget template are aligned.

2. Fiscal Philosophy and Spending Priorities (New Charter Petitioner Guidance, Pg.12)

   a. The fiscal philosophy and spending priorities align to the mission and vision of the school.
   b. The spending priorities provide for effective school operations.
   c. The spending priorities present appropriate use of taxpayer dollars.

3. Transportation and Food Service Plans (New Charter Petitioner Guidance, Pg.12)

   a. The transportation plan (if provided) is compliant and meets the needs of the intended student population.
   b. The nutrition plan (if provided) is compliant and meets the needs of the intended student population.
   c. Cost estimates are credible and supported.
   d. The facility design and staffing plan appropriately support the stated plans for transportation and nutrition.

4. Financial Management and Monitoring Plan (New Charter Petitioner Guidance, Pg.12)

    a. The financial management and monitoring plan identifies the board's fiscal governance role.
    b. The organizational structure ensures appropriate accounting expertise either by including a business manager in the staffing plan or by contracting out services to an experienced organization. (If contracting out for services, the petition outlines the specific duties to be contracted and includes any contracts or MOUs executed to date.)
    c. The plan evidences an understanding of financial policy including accounting practices, internal controls, and related internal procedures.

5. Facilities Plan (New Charter Petitioner Guidance, Pg.13)

    a. The two facility options are detailed, realistic, and meet the school's programmatic needs.
    b. The proposed school location(s) is easily accessible to the intended student population and lies within the primary attendance area.
    c. The square footage, outdoor space, and specialty features meet the needs of the educational model.

Section II: Related Appendices

Appendix A1: Financial Summary

a. See New Charter Petitioner Guidance, pg.20-21, for more information.
b. The financial summary, which automatically populates, provides a one-page overview of the school's plan.

Appendix A2: Pre-Opening Budget

a. See New Charter Petitioner Guidance, pg.20-21 for more information.
b. The pre-opening budget is aligned to the school's start-up plan (as described throughout the narrative) through June 30th of the pre-operational year. Revenues and expenditures are supported and credible.

Appendix A3: Three-Year Operating Budget and Break-Even Year 1 Scenario

a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
b. The three–year budget provides appropriate detail for the first few years of the school's operation based on realistic enrollment expectations.

c. The budget includes a functional break-even, or "plan B" budget for the first year of operation that shows how the school can survive if it does not meet anticipated enrollment numbers. Revenues and expenditures are supported and credible.

Appendix A4: Cash Flow Projection for Initial Operating Year

a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
b. The cash flow aligns to the "full enrollment year 1 budget" column on the Operational Budgets tab. The presented budget appropriately accounts for the staggered timing of state distributions of funds and the appropriate timing of various expenditures.

Appendix A5: Facility Options

a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
b. The two or more facility options, outlined on the PCSC facilities template, are realistic.
c. Cost estimates are realistic and consider soft and hard costs of the proposed facility.

Appendix F: Optional Supporting Documents

a. Additional appendices to support the Financial and Facilities Plan Section may be included in Appendix F.
b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

Back to petition evaluation report

Section III: Board Capacity and Governance Structure

1. General Standards of Quality

    a. **Thorough and Compliant** - The articles and of incorporation and bylaws are legally compliant and address all necessary content. The petition demonstrates an understanding of the charter school board's legal responsibilities. The narrative and attachments effectively communicate the board's capacity to govern.
    b. **Supported and Credible** - The petition includes documentation of executed bylaws and filed articles of incorporation.
    c. **Connected and Cohesive** - The board membership and structure match the needs of the educational program and the oversight of school operations.

2. Governance Structure (New Charter Petitioner Guidance, Pg.13)

    a. The governance structure includes detailed descriptions of the roles that officers and board committees will play.
    b. The division of duties between governance and management are clear and appropriate.
    c. The governance structure grants the board direct oversight over school leadership and the evaluation of school leaders.
    d. The articles of incorporation and bylaws are consistent with the petition narrative.

3. Board Member Qualifications (New Charter Petitioner Guidance, Pg.13)

    a. The board member qualifications section includes a list of directors currently serving, states each director's term of service, and establishes each director's capacity to govern (qualifications, experience, etc.).
    b. Board membership reflects diverse experience and skills (such as education, law, real estate, management, financial planning, and/or community outreach).

4. Transition Plan (New Charter Petitioner Guidance, Pg.13-14)

    a. The board's transition plan from founding to the work of governance is clear and likely to be effective.
    b. The transition plan addresses concrete ways to avoid the pitfalls of "founders' syndrome."
    c. The plan includes a list of the current board members who intend to resign in order to apply for a paid position, if the school is approved.
    d. The transition plan accounts for the consistent stewardship of the school's mission and vision.

5. Board Member Recruitment and Training (New Charter Petitioner Guidance, Pg.14)

   a. A comprehensive board training plan for sustaining high-quality governance includes an identification of the scope of skills the board desires to maintain, strategies for recruitment, and processes for grooming, selecting, and onboarding new directors.
   b. Board training is detailed, specific, and comprehensive, and addresses the needs of the initial board as well as future board members.
   c. The board training plan allows for self-reflection and opportunities for stakeholders to provide feedback.

Section III: Related Appendices

Appendix B: Articles of Incorporation and Corporate Bylaws (New Charter Petitioner Guidance, Pg.22-23)

   a. Articles of incorporation are filed with the secretary of state prior to submitting the petition for review by the PCSC. The petition includes a signed copy of the articles.
   b. Included bylaws are signed and 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.

Appendix C: Board of Directors and Petitioning Group (New Charter Petitioner Guidance, Pg.23)

   a. Resumes establish each board member's credibility with regard to their service on the board.
   b. Includes a list of all persons in the petitioning group who are significantly involved in the development of the proposed school and their relevant skills.
   c. "Founders" are defined for the purposes of the enrollment lottery preference are listed.

Appendix F: Optional Supporting Documents

   a. Additional appendices to support the Board Capacity and Governance Structure Section may be included in Appendix F.
   b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

Back to petition evaluation report

Section IV: Student Demand and Primary Attendance Area

1. General Standards of Quality

    a. **Thorough and Compliant** - The petition's proposed educational program reflects the needs and demands of the local community.
    b. **Supported and Credible** - The petition includes evidence of research to document demographics and student demand.
    c. **Connected and Cohesive** - The information presented in this section aligns with the structure and intent of the educational program and facility plans.

2. Primary Attendance Area (New Charter Petitioner Guidance, Pg.15)

    a. The primary attendance area is clearly described and appears appropriate.

3. Student Demand (New Charter Petitioner Guidance, Pg.15-16)

    a. The student demand section describes and documents the need for the academic program in the identified area and provides evidence of student interest/demand for the school.
    b. The student demand section describes the demographics (documented with credible source data) of the intended neighborhood in which the school will be located.

4. Student Population (New Charter Petitioner Guidance, Pg.16)

    a. The intended student population is clear.
    b. The intended student population can be supported by community and district demographics.
    c. The estimate of the anticipated number of students the school expects to serve who will require special services is supported and credible.
    d. The staffing and educational plan is likely to support adequate special services, especially for FRL, special needs, and/or ELL students.

5. Enrollment Capacity (New Charter Petitioner Guidance, Pg.16-17)

    a. Capacity estimates include whole school and grade-level.
    b. The growth plan is clear and complete from year one through year five or to final expansion.
    c. The enrollment goals for each year and for the school at capacity are reasonable and supported by credible data.
    d. The detailed marketing and recruitment plan allocates adequate staff support and funds to the effort and the plan will likely result in the school meeting its enrollment goals.

6. Community Partnerships and Local Support (New Charter Petitioner Guidance, Pg.17)

    a. The level of community engagement with the proposed model is appropriate and adequate.
    b. Documented partnerships and local support align to the mission of the school.

7. Enrolling Underserved Families (New Charter Petitioner Guidance, Pg.17)

    a. Strategies for reaching at-risk, diverse, and underserved families, as well as families that might not be aware of the school, are well developed.
    b. Strategies for initial recruitment, as well as ongoing family and community engagement, appear reasonable and likely to be successful.

Section IV: Related Appendices

Appendix F1: District Notification Letter

a. Appendix F1 includes a dated and signed letter to the district that meets the requirements outlined in I.C. §33-5205.

Appendix F: Optional Supporting Documents

a. Additional appendices to support the Student Demand and Primary Attendance Area Section may be included in Appendix F.
b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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Section V: School Leadership and Management

1. General Standards of Quality

a. **Thorough and Compliant** - The petition describes the leadership structure including a description of the experience, qualities, and/or management style of the "right" leader for this school and details regarding the division of duties if a co-director structure is proposed. The petition also evidences clear understanding of the Idaho Standards for Effective Principals.
b. **Supported and Credible -** The petition includes documentation to support the likely success of the proposed leadership and/or management plan.
c. **Connected and Cohesive -** The leadership and management plan is aligned to other sections of the petition, including the educational program, organizational chart, and budget.

2. Leadership Team (New Charter Petitioner Guidance, Pg.17)

a. The narrative describes the responsibilities of and relationships among school leadership, the governing board, instructional leaders, and staff.
b. The petition includes a plan for evaluating school leader(s).

3. Educational Services Provider (if applicable) (New Charter Petitioner Guidance, Pg.17-18)

a. If the school has chosen to work with an EMO, CMO, or ESP to provide leadership and/or management services:

- This section includes the contact information for a representative from the organization or provider and other pertinent information such as other locations where the organization or provider operates, any available achievement, operational, and financial data, and any DBAs.
- This section details the nature and extent of the entity's participation in the management and operation of the school.
- This section describes how the school's board will regularly evaluate the performance of the EMO, CMO, or ESP.

Section V: Related Appendices

Appendix D: School Administration and Organization Chart (New Charter Petitioner Guidance, Pg.23)

a. The organizational chart includes board of directors, administration, business management, contractors (including EMO/CMO, if applicable), and support staff.
b. If the lead administrator has been identified, Appendix D includes his/her resume and additional pertinent information, including real or potential conflicts of interest.
c. If the lead administrator has not been identified, Appendix D includes job descriptions and/or description of responsibilities for key leadership positions.

Appendix E: Education Service Provider (if applicable) (New Charter Petitioner Guidance, Pg.24)

a. A thorough term sheet provides the term length and termination agreement.
b. If applicable, Appendix E includes the two most recent contracts that the ESP has executed with operating charter schools.
c. The detailed description of the ESP's relationship to the school's board includes any conflicts of interest.
d. If applicable, the detailed description of how and why the management organization or educational service provider was selected provides evidence that the organization provides high-quality service to similar schools.

Appendix F: Optional Supporting Documents

a. Additional appendices to support the School Leadership and Management Section may be included in Appendix F.
b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

Back to petition evaluation report

Section VI: Virtual and Blended Schools

1. General Standards of Quality

a. **Thorough and Compliant** - The petition provides a detailed description of the proposal, and establishes the need for such a program.
b. **Supported and Credible** - The petition includes documentation to evidence the validity of the chosen Learning Management system (LMS), curriculum, and instructional structure.
c. **Connected and Cohesive** - The design of the program is aligned to other sections of the petition including, but not limited to, the budget, staffing plan, and mission.

2. Learning Management System (New Charter Petitioner Guidance, Pg.18)

a. The description of the chosen LMS addresses the technology platform, curriculum, and rationale for the structure of the program.
b. The LMS appears adequate to fulfill the mission and meet identified goals.
c. All students can be served via the identified LMS.

3. Educational Program-Virtual and Blended (New Charter Petitioner Guidance, Pg.19-20)

a. There is a strong rationale for use of a virtual program, rather than a brick-and-mortar program, to fulfill the mission and meet stated goals.
b. The plan to ensure all students have access to the virtual educational program is complete and demonstrates thoughtfulness and planning of petitioners to market to and address educational needs of all students.
c. The expectations for online teachers include required availability and the role that he/she plays in individualizing and providing guidance on course material.
d. The student work assessment plan includes the level of teacher involvement required in evaluating and responding to student performance.
e. The described means by which student will interact with teachers includes timely and frequent feedback about student progress.
f. The opportunities for student-to-student interaction are practical, diverse, and likely to cultivate school community.
g. The educational program offers new opportunities for families.

4. Technology (New Charter Petitioner Guidance, Pg.20)

a. A plan for ensuring equal access to all students includes the provision of necessary hardware, software, and internet connectivity required for participation in online coursework.
b. The plan for provision of technical support relevant to the delivery of online courses is cost-effective, timely, and supported by adequate staff.
c. The plan for training students and parents in the use of hardware and software is practicable.

5. Professional Development (New Charter Petitioner Guidance, Pg.20)

a. The strategies for professional development specific to education in the virtual environment address both initial and ongoing training.
b. The teacher evaluation plan includes strategies specific to virtual education.

6. Data Collection/Attendance and Course Credit (New Charter Petitioner Guidance, Pg.20)

a. The means of verifying student attendance demonstrate that attendance will focus primarily on coursework and activities correlated to the thoroughness standards.
b. The proposed means of awarding course credit are adequate.
c. The strategies for administering standardized testing to all students are practicable and affordable.

Section VI: Related Appendices

Appendix F: Optional Supporting Documents

a. No appendices are required to support Section VI. Optional appendices support the virtual educational program's crediblity.
b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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CHARTER SCHOOL PERFORMANCE CERTIFICATE

This performance certificate is executed on this 13th day of February, 2020, by and between the Idaho Public Charter School Commission (the "Authorizer"), and Anser of Idaho, Inc. (the "School"), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Law, Idaho Code Section 33-5201 *et seq*, as amended (the "Charter Schools Law.")

RECITALS

WHEREAS, on September 28, 1998, the Independent School District of Boise approved a charter petition for the establishment of the School; and

WHEREAS, the School began operations in the year 1999.

WHEREAS, on November 1, 2019, the Independent School District of Boise and the School agreed to a transfer of the School's performance certificate and charter to the Authorizer effective July 1, 2020.

NOW THEREFORE in consideration of the foregoing recitals and mutual understandings, the Authorizer and the School agree as follows:

SECTION 1: AUTHORIZATION OF CHARTER SCHOOL

A. Establishment of School. Pursuant to the Charter Schools Law, the Authorizer hereby approves the establishment of the School on the terms and conditions set forth in this Charter School Performance Certificate (the "Certificate"). The approved Charter is attached to this Certificate as Appendix D.

B. Pre-Opening Requirements. Pursuant to Idaho Code Section 33-5206(6), the Authorizer may establish reasonable pre-opening requirements or conditions ("Pre-Opening Requirements") to monitor the start-up progress of a newly approved public charter school to ensure that the school is prepared to open smoothly on the date agreed. The School shall not commence instruction until all pre-opening requirements have been completed to the satisfaction of the Authorizer. Pre-opening requirements are attached as Appendix C. If all pre-opening conditions have been completed to the satisfaction of the Authorizer, the School shall commence operations/instruction with the first day of school in Fall 1999. In the event that all pre-opening conditions have not been completed to the satisfaction of the Authorizer, the School may not commence instruction on the scheduled first day of school. In such event, the Authorizer may exercise its authority on or before July 20 to prohibit the School from

commencing operation/instruction until the start of the succeeding semester or school year.

C. **Term of Agreement.** This Certificate is effective as of July 1, 2020 and shall continue through June 30, 2024, unless earlier terminated as provided herein.

SECTION 2: SCHOOL GOVERNANCE

A. **Governing Board.** The School shall be governed by a board (the "Charter Board") in a manner that is consistent with the terms of this Certificate so long as such provisions are in accordance with state, federal, and local law. The Charter Board shall have final authority and responsibility for the academic, financial, and organizational performance of the School. The Charter Board shall also have authority for and be responsible for policy and operational decisions of the School, although nothing herein shall prevent the Charter Board from delegating decision-making authority for policy and operational decisions to officers, employees and agents of the School, as well as third party management providers.

B. **Articles of Incorporation and Bylaws.** The articles of incorporation and bylaws of the entity holding the charter shall provide for governance of the operation of the School as a nonprofit corporation and public charter school and shall at all times be consistent with all applicable law and this Certificate. The School shall notify the Authorizer of any modification to the Articles or Bylaws within five (5) business days of approval by the Charter Board.

C. **Charter Board Composition.** The composition of the Charter Board shall at all times be determined by and consistent with the Articles and Bylaws and all applicable law and policy. The Charter Board shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five (5) business days of their taking effect.

SECTION 3: EDUCATIONAL PROGRAM

A. **School Mission.** The mission of the School is as follows: To educate the whole child in a collaborative learning community where individuals are inspired to be self-motivated and to feel a sense of connection and responsibility to the world.

B. **Grades Served.** The School may serve students in grades K-8.

C. **Design Elements.** The School shall implement and maintain the following essential design elements of its educational program:

Community – Anser educates the whole child and serves families in a learning community founded on collaboration, character, and compassion.

Expedition – A year-long or semester long multi-disciplinary investigation framed through guiding questions, through which students learn to think deeply, critically, and to make connections between their learning and their world.

Service – Consequential service to others is woven into every Expedition and into the life of the school.

Adventure – Any physical, intellectual, or artistic experience that involves risk, challenge, and discovery. These kinds of experiences help learners realize they can do more than they thought possible.

D. **Standardized Testing.** Students of the School shall be tested with the same standardized tests as other Idaho public school students.

E. **Accreditation.** The School shall be accredited as provided by rule of the state board of education.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

A. **Oversight Allowing Autonomy.** The Authorizer shall comply with the provisions of Charter School Law and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School. The Authorizer's Role will be to evaluate the School's outcomes according to this Certificate and the Performance Framework rather than to establish the process by which the School achieves the outcomes sought.

B. **Charter School Performance Framework.** The Charter School Performance Framework ("Performance Framework") is attached and incorporated into this agreement as Appendix B. The Performance Framework shall be used to evaluate the School's academic, financial and operational performance, and shall supersede and replace any and all assessment measures, educational goals and objectives, financial operations metrics, and operational performance metrics set forth in the Charter and not explicitly incorporated into the Performance Framework. The specific terms, form and requirements of the Performance Framework, including any required indicators, measures, metrics, and targets, are determined by the Authorizer and will be binding on the School.

C. **Authorizer to Monitor School Performance.** The Authorizer shall monitor and report on the School's progress in relation to the indicators, measures, metrics and targets set out in the Performance Framework. The School shall be subject to a formal review of its academic, mission-specific, operational, and financial performance at least annually.

D. **School Performance.** The School shall achieve an accountability designation of *Good Standing* or *Honor* on each of the three sections of the Performance Framework. In the event the School is a party to a third party management contract which includes a deficit protection clause, the School shall be exempt from some or all measures within the financial portion of the Performance Framework. In accordance with Charter School Law,

the Authorizer shall renew any charter in which the public charter school met all of the terms of its performance certificate at the time of renewal.

E. **Performance Framework As Basis For Renewal of Charter.** The School's performance in relation to the indicators, measures, metrics and targets set forth in the Academic and Mission-Specific, Operational and Financial sections of the Performance Framework shall provide the basis upon which the Authorizer will decide whether to renew the School's Charter at the end of the Certificate term. As part of the Performance Framework, the Authorizer agrees to consider mission-specific, rigorous, valid, and reliable indicators of the School's performance. These negotiated indicators will be included in the Mission-Specific portion of the Academic and Mission Specific section of the Performance Framework.

F. **Authorizer's Right to Review.** The School will be subject to review of its academics, operations and finances by the Authorizer, including related policies, documents and records, when the Authorizer deems such review necessary. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.

G. **Site Visits.** In addition to the above procedures, the Charter School shall grant reasonable access to, and cooperate with, the Authorizer, its officers, employees and other agents, including allowing site visits by the Authorizer, its officers, employees, or other agents, for the purpose of allowing the Authorizer to fully evaluate the operations and performance of the School. The Authorizer may conduct a site visit at any time if the Authorizer has reasonable concern regarding the operations and performance of the School. The Authorizer will provide the School reasonable notice prior to its annual site visit to the School. The School shall have an opportunity to provide a written response to the site visit report no later than fourteen (14) days prior to the meeting at which the report is to be considered by the Authorizer. If no written response is provided, the School shall have the opportunity to respond orally to the site visit report at the meeting.

H. **Required Reports.** The School shall prepare and submit reports regarding its governance, operations, and/or finances according to the established policies of and upon the request of the Authorizer. However, to the extent possible, the Authorizer shall not request reports from the School that are otherwise available through student information systems or other data sources reasonably available to the Authorizer.

SECTION 5: SCHOOL OPERATIONS

A. **In General.** The School and the Charter Board shall operate at all times in accordance with all federal and state laws, local ordinances, regulations and Authorizer policies applicable to charter schools.

B. **Maximum Enrollment.** The maximum number of students who may be enrolled in the

school shall be 709 students. Annually, no less than two (2) months prior to the Anser of Idaho, Inc. lottery application deadline, the Board of Directors will establish, at its regularly scheduled meeting, by motion and vote, an 'Annual Enrollment Capacity' for each grade level (K-8), not to exceed the maximum enrollment number (709). Each year, the Administration will: (1) Recommend annual enrollment capacity numbers by grade to the Board. (2) Post the Annual Enrollment Capacity information on the school's website within five (5) days of the Board vote; and (3) conduct the lottery and enrollment process in compliance with the limits established in the Board's Annual Enrollment Capacity motion and vote.

C. **Enrollment Policy.** The School shall make student recruitment, admissions, enrollment and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the charter school than there are spaces available, the charter school shall select students to attend using a random selection process that shall be publicly noticed and open to the public.

D. **School Facilities.** 202 E. 42nd St., Garden City, Idaho, 83714. The School shall provide reasonable notification to the Authorizer of any change in the location of its facilities.

E. **Attendance Area.** The School's primary attendance area is as follows: Independent School District of Boise #1 boundaries.

F. **Staff.** Instructional staff shall be certified teachers as provided by rule of the state board of education. All full-time staff members of the School will be covered by the public employee retirement system, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.

G. **Alignment with All Applicable Law.** The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

A. **General.** The School shall comply with all applicable financial and budget statutes, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School Performance Framework incorporated into this contract as Appendix B.

B. **Financial Controls.** At all times, the Charter School shall maintain appropriate governance and managerial procedures and financial controls which procedures and

controls shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them (2) a checking account; (3) adequate payroll procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants in accordance with applicable state and federal law.

C. **Financial Audit.** The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.

D. **Annual Budgets.** The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format and any other format as may be reasonably requested by the Authorizer.

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

A. **Termination by the School.** Should the School choose to terminate its Charter before the expiration of the Certificate, it may do so upon written notice to the Authorizer. Any school terminating its charter shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

B. **Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one (1) or more of the terms of its Certificate. Any school which is not renewed shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

C. **Revocation.** The School's Charter may be revoked by the Authorizer if the School has failed to meet any of the specific, written renewal conditions attached, if applicable, as Appendix A for necessary improvements established pursuant to Idaho Code§ 33-5209B(1) by the dates specified. Revocation may not occur until the public charter school has been afforded a public hearing, unless the Authorizer determines that continued operation of the public charter school presents an imminent public safety issue. If the School's Charter is revoked, the School shall work with the Authorizer ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol

established by the Authorizer attached as Appendix E.

D. Dissolution. Upon termination of the Charter for any reason by the Charter Board, or upon nonrenewal or revocation, the Charter Board will supervise and have authority to conduct the winding up of the business and other affairs of the School; provided, however, that in doing so the Authorizer will not be responsible for and will not assume any liability incurred by the School. The Charter Board and School personnel shall cooperate fully with the winding up of the affairs of the School.

E. Disposition of School's Assets upon Termination or Dissolution. Upon termination of the Charter for any reason, any assets owned by the School shall be distributed in accordance with Charter Schools Law.

SECTION 8: MISCELLANEOUS

A. No Employee or Agency Relationship. None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, ownership, or employment between the Authorizer and the School.

B. Additional Services. Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.

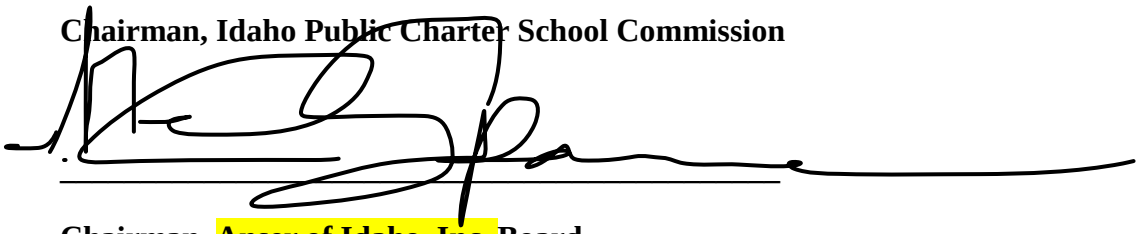
C. No Third-Party Beneficiary. This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.

D. Amendment. This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and the School have executed this Performance Certificate to be effective July 1, 2020.

_____

Chairman, Idaho Public Charter School Commission



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Chairman, Anser of Idaho, Inc. Board

Appendix A: Conditions of Authorization/Renewal
Appendix B: Performance Framework
Appendix C: Charter
Appendix D: Public Charter School Closure Protocol

Appendix A: Conditions of Authorization / Renewal

No conditions of authorization or renewal are applicable.

Appendix B: Performance Framework

Anser Charter School
[YEAR] ANNUAL PERFORMANCE REPORT

INTRODUCTION

Each year, Idaho's Public Charter School Commission (PCSC) issues a performance report to every school in its portfolio. The annual report serves several purposes:

1. To provide transparent, data-driven information about charter school quality;

2. To ensure charter school boards have access to clear expectations and are provided maximum opportunity to correct any deficiencies prior to their renewal year; and

3. To inform mid-term authorizing decisions, such as the evaluation of charter amendment proposals.

This report contains an overview of the school, including its mission, leadership, and demographics. The overview is followed by the school's performance framework, including outcomes for the most recently completed school year.

The performance framework clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the PCSC's evaluations of the school. It contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship.

In accordance with Idaho law, the performance framework requires, at a minimum, that each school meet applicable federal, state, and authorizer goals for student achievement. It is designed to fulfill this requirement while respecting the diverse missions and student populations represented in PCSC portfolio schools. This performance framework was adopted by the Idaho Public Charter School Commission on May 4th, 2017.

To facilitate a clear context for the academic results contained in this report, the demographic, enrollment, and school leadership information provided is from the school year during which the data was gathered. Updated enrollment and school leadership information is available upon request from the school or PCSC office.

The data provided in this report was gathered primarily through the State Board of Education and State Department of Education. An independent financial audit and any applicable mission-specific data were submitted directly by the school. The school had a opportunity to correct or clarify its framework outcomes prior to the publication of this report.

Public charter school operations are inherently complex. For this reason, readers are encouraged to consider the scores on individual measures within the framework as a starting point for gaining a full, contextualized understanding of the school's performance.

PERFORMANCE FRAMEWORK STRUCTURE	
The academic section comprises the primary indicators on which most renewal or non-renewal decisions are based. The mission-specific, operational, and financial sections contribute additional indicators that are, except in cases of egregious failure to meet standards, considered secondary.	
Academic	The academic section focuses on quantitative academic outcomes. It reflects the PCSC's commitments to considering schools' performance in the context of their communities and student populations. Although some results may not be made publicly available in certain cases, in order to protect individually identifiable student information, the PCSC may still use this information for purposes of making authorizing decisions.
Mission-Specific	The mission-specific section provides an opportunity for meaningful acknowledgement of schools' achievements that are not reflected elsewhere in the framework. These measures may be academic or non-academic in nature, but must be objective and data-driven. Mission-specific measures are generally optional; however, inclusion of certain mission-specific measures may be required as a condition of the performance certificate.
Operational	The operational section considers whether schools are operating in compliance with federal and state law, authorizer requirements, and the provisions of their performance certificates.
Financial	The financial section evaluates the near-term and long-term financial status of the school. Schools with management contracts containing deficit protection clauses may be exempted from these indicators.

ACCOUNTABILITY DESIGNATIONS	
Calculation of the percentage of eligible points earned for each school determines that school's accountability designation in each section. The accountability designations, in turn, guide authorizing decisions. The PCSC will consider contextual factors affecting a school's accountability designations when making authorizing decisions.	
Honor	Schools achieving at this level in all sections are guaranteed renewal. Replication and expansion proposals are likely to succeed.
Good Standing	Schools achieving at this level in the academic section will be recommended for renewal; however, conditional renewal may be recommended if outcomes in other sections are poor. Replication and expansion proposals will be considered.
Remediation	Schools achieving at this level in the academic section may be recommended for non-renewal or conditional renewal, particularly if outcomes in other sections are poor. Replication and expansion proposals are unlikely to succeed.
Critical	Schools achieving at this level in the academic section face a strong likelihood of non-renewal, particularly if outcomes in other sections are also poor. Replication and expansion proposals will not be considered.

SCHOOL OVERVIEW			
Mission Statement	Anser's mission is to educate the whole child in a collaborative learning community where individuals are inspired to be self-motivated and to feel a sense of connection and responsibility to the world.		
Key Design Elements	**Community** - Anser educates the whole child and serves families in a learning community founded on collaboration, character and compassion. **Expedition -** A year-long or semester-long multi-disciplinary investigation framed through guiding questions, through which students learn to think deeply, critically, and to make connections between their learning and their world. **Service -** Consequential service to others is woven into every expedition and into the life of the school **Adventure -** Any physical, intellectual, or artistic experience that involves risk, challenge, and discovery. These kinds of experiences help learners realize they can do more than they thought possible.		
School Location	202 E 42nd St Garden City, ID 83714	**School Phone**	208-426-9840
Surrounding District	Boise School District		
Opening Year	1999		
Current Term			
Grades Served	K-8		
Enrollment (Approved)	709	**Enrollment (Actual)**	

SCHOOL LEADERSHIP	

STUDENT DEMOGRAPHICS				
	School	**State**	**Surrounding District**	**Neighboring District**
Non-White				
Limited English Proficiency				
Special Needs				
Free and Reduced Lunch				

ISAT PROFICIENCY RATES	
Percentage of students meeting or exceeding proficiency in Math	
Percentage of students meeting or exceeding proficiency in English Language Arts	
Percentage of students meeting or exceeding proficiency in Science	

GO-ON RATE (Post-secondary enrollment within 12 months of graduation)	

SCORECARD **ACADEMIC YEAR**

ACADEMIC	Measure	Points Possible K-8	Points Earned K-8	Points Possible 9-12	Points Earned 9-12	Points Possible K-12	Points Earned K-12	Points Possible Alternative	Points Earned Alternative
State Proficiency Comparison	1a	50	0	50		50			
	1b	50	0	50		50			
District Proficiency Comparison	2a	50	0	50		50		50	
	2b	50	0	50		50		50	
Criterion-Referenced Growth	3a	100	0			50			
	3b	100	0			50			
Norm-Referenced Growth	4a			100		50		50	
	4b			100		50		50	
Post-Secondary Readiness	5a			125		125		100	
Total Academic Points		400	0	525		525		300	
% of Academic Points			0%						

MISSION-SPECIFIC	Measure	Points Possible	Points Earned
	1		
	2		
	3		
	4		
	5		
	6		
Total Mission-Specific Points			
% of Mission-Specific Points			

Anser has chosen not to include mission-specific measures

OPERATIONAL	Measure	Points Possible	Points Earned
Educational Program	1a	25	0
	1b	25	0
	1c	25	0
	1d	25	0
Financial Management & Oversight	2a	25	0
	2b	25	0
	2c	25	0
Governance & Reporting	3a	25	0
	3b	25	0
	3c	25	0
	3d	25	0
	3e	25	0
	3f	25	0
School Environment	4a	25	0
	4b	25	0
Additional Obligations	5a	25	0
Total Operational Points		400	0
% of Operational Points			0%

FINANCIAL	Measure	Points Possible	Points Earned
Near-Term	1a	50	0
	1b	50	0
	1c	50	0
	1d	50	0
Sustainability	2a	50	0
	2b	50	0
	2c	50	0
	2d	50	0
Total Financial Points		400	0
% of Financial Points			0%

The financial measures above are based on industry standards. They are not intended to reflect nuances of the school's financial status. Please see the financial section of this framework for relevant contextual information that may alleviate concern.

ACCOUNTABILITY DESIGNATION	Range (% of Points Possible)	Academic Gen Ed Outcome	Academic Alt Outcome	Range	Mission Specific Outcome	Range	Operational Outcome	Range	Financial Outcome
Honor	75% - 100%			75% - 100%		90% - 100%		85% - 100%	
Good Standing	55% - 74%	0%	0%	55% - 74%	N/A	80% - 89%	0%	65% - 84%	0%
Remediation	31% - 54%			31% - 54%		61% - 79%		46% - 64%	
Critical	0% - 30%			0% - 30%		0% - 60%		0% - 45%	

School outcomes will be evaluated in light of contextual information, including student demographics, school mission, and state/federal requirements.

ACADEMIC K-8

All proficiency and growth measures will be scored using the ISAT by SBAC, or any state-required standardized test as may replace it. Subject area (math and ELA) may be replaced by similar subject areas if necessary due to statewide changes. On all applicable measures, standard rounding to the nearest whole number will be used for scoring purposes. Measures based on ISAT outcomes exclude alternate ISAT data; as a result, the outcomes shown may differ slightly from those published on the State Department of Education's website.

	INDICATOR 1: STATE PROFICIENCY COMPARISON			
Measure 1a	**Do math proficiency rates meet or exceed the state average?**	**Result**	**Points Possible**	**Points Earned**
Math Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in math exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

Measure 1b	**Do English Language Arts proficiency rates meet or exceed the state average?**	**Result**	**Points Possible**	**Points Earned**
ELA Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in ELA exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

INDICATOR 2: DISTRICT PROFICIENCY COMPARISON

		Result	Points Possible	Points Earned
Measure 2a	**Do math proficiency rates meet or exceed the district average?**			
Math Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in math either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Boise School District used for comparison.			

		Result	Points Possible	Points Earned
Measure 2b	**Do ELA proficiency rates meet or exceed the district average?**			
ELA Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in ELA either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Boise School District used for comparison.			

INDICATOR 3: CRITERION-REFERENCED STUDENT GROWTH (GRADES K-8)

Measure 3a	Are students making adequate academic growth to achieve math proficiency within 3 years or by 10th grade?	Result	Points Possible	Points Earned
Criterion-Referenced Growth Math	**Exceeds Standard:** At least 85% of students are making adequate academic growth in math.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in math.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in math.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in math.		0-25	0
				0
Notes				

Measure 3b	Are students making adequate academic growth to achieve English Language Arts proficiency within 3 years or by 10th grade?	Result	Points Possible	Points Earned
Criterion-Referenced Growth ELA	**Exceeds Standard:** At least 85% of students are making adequate academic growth in ELA.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in ELA.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in ELA.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in ELA.		0-25	0
				0
Notes				

OPERATIONAL

INDICATOR 1: EDUCACTIONAL PROGRAM

		Result	Points Possible	Points Earned
Measure 1a **Implementation of Educational Program**	**Is the school implementing the material terms of the educational program as defined in the charter and performance certificate?**			
	Meets Standard: The school implements the material terms of the mission, vision, and educational program in all material respects, and the implementation of the educational program reflects the essential elements outlined in the charter and performance certificate. A cohesive professional development program is utilized.		25	
	Partially Meets Standard: The school partially implements the material terms of the mission, vision, and educational program. However, implementation is incomplete, not cohesive, inconsistent, unclear, and/or unsupported by adequate resources and professional development.		15	
	Does Not Meet Standard: The school has deviated from the material terms of the mission, vision, and/or essential elements of the educational program as described in the performance certificate, without an approved amendment, such that the program provided differs substantially from the program described in the charter and performance certificate.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1b **Educational Requirements**	**Is the school complying with applicable educational requirements?**			
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to educational requirements, including but not limited to: Instructional time requirements, graduation, and promotional requirements, content standards including the Common Core State Standards, the Idaho State Standards, state assessments, and implementation of mandated programming related to state or federal funding.		25	
	Partially Meets **Standard:** The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to educational requirements; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to educational requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

OPERATIONAL

Measure 1c	Is the school protecting the rights of students with disabilities?	Result	Points Possible	Points Earned
Students with Disabilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to: Equitable access and opportunity to enroll; identification and referral, appropriate development and implementation of IEPs and Section 504 plans; operational compliance, including provisions of services in the LRE and appropriate inclusion in the school's academic program, assessments, and extracurricular activities; discipline, including due process protections, manifestation determinations, and behavioral intervention plans; access to school's facility and programs; appropriate use of all available applicable funding.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 1d	Is the school protecting the rights of English Language Learner (ELL) students?	Result	Points Possible	Points Earned
English Language Learners				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to requirements regarding ELLs, including but not limited to: Equitable access and opportunity to enroll; required policies related to the service of ELL students; compliance with native language communication requirements; proper steps for identification of students in need of ELL services; appropriate and equitable delivery of services to identified students; appropriate accommodations on assessments; exiting students from ELL services; and ongoing monitoring of exited students.		25	
	Partially Meets Standard: The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of ELL students; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to requirements regarding ELLs; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

INDICATOR 2: FINANCIAL MANAGEMENT AND OVERSIGHT

		Result	Points Possible	Points Earned
Measure 2a	**Is the school meeting financial reporting and compliance requirements?**			
Financial Reporting and Compliance				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial reporting requirements, including but not limited to: Complete and on-time submission of financial reports including annual budget, revised budgets (if applicable) periodic financial reports as required by PCSC, and any reporting requirements if the board contracts with an Education Service Provider; on-time completion and submission of the annual independent audit and corrective action plans (if applicable); and all reporting requirements related to the use of public funds.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial reporting requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial reporting requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 2b	**Is the school following General Accepted Accounting Principles (GAAP)**			
GAAP				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit, including but not limited to: An unqualified audit option, an audit devoid of significant findings and conditions, material weakness, or significant internal control weaknesses; and an audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit. Any matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits failure to comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 2c	**Is the school successfully enrolling the projected number of students?**			
Enrollment Variance				
	Meets Standard: Enrollment variance equaled or exceeded 95 percent in the most recent fiscal year.		25	
	Partially Meets Standard: Enrollment variance was between 90 and 95 percent in the most recent fiscal year.		15	
	Does Not Meet Standard: Enrollment variance was less than 90 percent in the most recent fiscal year.		0	
				0
Notes	Enrollment variance is calculated by dividing actual mid-term enrollment by the enrollment projection in the school's board-approved budget, as submitted to the SDE at the beginning of the fiscal year.			

INDICATOR 3: GOVERNANCE AND REPORTING

		Result	Points Possible	Points Earned
Measure 3a	**Is the school complying with governance requirements?**			
Governance Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board, including but not limited to: board policies; board bylaws; code of ethics; conflicts of interest; board composition; and compensation for attendance at meetings.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to governance by its board; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 3b	**Is the board fulfilling its oversight obligations?**			
Board Oversight				
	Meets Standard: The school's board practices consistent, effective oversight of the school, including but not limited to frequent review of the school finances and academic outcomes. Board meeting agendas, packets, and minutes reflect competent oversight practices and actions to foster academic, operational, and financial strength of the school, including ongoing board training, policy review, and strategic planning. The school's board has adopted and maintains a complete policy book.		25	
	Partially Meets Standard: Some of the school board's oversight practices are underdeveloped, inconsistent, incomplete, or reflect a need for additional training. Board meeting agendas, packets, and minutes reflect meaningful efforts toward self-evaluation and improvement. The school's policy book may be substantially complete but require additional maintenance.		15	
	Does Not Meet Standard: The school's board fails to practice consistent, effective oversight of the school, and/or documentation of competent oversight practices and actions is not maintained. The school's policy book may be incomplete, unmaintained, or non-existent.		0	
				0
Notes				

Measure 3c	**Is the school complying with reporting requirements?**	**Result**	**Points Possible**	**Points Earned**
Reporting Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities, including but not limited to: accountability tracking; attendance and enrollment reporting; compliance and oversight; and additional information requested by the authorizer.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3d	**Is the school complying with public transparency requirements?**	**Result**	**Points Possible**	**Points Earned**
Public Transparency				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency, including but not limited to: maintenance of its website, timely availability of board meeting minutes, and accessibility of documents maintained by the school under the state's Freedom of Information Act, Open Meeting Law, Public Records Law, and other applicable authorities.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency. Any instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3e	**Is the school meeting employee credentialing and background check requirements?**	**Result**	**Points Possible**	**Points Earned**
Credentialing & Background Checks				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to state and federal certification and background check requirements.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to state and federal certification and background check requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to state and federal certification and background check requirements; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3f	**Is the school handling information appropriately?**	**Result**	**Points Possible**	**Points Earned**
Information Handling				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information, including but not limited to: maintaining the security of student records under the Family Educational Rights and Privacy Act and other applicable authorities; storing and transferring student and personnel records; and securely maintaining testing materials.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the handling of information; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				
	INDICATOR 4: SCHOOL ENVIRONMENT			
Measure 4a	**Is the school complying with transportation requirements?**	**Result**	**Points Possible**	**Points Earned**
Transportation				
	Meets Standard: The school provides student transportation within its primary attendance area and materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to transportation.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or requirements of the performance certificate relating to transportation; and/or provides and incomplete form of transportation services. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to transportation; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board; and/or the school does not provide transportation.		0	
				0
Notes				
Measure 4b	**Is the school complying with facilities requirements?**	**Result**	**Points Possible**	**Points Earned**
Facilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and requirements of the performance certificate relating to the school facilities and grounds, including but not limited to: Americans with Disabilities Act, fire inspections and related records, viable certification of occupancy or other required building use authorization, and documentation of requisite insurance coverage. The school facility is clean, well-maintained, and adequate for school operations.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the school facilities and grounds. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board. Additional facility maintenance and/or updates have been recommended by DBS.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the school facilities and grounds; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board. The school facility may be in need of modification or repair required by DBS.		0	
				0
Notes				

	INDICATOR 5: ADDITIONAL OBLIGATIONS			
Measure 5a	**Is the school complying with all other obligations?**	**Result**	**Points Possible**	**Points Earned**
Additional Obligations				
	Meets Standard: The school materially complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein, including but not limited to requirements from the following sources: revisions to statute and administrative rule; requirements of the State Department of Education; and requirements of the accrediting body.		25	
	Partially Meets Standard: The school largely complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein. Matters of non-compliance, if any, are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with all other material legal, statutory, regulatory, or contractual requirements contained in its charter contract that are not otherwise explicitly stated herein; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

INDICATOR 1: NEAR-TERM

		Result	Points Possible	Points Earned
Measure 1a	**Current Ratio: Current Assets divided by Current Liabilities**			
Current Ratio				
	Meets Standard: Current Ratio is greater than or equal to 1.1 OR Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's). *Note: For schools in their first or second year of operation, the current ratio must be greater than or equal to 1.1.*		50	
	Does Not Meet: Current Ratio is between 0.9 and 1.0 or equals 1.0 OR Current Ratio is between 1.0 and 1.1 and one-year trend is negative.		10	
	Falls Far Below Standard: Current ratio is less than or equal to 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1b	**Current Ratio: Cash divided by Current Liabilities**			
Cash Ratio				
	Meets Standard: Cash Ratio is greater than 1.0 OR Cash Ratio is equal to 1.0 and one-year trend is positive (current year ratio is higher than last year's).		50	
	Does Not Meet: Cash Ratio is between 0.9 and 1.0 OR Cash Ratio equals 1.0 and one-year trend is negative.		10	
	Falls Far Below Standard: Cash ratio is equal to or less than 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1c	**Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses minus Depreciation Expense/365)**			
Unrestricted Days Cash				
	Meets Standard: 60 Days Cash OR Between 30 and 60 Days Cash and one-year trend is positive. *Note: Schools in their first or second year of operation must have a minimum of 30 Days Cash.*		50	
	Does Not Meet: Days Cash is between 15-30 days OR Days Cash is between 30-60 days and one-year trend is negative.		10	
	Falls Far Below Standard: Fewer than 15 Days Cash.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1d	**Default**			
Default				
	Meets Standard: School is not in default of financial obligations. Financial obligations include, but are not limited to: nonpayment, breach of financial representation, non-reporting, non-compliance, financial judgements, loan covenants, and/or tax obligations.		50	
	Does Not Meet: School is in default of financial obligations.		0	
				0
Notes				

	INDICATOR 2: SUSTAINABILITY			
Measure 2a **Total Margin and Aggregated**	**Total Margin: Net Income divided by Total Revenue AND Aggregated Total Margins: Total 3-Year Net Income divided by Total 3-Year Revenues.**	**Result**	**Points Possible**	**Points Earned**
3-Year Total Margin	**Meets Standard:** Aggregated 3-yar Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. *Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.*		50	
	Does Not Meet: Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".		30	
	Falls Far Below Standard: Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2b **Debt to Asset Ratio**	**Debt to Asset Ratio: Total Liabilities divided by Total Assets**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: Debt to Asset Ratio is less than 0.9.		50	
	Does Not Meet: Debt to Asset Ratio is between 0.9. and 1.0		30	
	Falls Far Below Standard: Debt to Asset Ratio is greater than 1.0		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2c **Cash Flow**	**Cash Flow: Multi-Year Cash Flow = Year 3 Total Cash - Year 1 Total Cash AND One -Year Cash Flow = Year 2 Total Cash - Year 1 Total Cash**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: Multi-Year Cumulative Cash Flow is positive and Cash Flow is positive each year OR Multi-Year Cumulative Cash Flow is positive, Cash Flow is positive in one of two years, and Cash Flow in the most recent year is positive. Note: Schools in their fist or second year of operation must have positive cash flow.		50	
	Does Not Meet: Multi-Year Cumulative Cash Flow is positive, but trend does not "Meet Standard"		30	
	Falls Far Below Standard: Multi-Year Cumulative Cash Flow is negative.		0	
				0
Notes				

Measure 2d **Debt Service Coverage Ratio**	**Debt Service Coverage Ratio: (Net Income + Depreciation + Interest Expense)/(Annual Principal, Interest, and Lease Payments)**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: Debt Service Coverage Ratio is equal to or exceeds 1.1		50	
	Does Not Meet: Debt Service Coverage Ratio is less than 1.1		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Appendix C: Charter

Anser Charter School

"We are crew, not passengers, strengthened by acts of consequential service to others." - Kurt Hahn

Beyond20

Anser Charter School

LEARN. SERVE. LEAD.

Established September 1998

Anser Charter School serves K-8 students from around the Treasure Valley from its Garden City, Idaho location.

Nichoel Baird Spencer, Anser Board President Michelle Dunstan, Anser Education Director
Heather Dennis, Anser Organization Director
202 E. 42nd St・Garden City, Idaho 83714・208.426.9840・hdennis@anserscharterschool.org

Anser Charter 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 email.

Anser Charter School

"We are crew, not passengers, strengthened by acts of consequential service to others." - Kurt Hahn

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Executive Summary

The Mission and Vision of Anser of Idaho have guided the work of Anser Charter School for 20 years where they have inspired the work of teachers, administrators, board members and parents to create a community that supports the learning of all students. Based on this strong foundation of a collective approach Anser will seek to expand this mission and vision with a larger community of families, learners and teachers to experience the rich opportunities that an EL Education (Expeditionary Learning) founded on growing the academic, social-emotional and character development of each child can provide, while incorporating the intrinsic learning opportunities that Anser has been piloting for the last two years.

Mission:

Anser of Idaho's Mission is to *"Educate the whole child in a collaborative learning community where individuals are inspired to be self-motivated and to feel a sense of connection and responsibility to the world."*

Vision:

Anser of Idaho's Vision is to "Foster learning that imagines a better world and works toward realizing it; set high academic standards; promote creativity, discovery, reflection and balance; embrace diversity; and use developmentally appropriate practices and real-world experiences to educate within a climate of collaboration, community, character, and compassion."

Executive Summary

What would a dream school look like? Over 20 years ago a group of visionary educators and dedicated parents came together, spending over three years researching, planning and dreaming to create Anser Charter School; the dream school they knew was possible. Now entering our 21st year as an EL Education (Expeditionary Learning) school, Anser is built upon a strong foundation of success. Anser was named the inaugural Governor's Charter Star honoree, has been designated a Mentor School within the EL network, was among the first EL Credentialed schools, was recognized by Idaho Leads as a Studio District of Innovation and was named a Boyer Center School of Character. Building upon two decades of experience, we strive to build on the dreams of our founders through a large scale expansion to reach into underserved communities in the Treasure Valley.

Anser's EL Education model and our unique combination of Expeditionary Learning, Community, and Service offers opportunities for students to learn outside of the four walls of the classroom in a way that no other school in the Treasure Valley has. Imagine a student who funds a library for a rural school in Africa or a student who develops, product tests and starts her own business selling lip balm. Imagine

7th-8th graders making over 5,000 lunches in one year to feed the homeless in their community. This is not just the stuff of dreams. These are real world accomplishments of Anser students. As we grow and reach more deeply into underserved communities, we will bring together these rare and powerful learning opportunities with a larger, more richly varied community of families to empower our students to become life-long learners with a sense of connection and responsibility to their community and to their world.

Core Values:

Anser embraces EL Education Design Principles (Appendix F15) as its set of core values. These principles inherently require the presence of more routine values such as integrity, respect, responsibility, courage, discipline, and compassion which encompass a broader view of success in life and work. The EL Design Principles are as follows: The Primacy of Self Discovery, The Having of Wonderful Ideas, The Responsibility for Learning, Empathy and Caring, Success and Failure, Collaboration and Competition, Diversity and Inclusion, The Natural World, Solitude and Reflection and Service and Compassion. Anser is built on these ten design principles that reflect the educational values and beliefs of Kurt Hahn, founder of Outward Bound. These principles also reflect the design's connection to other related thinking about teaching, learning and the culture of our school.

Section 1: Educational Program

"If you want your child to be surrounded by caring people, challenged to dig deeply in their learning and develop as a whole person, Anser is the place!"
Christina - Anser Parent

Educational Philosophy

At Anser, we embrace an educational approach that addresses the development and needs of the whole child - academically, socially, emotionally, and personally. Stimulated by an innovative and collaborative learning environment, students are self-motivated to discover their talents and to achieve more than they thought possible. Students and teachers become a community of learners committed to learning deeply about our world and our place in it. We believe in creating classrooms where learning is relevant, curiosity is nurtured, questions are encouraged, and dialogue is robust. Students hone skills of academic accomplishment - including critical reading, writing, mathematics - as well as skills that build personal character - discipline, courage, integrity, respect, responsibility and compassion. We believe that the deep and relevant understanding of our world builds and a sense of compelling responsibility to it is

accomplished by focusing our El Education model practices around three key areas - Expeditions, community service, and adventure.

Expeditions – Anser motivates and engages students by providing a real-world learning experience, both inside and outside the classroom. An Expedition is a framework for engaged teaching and learning, which challenges students to think creatively and take an active role in the classroom and beyond while meeting Idaho Core Standards. An Expedition is a year-long or semester long multi-disciplinary investigation into a single subject. Idaho State Standards are taught through the Expeditions in each grade level. Through depth, rather than breadth, students learn to think deeply, critically, and to make connections between their learning and their world. An Expedition has a Guiding Question that provides the inquiry point of entry into the subject.

An example of an Expedition is the Kindergarten Expedition, "What Makes a Bird a Bird?" Through inquiry students study the natural world around them to learn about the habitat, characteristics, behaviors and needs of a bird. Science, writing, research, data collection (math), fieldwork, art and service are woven into the study of birds. Students learn from conservationists, visit the Idaho Bird Observatory, and take bird counts at local parks, all to connect their learning to real world experts and real world experiences. As a culminating project, the students design bird note cards with the help of 6th grade buddies. These cards include a scientific drawing and explanation of the bird and its habitat. The notecards are sold and the students vote on a local bird conservation group to receive the funds.

Every Expedition ends with an exhibition of learning to an authentic audience. For kindergarteners this is an evening at school where they share their learning about their bird with their families, but also the many community experts who have supported their learning. This example, while for kindergarten, outlines the basic tenets of an Expedition at every grade level: an inquiry question, deep, intensive multi-disciplinary project based learning, fieldwork, community experts, art, service and adventure an exhibition of learning.

Community – Anser consistently encourages building connections with each other and our community. We support students by fostering a collaborative and cooperative learning environment. This is evident in our motto - "We are crew, not passengers."

Service and Adventure– Anser teaches students to serve others at school, at home and in the community. Students discover empathy and compassion for others and a deeper sense of who they are by giving back, mentoring fellow students and assisting others. Service and Adventure opportunities are woven into learning and provide opportunities for students to develop their own

unique identity, while understanding their connection and obligation to serve others and to overcome challenges and develop lifelong passions.

Student Academic Achievement Standards

Anser uses a three-dimensional vision of student achievement that includes mastery of knowledge and skills, character, and high-quality student work. We believe that academic success is built on strong character qualities of collaboration, perseverance, responsibility, and compassion, and that character is shaped through engaging and challenging academic work. Preparing students for state standards-based testing and monitoring student performance on these assessments is but one of many ways we measure and monitor student achievement. We understand that our students' performance on standardized states tests are an important measurement that can be used to inform our practices and is also part of the body of evidence supporting the efficacy of our model. Anser has consistently performed at or above the state and district averages for math and ELA and has set an academic goal to continue to outperform on those measures, as well as in comparison to other Boise School District schools with similar demographics. High academic standards are set for all students, including economically disadvantaged, ELL students, and students eligible for Special Education services. Anser sets the same academic goals, to outperform the subgroup district and state averages.

Anser has a school-wide system for monitoring student academic achievement. Starting at the Board level, the Continuous Improvement Committee is charged with monitoring the school's academic performance and with providing support for growth. This committee works in coordination with the Education Director (ED) to oversee the achievement monitoring plan. The plan is developed by the ED and implemented by the Literacy Specialist, classroom teachers and ECS staff, under the direction of the ED. The plan involves the collection of student achievement data throughout the year in a sequence that informs decision making at the school and the classroom level.

Annual performance goals are established in the Continuous Improvement Plan. Our goals put a focus on preparing students with strong literacy and mathematical skills, a desire for life-long learning, and a readiness for career or college. Annual academic performance targets are set for each grade level for math and literacy based on previous performance results. Starting in the 2020-2021 school year we will collect and analyze data school-wide on subpopulations of students from backgrounds traditionally considered educationally disadvantaged.

Monitoring and reporting of student performance happens throughout the year. The following table outlines the school wide assessment timeline and assessment tools. Anser uses mandatory assessments and a selection of industry-standard, research-based assessment tools. Data collection is a coordinated process involving the ED, the Literacy Specialist and classroom teachers.

Assessment Timeline

	Kindergarten - 3rd grade	2nd - 8th grade
Fall	● Idaho Reading Indicator (IRI) using I-Station computer adaptive test ○ Reading screener & diagnostic ● DMT Institute's Primary Math Assessment (PMA) ○ Math screener and diagnostic (K-2 only)	● Renaissance STAR - benchmark ○ Math ○ Reading ● AIMSWeb Curriculum-Based Measurement (CBM) ○ Reading fluency (4th - 6th) ● DMTI's Benchmark Assessment ○ Math (3rd - 6th)
Winter	● Idaho Reading Indicator (IRI) using I-Station computer adaptive test ○ Reading - progress monitoring	● Renaissance STAR - progress monitoring ○ Math ○ Reading ● ISAT interim - progress monitoring (3rd-8th) ○ Math ○ ELA/Literacy
On-going		● Renaissance STAR - progress monitoring ○ Math ○ Reading ● ISAT interim - progress monitoring (3rd-8th) ○ Math ○ ELA/Literacy
Spring	● DMT Institute's Primary Math Assessment (PMA) ● Idaho Reading Indicator (IRI) End of Year ○ Reading	● Renaissance STAR - End of Year ○ Math ○ Reading ● ISAT Summative - (3rd-8th) ○ Math ○ ELA/Literacy ○ Science (5th & 7th only)

Analysis of individual student data is done by the classroom teacher, with support from the Literacy Specialist. Teachers use the STAR math and reading benchmark results to plan interventions for individuals and groups of students, to develop groupings for differentiation of instruction, and to support student advancement. The results from the IRI allow teachers to create flexible student

grouping for targeted, small group instruction. DMT Institute (Developing Mathematical Thinking Institute) staff support teachers in the analysis of the PMA and the Benchmark assessment results, including identifying specific math concepts that need targeting for individual students and for the class. Throughout the year, teachers use STAR to guide instruction and to monitor student progress. This tool allows teachers to identify students with urgent deficits, with intervention needs, students being progress monitored and students at or above the benchmark in math and reading. Individual results from standardized assessments are used by the Building Intervention Team (BIT) when recommending and planning interventions.

Grade level teams of teachers examine grade level cohort data to inform instructional practices and to inform school leaders of trends in performance. These grade-level teams mentor new teachers in understanding each assessment and in interpreting results. In addition, every teacher has access to staff trainings and training videos about each assessment - its implementation, its results and related data analysis tools. At a school-wide level, data is used for making decisions about resource allocation and staff professional development. Trends in student data have driven decisions about the scheduling of instructional time and the staffing of instructional blocks.

Each fall and spring, the entire teaching staff does a school-wide data investigation using a data analysis protocol. Based on this analysis, a staff-wide goal is set that becomes part of the benchmarking plan. For example, in 2019 the staff set a goal around math scores, setting goals for baseline, mid-year and year-end performance.

Key Educational Design Elements, Curricula, Tools, & Instructional Methods

Educational Model

For 20 years, Anser has been an active partner in the EL Education network. EL Education is a leading K-12 education model offering a comprehensive approach to school design and implementation. EL Education promotes *active* classrooms that are alive with discovery, problem-solving challenges, and collaboration. EL Education students have both the capacity and the passion to build a better, more just world. School structures and traditions such as crew, community meetings, exhibitions of student work, and service learning ensure that every student is known and cared for, that student leadership is nurtured, and that contributions to the school and world are celebrated. Anser has implemented the EL Education model at a consistently high level. Anser's success in the EL Education network has led us to serve as a Mentor School for more than 10 years and as a credentialed school for the past five years.

About EL Education

EL Education approaches are grounded in the philosophy of experiential education. Experiential education's roots go back to philosopher and educational theorist John Dewey and his vision of education that puts the student, not the content, at the center of the educational process [1]. Dewey's work influenced German educator Kurt Hahn, whose schools in Germany and Scotland gave rise to Outward Bound and subsequently to Expeditionary Learning Outward Bound (ELOB). ELOB eventually evolved into EL Education. Today's EL Education practices and core beliefs are linked inextricably to Hahn's life and work. Hahn, born in Berlin in 1886, formed his own vision of education in which the school would "harmonize the social and intellectual differences between its students by operating as a community of participation and active service. It would seek out the natural qualities of leadership, skill, and responsibility possessed by all in different ways when they see that they are truly needed." [2]

Many of Hahn's beliefs have been incorporated into the design of experiential schools, including the following [3]:

- An appreciation for a system that develops the complete person - intellectually, morally, aesthetically — and physically too
- An appreciation for the power of failure in building a road to perseverance and success.
- A commitment to active learning
- A belief that students take responsibility for their own learning and for self-assessment
- A belief that true learning requires challenge - including outdoor challenge
- A commitment to creating compassionate young people with a sense of service to others

These beliefs form the foundation for Anser's educational model and provide direction in decision-making around instructional methods, classroom design, curriculum, behavioral expectations, and school-wide policies

Instructional Practices

Anser's instructional approaches are diverse, flexible and dovetail with our expeditionary approach to curriculum. Our model challenges students to think critically and take active roles in their classrooms and communities, resulting in higher achievement and greater engagement at school.

Teachers scaffold learning experience based on what students already know and in a way that supports and challenges a variety of learners. Teachers choose from a wide variety of lesson formats including direct instruction, the Workshop model, discovery-based lessons, protocol-based lessons, simulations, labs, video lessons and many more. Teachers explicitly share learning targets with students and consistently refer to them throughout the learning cycle. In many cases, students track their own progress towards the learning targets, one example of student-engaged assessment.

Additionally, students engage in self-assessment through written reflections, goal-setting, peer critiques, portfolio review and student-led conferences.

Understanding the needs of each student begins with our classroom structure. Each classroom is led by a certified teacher, called a crew leader and this group of students forms a bond of community that we call crew. Each crew consists of 22 - 28 students, depending on the grade level. Students start each school day in a community circle called morning crew. This is just one structure of crew that allows for the students to make personal connections with each other and with the crew leader; it ensures that each student is well known and supported by peers and adults. Crew is also a structure for team-building and conflict resolution; it is a place of celebration and compassion as students share successes and failures.

Crew structure helps teachers understand and meet the needs of the "whole child" of each individual student. Teachers use daily written work, exit tickets, group work, checks for understanding, formative assessments and more to assess each learner's progress. Anser teachers make a practice of debriefing lessons to help students articulate and reflect on their learning. These classroom based assessment practices, coupled with our system of progress monitoring using standardized tools give teachers data about student progress and achievement. This data informs teachers in adjusting lesson formats and sequence, in selecting appropriate text, in creating student groupings and in differentiating instruction.

Curriculum

Anser has a strong foundation in identifying and developing a rigorous curriculum that aligns with Idaho State Standards. With few exceptions, our school does not use published curriculum packages. Rather, Anser teachers use the framework provided by the EL Education Core Practices (Appendix F5) to design and create curricula that is developmentally appropriate, accessible to all levels of students and rich in local connections. Teachers work in grade level teams to map out Idaho State standards in the content areas and then create a sequence of instruction and learning around compelling topics through a unique learning Expedition.

Learning Expeditions are interdisciplinary units where learning comes alive around real-world issues with local connections. Learning Expeditions forge together powerful learning tools and experiences - compelling topics, guiding questions, case studies, projects, fieldwork, service learning, guest experts, anchor texts, inquiry lessons and more - to create dynamic learning for all students. An example, in addition to the Kindergarten Expedition outlined above, is the 2nd/3rd grade Expedition called "Pollination Expedition" during which students explore the connections between butterflies and flowers, focusing on a case study of the Painted Lady butterfly. Students grow and study these butterflies, read

nonfiction texts, create scientific drawings and take multiple trips to the Boise Foothills to conduct field work. Students consider the questions, "*What happens when the city meets wilderness?"* and, "*What are the connections between the weather and human impact on the Boise Foothills"?* Working with local experts, students learn firsthand about trail repair and how to help lessen the damage caused by erosion. With help from Radio Boise, students create PSAs to advocate for responsible trail use to help sustain the trail system and natural environment. Throughout this Expedition, students are meeting standards in science, social studies, reading, writing, and speaking. Additionally, students are building skills in craftsmanship, collaboration and character throughout.

Learning and teaching through an Expeditionary approach allows teachers to adapt the curriculum to student needs, to pivot to new situations and to address changing local issues. Teachers regularly evaluate, adapt and update Expeditions based on our students, our community, and on vital issues.

Anser currently uses published curricula for math. In grade 6 - 8, we use Connected Math Project 3™ (CMP). CMP is a problem-centered curriculum that puts student conceptual understanding first rather than rote memorization. Additionally, CMP supports group problem-solving and dialogue around big ideas and is widely used across the country at the middle school level. Anser uses College Preparatory Math™ (CPM) course for students ready for high school mathematics content. Both Connected Math and CPM have close alignment to Common Core State Standards (CCSS). In grades K-5, Anser uses the Bridges in Mathematics™, which promotes students developing a deep understanding of concepts, working in groups, using visual models and solving novel problems. In a study of 4th and 5th grade students, children who received instruction using Bridges curriculum showed significantly greater improvement in mathematical skills than students who did not learn math using Bridges [4]. The Bridges curriculum received strong ratings from EdReports.org for its rigor, coherence and alignment to CCSS.

Discipline Philosophy

Anser Charter focuses on developing a caring, supportive school environment in which students participate fully in solving problems, including problems of behavior. We believe students' growth toward kindness, respect and critical problem solving depends on becoming active members of a caring community. We further believe it is the experience with decision-making and problem-solving that enables students to handle conflicts that arise. When students become engaged in rigorous learning Expeditions, behavior disruptions decrease. When they are stimulated, challenged, and held to high expectations, students are less likely to engage in disciplinary issues. Our dual focus on character and academics and our use of the Responsive Classroom and Restorative Justice approaches to classroom management have prevented and addressed most discipline issues.

Teaching and modeling positive behaviors are the primary approaches to discipline at Anser. As a result, children seldom engage in serious, negative behavior. One unique aspect of Anser is that the entire school has adopted and promoted a particular culture of values. In turn, this provides the foundation for individual classrooms to develop their own set of behavioral expectations. This self-governing model teaches the EL Education Design Principles and Anser Character Traits on a consistent basis through countless interactions between children, children and teachers, and other adults. Students are immersed in learning about, and expected to practice, strong character. The following traits are ones adults at Anser model in order to help students grow and interact with personal responsibility for their behavior and learning: Responsibility, Integrity, Courage, Compassion, Discipline and Respect.

Developing Positive Behavior in the Anser Community

Conflicts arise within any community. Conflict resolution is an area of the school environment that is crucial to the on-going positive nature of our program. We have spent considerable time and energy on synchronizing our values and methods for handling conflicts. As a general rule, children and adult members of our community attempt to use conflicts to teach new and/or better behaviors through a belief that restitution (making things right) is a way to help all students get to the next level of "doing the right thing." Aggressive or disruptive behavior may happen for a variety of reasons and in a variety of school settings. In line with our educational philosophy, these behaviors are handled in a variety of ways that integrate the needs of the child or children and teach and model the desired outcome. Whenever possible, those involved are invited to actively participate in ways to make the situation right and learn from their actions. Our goals are to protect each person's rights, and to help each person learn to make wise choices, caring for themselves and others.

Proactive strategies used in classrooms and throughout the school to achieve these goals are as follows:

1) Crew Meetings are utilized as a forum for discussing and problem-solving specific issues. Here, both children and teachers teach, practice and model appropriate ways of resolving conflict.

2) Behavior is viewed within the context of the student's life at school, in a particular classroom's expectations, and Anser's collaborative, respectful methods. Throughout the year/s teachers and staff are called upon to get to know and understand the children at Anser. Personal knowledge about the child's, or family's, "story" can be respectfully useful in working with the children.

3)Violent or hurtful behavior will be stopped immediately, intervening verbally if possible, physically if necessary. Physically intervening might include temporarily isolating children, restraining violent acts by placing one's self between angry children.

4) We ensure any "injured" person's rights and needs are addressed and reinforced as soon as possible. This not only informs the offending child that they have interfered with another child's rights but also begins to make the environment safe again for the "injured" child.

5) Encourage students involved to resolve the conflict by including the following:

i.) clearly state the problem

ii) generate options for correcting the problem

iii). select the solution

iv). follow up to be sure that the solution is working

6) Enlist the support of the School Support Specialist or Education Director when a student's behavior cannot be adequately addressed by the resources of just the teacher or parents involved.

7) Repeated, irresolvable conflict means something is wrong and it's our job to find out what it is. It may be a mismatch of child to school or classroom or task; it may be family challenges or trauma; it may be physical or mental illness, etc. As a collaborative, respectful school, the staff and parents of Anser are responsible for seeking advice from one another and, in some cases, outside resources (e.g., nurse, counselor, etc.). This information is always gathered in a caring and confidential manner.

Policies and procedures for handling student discipline issues with all students are designed to achieve these goals.

When Discipline Crosses Boundaries and Becomes a Major Offense

All students have the right to learn in an atmosphere that is safe, conducive to learning, and free from disruptions. The school shall enforce provisions of the code of conduct and discipline so that students demonstrating major disciplinary behaviors and their parents understand that such behavior shall not be tolerated and shall be dealt with according to the code and requirements of law.

Students are expected to and supported in conducting themselves in keeping with their level of maturity and development, with due regard for teachers and others acting in a supervisory role, the educational purposes underlying all school activities, the widely shared use of school property, and the rights and welfare of other students. Conduct which disrupts or threatens to disrupt the operation of the school, which interferes in any way with the public or private rights of other students or citizens, which threatens or endangers the health or safety of any person, or which damages property will not be tolerated and will result in immediate disciplinary action and consequences.

Students are entitled to the proper recognition and preservation of their constitutional rights, and allowance for such rights, including freedom of expression, personal appearance, and the right to petition, protection of personal property, due process, and involvement in school and community affairs. These rights are not unlimited, and must be balanced against the rights of others and the overarching purposes of the school. The "Anser Caring Community Discipline Plan" adopted and reviewed by the Anser Community Board defines 4 levels of infractions and guides the staff and the Education Director in their responses to incidents of behavior. This plan is shared in Anser's handbook which is available to all families on the Anser website and given to new families upon enrollment to ensure all community members know Anser's expectations of being a caring and respectful member of the Anser learning community for all students and adults.

Use of Technology

Anser teachers and students have widespread and consistent access to technology. Teachers have the flexibility and autonomy to determine the best application of technology for their students. Anser teachers are purposeful in these decisions, taking into consideration the developmental needs of students and the nature of the content when determining how technology fits into the learning cycle. Anser teachers view technology as a tool for learning, creating and collaborating. Students have created podcasts and websites; they have designed posters and scientific models. In STEM, students have learned to code using Scratch and Raspberry Pi. Currently, starting in 2nd grade, Anser students receive a school-based Google Drive account and access to the Google suite of applications. By junior high, students are proficient at using the word processing, spreadsheet and presentation tools. Teachers in the upper grades use Google Classroom and web-based platforms in their instruction including NEWSELA for differentiated texts, Scholastic ¿Que tal? for listening and literacy in Spanish, NCTM Interactives for math models, and Khan Academy for math practice and enrichment, to name a few.

Research Evidence on the Impact of EL Education model

Network Results. EL Education network schools have documented substantial impact on student achievement. In its 2018 annual report, EL education documents that for EL credentialed schools, including Anser, students consistently outperform their peers from their district-run schools, and students from underserved groups often see the greatest gains (Figure 1).

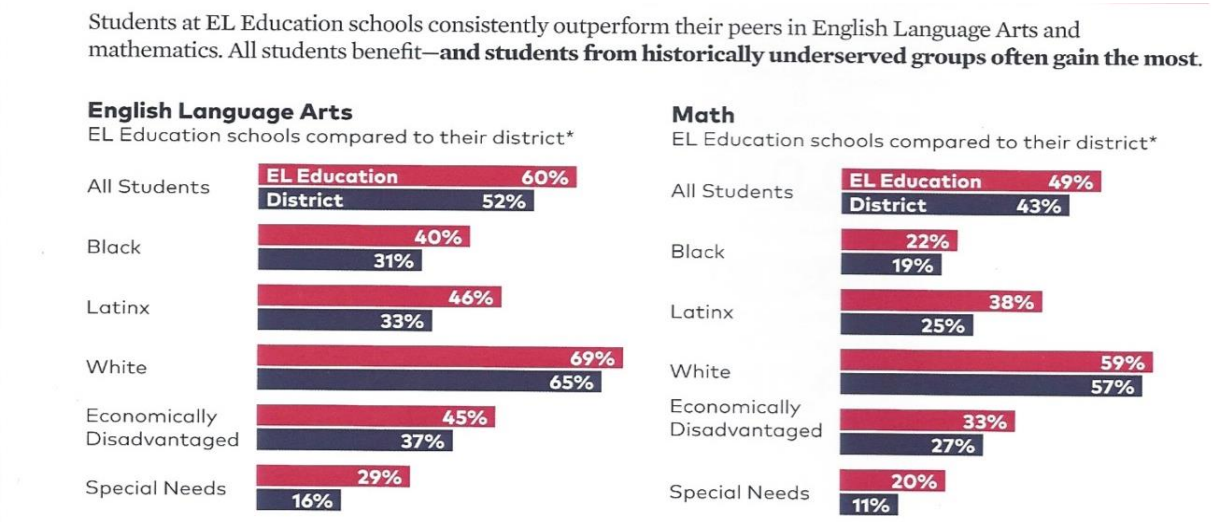

Figure 1. *2017-2018 Results for all EL Education Credentialed Schools, compared to districts in which they are located.*

Additionally, in an independent study of five EL Education middle schools, Mathematica Policy Research found that EL students experienced the equivalent of seven additional months of learning growth in reading and an additional 10 months of learning growth in math after three years in an EL education school [5]. The students in these five schools were more likely to be Hispanic and more likely to be English Language Learners. These positive results confirm our commitment to the EL model and support our desire to bring this rigorous approach to a more diverse population.

Anser Results. According to records going back to 2014, the percentage of Anser students meeting proficiency on the ELA and Math ISAT exceed that of district-wide student data in the Boise School District (BSD) and the state of Idaho. The most recent ISAT results show our school continues to meet or exceed the BSD as a whole and the state in the percent of students performing with proficiency on ISATs in ELA, math and science. Three years of Student Achievement data is available in (Appendix F4.

When looking at sub-groups of students in Anser's school population, these positive results hold true for Anser's Hispanic students. (Appendix F4).

Hispanic students benefit greatly from our educational model and show the greatest percentage of students at proficiency level. Across the nation and locally, the EL education model works for all types of learners and is especially beneficial to Hispanic and English Language Learners. Anser's consistent and successful implementation of the EL model offers the opportunity for traditionally underserved groups to have access to high quality education and to achieve high academic success. (Appendix F4)

Strategies for Serving Special Populations

Our school culture is infused with a sense of community and a belief that all students are accepted and can achieve to their highest potential. Anser is a place where everyone belongs and can succeed. It is Anser Charter School's intent to match the student body's demographic with the same diversity represented in the Boise School District. There is a comprehensive and integrated strategy to identify student needs and support all learners and we offer a continuum of services and programs. Many of our services and programs address the needs of students from both educationally disadvantaged backgrounds and students with disabilities, beginning with the identification of these students and understanding their needs. Our screening and identification process begins with enrollment when families complete the home language survey and educational background about their child. These tools identify students who are English Language Learners (ELL) and students who may have been on a learning plan.

Before school starts, teachers meet with colleagues to discuss student needs and brainstorm strategies. Classroom teachers work to establish strong relationships with families and communicate consistently to learn about each student. For our youngest students, Kindergarten teachers conduct home visits for every incoming kindergartner. Other screenings we conduct include annual hearing tests in 1st and 6th grades and GATE eligibility screening beginning in 1st grade. Anser shall ensure that the same array of academic, nonacademic, and extracurricular activities and services are available to students with disabilities as is available to students without disabilities. IDEA states that, to the maximum extent appropriate, students with disabilities are to be educated with students who are not disabled. This includes considering that a continuum of alternative placements are available to meet the needs of children with disabilities and for special education and related services.

To every extent possible, all students complete the same standards and work towards the same learning targets. With all learners present in the general education classroom, meeting the needs of all students

requires teachers to effectively differentiate instruction. Differentiation is a school wide approach whereby teachers plan instruction around student strengths and needs. Differentiation strategies include, but are not limited to, using flexible groupings of students, using high-quality differentiated texts, providing multiple pathways for meeting learning targets, providing supplemental materials, selecting diverse texts and tiering of problem sets. Teachers differentiate for students with disabilities, for advanced learners and for English language learners. Students on IEPs spend the majority of their learning in the general education classroom. The IEP team determines the services, accommodations and any needed curricular modifications based on the needs of each student.

Anser will follow the IDEA regulations in regards to Child Find to ensure that students who are suspected of having a disability are identified in kindergarten through the grades served. Classroom teachers in coordination with our Exceptional Child Services (ECS) team work diligently to identify student needs and monitor student progress. Our ECS team includes highly trained, specialized educators who work in coordination to offer a broad array of services including special education, Response to Intervention (RTI), GATE, and 504s. We will serve all students who meet state eligibility requirements for all fourteen eligibility categories as outlined under IDEA. Teachers use classroom observations and a slate of progress monitoring tools to track academic progress. These tools include the Idaho Reading Inventory (IRI), AIMSWeb Curriculum Based Measurement (CBM), CORE Phonics Survey, STAR Reading, STAR Math, and Words Their Way Primary and Elementary Inventories.

When a student is at risk for not making academic progress or has concerning behavior, classroom teachers implement a focused intervention and then monitor the progress of the intervention. Should the student not respond to the intervention, the classroom teacher will engage the help of the Building Intervention Team (BIT). This team consists of 1 - 2 classroom teachers, special education teachers, the Education Director and Literacy Specialist and the Student Support Specialist as needed. The BIT team will review the student's academic data, work samples, and classroom observations related to the area of concern and will determine if there is sufficient reason to suspect the student has a disability. The BIT team will also provide support to teachers when the area of concern is behavioral rather than academic.

If a disability is suspected Anser is responsible for following the IDEA guidelines for referral, as well as consent for assessment. The LEA (Local Education Agency) provides Procedural Safeguards Notice to parents that contain a full explanation of special education rights. Anser is responsible for determining eligibility under IDEA, which include: meets the Idaho state disability criteria as established in the Idaho Special Education Manual, disability adversely affects educational performance, and results in the need for specially designed instruction and related services. The LEA will also ensure that a free appropriate public education is available to students who attend Anser and are eligible for special education services.

Anser Charter School is responsible for providing all special education and related services to meet the needs of Anser students. For students who need specialized support, including support for behavioral issues, staff develops a learning plan tailored to that student's needs and supported by a variety of tools. ESC provides services including but not limited to the following:

- Small group instruction and academic/behavioral support for K-6 students who need special education services and supports
- Inclusion support (provided by special education teacher and paraprofessionals) in the classroom to support students with special needs
- Study Skills classes for 6th-8th grade students who need special education services
- Use of research based programs for academic instruction (Expressive Writing, Read Naturally, Language Arts, Core Knowledge Language Arts Program, Explode the Code, activities developed at the Florida Center for Reading, Connecting Math Concepts, Ascend Math, Bridges Math Intervention, Touch Math)
- Comparable services for incoming students with disabilities
- Positive Behavior Intervention Supports and Adaptive/Life-skills instruction
- OT, SLP, PT, VI, orientation and mobility, DHH, interpreter, specialized transportation, and school nursing services when required
- Supplementary aids including materials for sensory integration, equipment necessary for visually impaired, assistive technology devices, mobility devices, and hearing devices such as amplifiers, and receivers
- Extended School Year with transportation

ESC staff are highly trained, are certified in their specialized field and seek ongoing professional development. Special education staff have received training on a variety of topics through Special Education Support and Technical Assistance (SESTA) of Idaho. All ESC staff - both full time and paraprofessionals - have been trained in Right Response (de-escalation strategies, etc.) for working with students with behavioral needs. Every fall before school starts, our ESC staff meets to assess students in need and identify possible referrals. This team also presents to general education staff every fall in regards to intervention/referral processes.

Our school has been building our capacity to meet the needs of economically disadvantaged students beyond our academic and special education programs. We employ a Student Support Specialist, who is a full time school social worker, as well as a social work intern from Boise State's MSW program. Together they assess and support the social, emotional, physical, and safety needs of students and their families. The Student Support Specialist actively seeks training opportunities to expand his/her skill set in the areas of diversity and ethics as well as trainings that will benefit the students and staff at the school. For example, recently our Student Support Specialist conducted staff training regarding the

effects of trauma on students, how to recognize trauma and how to support the student through safe and predictable structures. This staff member oversees the implementation of Second Step™ to support student social/emotional growth. This curriculum helps students with problem solving, emotional awareness and empathy building.

The Student Support Specialist develops connections with community resources to provide community referrals and partnerships for basic needs- clothing, utilities/rent, food, including the following:

- Utilizes the Vineyard Church's food bank to help food insecure families
- Assists families in accessing monies for rent/utilities through the Idaho Power Community Funds
- Secures winter clothing and school supplies through Assistance League of Boise's Operation School Bell/Operation Teen Retail

The Student Support Specialist will establish additional community partnerships to support students and families as needs of the population increase. These might include having a weekend backpack food program, creating partnerships for community in school programs to assist families in having a centralized location at the school to access social service agencies, etc. Anser is close in proximity to the Boys and Girls Club and many students access their after school services for working families who need the extended child care at a low cost.

English Language Learners

It is Anser Public Charter School's goal to enroll English Language Learners (ELLs) on a level commensurate to the demographics of the surrounding community. To accomplish this goal, the Anser faculty will develop a Language Instruction Educational Program (LIEP) and plan. The plan will include steps for identification, assessment, program goals and procedures, progress monitoring, both for language development and content instruction. The LIEP plan will also identify areas of need for professional development as well as strategies for effective parent involvement in the plan development, outcomes, and school involvement.

The school uses the state approved home-language survey as part of every student's enrollment. The eligibility criteria (listed below) will be used for the Home Language Survey in order to identify the primary home language other than English. Any student with a home language survey indicating a dominant language other than/in addition to English will be given the WAPT screener by a yearly-certified WAPT proctor.

English Language Learners will take the WAPT upon registering. For students needing assessment accommodations, staff will develop an Educational Learning Plan (ELP) include curriculum, teaching strategies, academic goals, and assessment accommodations. The ECS Director and Education Director will oversee the development, delivery, and follow up with all ELPs. A certified/endorsed ENL teacher

may provide additional support for ELLs on-site through pull out programs, depending on the need of specific students.

The following is the ELL program eligibility criteria:

- Registration forms including home language surveys given to every student will include the SDE's mandatory questions to identify possible ELL students.
- Any student with a home language survey indicating a dominant language other than/in addition to English will be given the WAPT screener by a yearly-certified WAPT proctor within 30 days of registration.
- If the student tests Limited English Proficient (LEP) on the WIDA ACCESS or WAPT test an annual parent notification letter will go home to the parents/guardians indicating that their child was identified as needing specific English language services support.
- If the parent requests to waive English language services for their child (which must be done yearly), the student will receive classroom support in acquiring English through high-quality language instruction with their classroom teacher. Possible support includes the following:
    - Formative assessments of phonological processing, letter knowledge, and word and text reading.
    - Focused, intensive small-group reading interventions for at-risk students that include phonological awareness, phonics, reading fluency, vocabulary, and comprehension.
    - High-quality vocabulary instruction throughout the school day with essential content words taught in-depth.
- Regardless If the parent waives English language services, the English Learner is still required to take the state English Language ACCESS assessment.

The Language Instruction Educational Program will incorporate academic language development strategies within the general education classroom. The strategies will specifically support English acquisition. Teachers will receive on-going professional development in specific language development strategies, such as guided conversation frames and using Thinking Maps. Staff will learn processes for identifying and teaching Tier 2 academic vocabulary (words that are academic in nature but transferable in context), which helps all students acquire new vocabulary. Teachers will also learn how to use manipulatives (including iconic and symbolic representations) as a language support for math, reading, writing, and science. ELL programs, like the Guided Language Acquisition Design (GLAD) model and the Sheltered Instructional Observation Protocol (SIOP), will help inform staff development for lesson planning, delivery, and assessment.

The ACCESS test (Annual Summative Assessment for English Language Proficiency) for all identified English Learners will take place during the spring of each school year. Based on the student's English proficiency score in the spring ACCESS assessment, students will continue in the ELL program for the following year or be redesignated as exited. Redesignation criteria for 2019-2020 is score of 4 in each domain with an overall score of 5. Starting in 2020-2021 school year the redesignation criteria will change to a score in every domain of 3.5 (except speaking score of 1) with an overall composite score of 4.2. Exited students will be monitored for 4 years.

Staffing and Professional Development Plan

Small class sizes, multi-age classrooms, inclusion model services, learning outside of the classroom and the integration of content areas are all part of the EL Education model. Classes are capped at 22-28 students and in 6th-8th grade class sizes vary as students move between content areas, but teachers' crews have 28 or fewer students. At expansion, Anser will employ three full-time special education teachers, a reading interventionist and approximately 6 paraprofessionals to provide services in the classroom whenever possible. Learning outside of the classroom involves our Adventure Coordinator, Electives teachers and Community Based Curriculum Instructors, who work with parents and community partners to offer unique, community based opportunities to explore the arts, service, adventure and more. These instructors also serve as our specials teachers in Art, STEM, PE and Adventure.

Anser has a rigorous hiring process that has garnered excellent results. Positions are advertised nationally on the EL Education website, Idaho Schools and Anser websites, on social media and are posted at the local universities. Anser accepts applications to its hiring pool year round, and contacts all interested applicants when positions are available. Typically, Anser has approximately 20 applicants per opening. A screening committee of teachers and the ED reviews applications, and selects applicants to do an interview with the committee. Three to four applicants per opening move forward in the process.

Each is interviewed by a team that includes a parent, board member, student representatives, the ED and teachers. Applicants teach a lesson, interview directly with students and write a reflection after the lesson. During expansion, Anser will begin advertising in September 2020 and take additional steps to recruit by attending Teacher job fairs, advertising on LinkedIn and the Idaho Hispanic Chamber of Commerce job site.

Training in EL Education practices is critical to ensuring high quality implementation. Anser builds 14 days of professional development (PD) into its calendar to provide collaboration and learning among all

teaching staff. Additionally, new staff attend a two day "EL 101" training and monthly Mentor classes during their first two years at Anser. Staff also have the opportunity to attend the EL Education National Conference and site seminars. During expansion, existing Anser teachers will be paid to document their Expedition curriculum and serve as mentor teachers. An Assistant Education Director (AED) will be hired in July 2020 to assist the ED with hiring and with developing intensive training for a larger volume of new staff. An Instructional Guide (IG) will be hired in July 2021 to assist with the organization of curriculum materials and training. Anser's Professional Development work is founded on the same shared leadership model of the school. Teachers, in collaboration with the Education Director are, developing the topics and training, and more often than not teachers lead the training. This aligns with our value of Crew: that all staff have opportunities and are encouraged to develop their leadership skills, and to share their unique talents to strengthen the work of the group. See the 2019-202 Anser Work Plan (Appendix F3)

Section II: Financial and Facilities Plans

Fiscal Philosophy and Spending Priorities

The Board intends to maintain the fiscally conservative approach that has supported the successful operation of Anser Charter School for twenty years. Setting spending priorities is essential to operating successfully within funding limitations. The Board understands that investing in passionate, highly trained, professional educators is key to the success of the organization and is also the single largest budget item for the school. As facility costs represent the largest long-term fixed cost for the school, the Board recognizes that managing this expenditure effectively is critical to the financial health of the organization. In addition to acquisition costs, the Board is committed to providing funding for adequate maintenance and planned improvements to ensure the facility remains safe and suitable for the school's educational programs.

There are a number of items that are prioritized within the Anser budget in support of the unique characteristics of being an EL Education school:

- A contract with EL Education which provides rich, and EL specific teacher training, assessment of Anser's implementation of the EL Education model and support and professional development for the administrative leaders of the school.
- Funds for adventure trips and equipment for students, in support of providing exemplary Adventure opportunities within our EL Framework.
- Teacher managed budgets for use in purchasing Expedition specific content or supplies, hiring community experts, and doing fieldwork related to the Expedition are critical to providing immersive, and engaging opportunities for students at every grade level.

- Funds to support recruiting and serving a diverse student population including a Community Engagement Coordinator, adding transportation and an increased marketing budget.

One area where required funding may be lower for Anser is related to curriculum. Anser does purchase Math curriculum, but most of the remaining content areas are teacher developed to align to the Expedition. As such Anser does not budget a large amount for curriculum.

Finally, the creation and funding of strategic reserve accounts is a method that has been used successfully by the Board to create financial stability and provide funding for larger strategic expenditures. Funding reserve accounts will be a priority as Anser reaches maximum enrollment targets and begins generating excess funds.

Transportation

For Anser's first 21 years, transportation was not offered as a part of the school program. But with plans for expansion, the Anser Board of Directors is dedicated to providing transportation options that will support more equitable access to the school and will begin providing transportation in the 2020-2021 school year for students residing within its primary attendance area. This is one area of improvement to our school model that is made possible through expansion. Based on a proposal developed by a local bus company, the initial launch of student busing program would include up to 5 routes serving the greater Boise School District, which is Anser's primary attendance area. Busses would run morning and afternoon, with no mid-day Kindergarten service. Idaho State Dept. of Education reimburses 65% - 75% based on mileage and ridership. (See Appendix A- Budget)

5 Routes within Boise School District Boundaries	$175,000
Reimbursement from Dept. of Education (65% or higher) based on mileage and ridership	$ 113,750
Expense from Anser Operations Budget	$ 61,250

In the beginning of the school year, a staff coordinator would spend an estimated 15 hours/week to promote ridership, communicate with parents and the transportation (bus) company, adjust routes, etc. As the program matures, an average of 5 hours of staff time per week should be anticipated.
The board of directors may approve additional transportation services, under its discretion, if fiscally viable under school budget, based on ridership data and finances. Each year the transportation plan will be evaluated for efficiency, based on the location of Anser's currently enrolled families. Transportation for students with special needs will be provided in accordance with the requirements of state and

federal law. The service may be contracted following the transportation bidding process as per Idaho Code. Dedicated bus parking and loading areas will be developed during 2020-2021 construction.

Food Service Plans

The Anser of Idaho Board and the school leaders of Anser Charter School have 10 years of experience of offering and managing a successful federally supported free and reduced lunch program. Anser's Food Service Program has been through three successful review cycles, in which its nutrition standards were commended. The program has grown to operate with a small profit, which is invested back into the lunch program through offering additional fresh fruits and vegetables and vegetable tasting days where students can try new foods with which they may not be familiar. With the goal of ensuring that barriers to attending our school are eliminated, and that children are prepared to learn, Anser will offer a federally supported free and reduced breakfast in addition to the lunch program beginning in the 2021-2022. During the 2020-2021 Anser Charter School will update its annual NSLP renewal application to include offering breakfast, and will relocate and enlarge its kitchen to accommodate a larger student body and the service of both lunch and breakfast. Additional staffing is included in the budget to prepare breakfast, lunch and to serve more students. Building upon its record of successful food service and analysis of expected costs and reimbursements will ensure that Anser 's food service program will remain revenue neutral. The lunch program expenditures and revenues included in the budget are based directly on the current food service program at Anser.

Financial Management and Monitoring Plan

Anser Charter School has developed a comprehensive Financial Management and Monitoring system that involves the Fiscal Manager, Organization Director, Education Director, the Finance Committee of the Board and the Board of Directors itself in ensuring the proper use of public funds in accordance with law and public notice requirements and that ensures the financial health of the organization.
Anser employs a Fiscal Manager who reports to the Organization Director. The current Fiscal Manager, who holds a CPA, manages all financial aspects of the school. The Fiscal Manager's job duties include:

FISCAL OVERSIGHT:

- Track day to day finances ensuring adherence to approved budget
- Monitor expenses of ongoing projects and grant expenditures
- Prepare grant reports per grantor requirements
- Ensure that the accounting procedures used by Anser meet all federal, state, and local requirements

- Continue to look
  for and/or
  recommend ways to become more efficient and save the school money
- Provide financial oversight of the school food services program, including tracking expenditures, ensuring budgetary compliance, program projections, filing reimbursement claims, federal and state reports
- In collaboration with the Organization Director, maintain a risk management program including recommending and securing proper levels of insurance coverage and appraisal documents.
- Implement new accounting procedures promulgated by state and federal agencies.

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.
- Present annual budget for input and development as part of the annual budget process.
- Attend monthly board meetings.

STATE REPORTS

- Prepare the budget in conjunction with the Organization Director and submit all budget reports to SDE, lenders
- Publish Budget Summary in newspaper.
- Submit Annual Report and audit to the SDE, lenders.
- Publish Annual Financial Report in newspaper.
- Submit Grant Reimbursement Requests (monthly and/or quarterly)
- Prepare IDEA Part B reports and reimbursement requests as requested by authorizer.
- Prepare Building Maintenance Report.
- Prepare selected ISEE reports.

PAYROLL/PERSONNEL:

- Oversee a payroll system meeting all federal, state, and local requirements.
- Keep all employee payroll files accurate and up to date.
- Enter employee/company information into the Payroll System including Employee status, pay, and withholdings.
- Enter payroll transactions into the Payroll System, PERSI transmittal system, and PERSI funding transfer system as required and in a timely manner for each payroll.
- Responsible for completing payroll by the 25th of each month.
- Responsible for all reviewing and assuring the accuracy and timely submission of the payroll reports and taxes payable (Quarterly, W-2's, PERSI, Payroll Taxes etc.) by the payroll processor.
- Maintain payroll reports for audit

- Manage employee time-cards ensuring adherence to staffing projections/budget.
- Post all employee leave and absences on a monthly basis.
- Review W-2's and make sure they are distributed in a timely manner.
- Maintain personnel files for classified employees.
- Initiate and maintain initial hiring records, i9s and fingerprinting records.
- Handle all matters and maintain all records related to insurance and PERSI.
- Process paperwork relating to Worker's Compensation.

ACCOUNTS PAYABLE/RECEIVABLE:

- Oversee the collection of all revenues, monitor the cash flow of all funds, and invest excess funds in accordance with Board policy and state statutes.
- Responsible for deposits and keeping accurate monthly bank reconciliations.
- Make sure that all budget accounts are in adherence with State requirements.
- Insure segregation of duties procedures are implemented.
- Complete all sales tax reporting.
- Handle accounts payable in a responsible and timely manner.
- Create payment and tax statements for AAYC.
- Write checks and pay bills as requested /needed, and on at least on a weekly basis.
- Keep proper documentation for bills that are paid.
- Keep up to date and accurate vendor files
- Make sure that w-9's are on file for all vendors.
- Prepare and review 1099s in a timely manner.

FUNDRAISING:

- Ensure timely collection of all pledges and donations by maintaining current account holder information.
- Create fundraising collection reports and projections for use by the Organization Director and the Anser Board.
- Create semi-annual statements for donors with on-going pledges.
- Prepare end of calendar year donation receipts for all donors.
- Assist with the financial processes related to the Anser Auction.

OTHER REPORTING:

- Develop all financial reporting, including but not limited to monthly Board financial reports, quarterly distribution of financial reports to administrators and teachers, and financial reports required by the State of Idaho.
- Complete Idaho Annual Report Form through the Idaho Secretary of State

- Post monthly financial information to the Anser website.
- Work in collaboration with the Organization Director to produce monthly ISEE reports.

AUDIT:

- Assist during fiscal and programmatic audit as needed.
- Prepare records needed for annual audit and make audit adjustments prior to audit.

The Anser Board of Directors has authorized the Organization Director and Education Director along with the President, Vice President and Treasurer to sign checks. All expenditures require pre-approval from one of the Directors, through a formal requisition process. All checks are signed by two parties, and if the expense is over $500 a board member must be one of those parties. Monthly bank reconciliation reports are provided to the Finance Committee for review and signature. Monthly Finance reports are developed for the Board of Directors.

The Anser Board of Directors guides the work of the Fiscal Manager and Organization Director by setting spending priorities based on the long term goals of the school. The Board has consistently prioritized maintaining adequate reserve fund balances to ensure the smooth operation of the school given any unforeseen events. The Board adopted a Fund Balance Policy consistent with GASB statement #54.

Description of Facility Needs and Plan

Anser purchased its current facility in 2009 and has over $2 million of equity in the 36,000 square foot property. With expansion in sight, additional adjacent property was purchased with cash in 2018. Anser plans to remodel and expand its current facility to serve more students in a more flexible, learner focused environment. Renovations will be made to create flexible classrooms that open to each other, collaborative teacher planning spaces, well-equipped rooms for art, STEM, adventure, and audio/visual creation studios, smaller classroom spaces for special education and small group instruction. Remodeling will begin in June 2020 and be completed by July 2021. Anser will be able to retain students on campus during the construction with the exception of Junior High students whose classrooms will be the first to be impacted. They will be served in modular classrooms or at a leased location during the 2020-2021 school year. The completed building will have approximately 58,000 square feet and will include Anser's existing Gym and will provide additional play space and parking.

Work has begun to develop building plans and to complete the required RFQ process to select a company to design and build the newly remodeled facility. (See Appendix F10). Anser is in conversation with multiple possible lenders, and due to the school's long and excellent credit history, anticipates that bond financing will provide favorable terms for financing the remodeling of the current facility and

acquired property. Anser budgets conservatively and is ensuring that facilities costs do not exceed 12% of the annual budget. Working with Building Hope, (Appendix 9) we have determined reasonable construction estimates for our project based on similar projects. We are confident our project will be completed within the financial constraints we have set.

Section III: Board Capacity and Governance Structure

Governance Structure

The Anser Community Board refers to the Board of Directors of Anser of Idaho Incorporated, a non-profit organization formed under the Internal Revenue Code section 501(C)3 and acts in accordance with the Anser By-Laws, which can be viewed in Appendix B. The Anser Community Board is charged with the governance of the school, the oversight and evaluation of the school's Co- Directors, and ensuring the Mission and Vision of the school are being realized. Board members bring important skills to the governance of the school. The key areas of expertise sought in members of the Anser Community Board include: Finance/Accounting, Capital/Fundraising, Governance, Organizational Leadership, Law, Construction/Facilities and Non-Profit/Service. The Anser of Idaho Board shall be comprised of no more than 15 voting members, with a goal of reaching 50% of members being outside community members with no students enrolled at the school. The Anser Community Board elect's members to a three-year term. Members may be elected by the Anser Community Board for additional terms. The Anser Community Board includes:

One (1) parent representative from the Family Council, elected by the Family Council.
Two (2) at-large parents, elected by the parent body.
The Immediate Past President of the Board.
Other directors as elected by a majority vote of the Board at the annual meeting.

Non-voting Staff Advisers to the Board include:
At least one teacher
Administrative staff as designated by the Board

The Anser Community Board shall manage and oversee the fiscal and legal responsibilities of the school and charter obligations, considering but not limited to: Finance, Budget Development and Debt Obligation, Contracts and Salaries, Policy Development and Review, Employment, Strategic Planning, Authorizer Relations, Performance Certificate Requirements, and Statutory Requirements.

CORPORATE OFFICERS

The officers of the Corporation shall be: President, Vice-President(s), and Treasurer. The immediate Past President shall serve as an ex officio member of the Executive Committee. An administrator of the school, who serves as an ex officio member of the Board, shall be designated by the Board as the Secretary of the Corporation.

Duties of the Corporate Officers:

President: The President shall preside at all meetings of the Board where he/she is present. He/she shall have the responsibility of oversight of the management of the business of the Corporation and shall see that all orders and resolutions of the Board are carried into effect. He/she may be one of the officers authorized to sign checks and drafts of the organization The President shall, with the consent of two-thirds of the full Board, hire an administrator who shall act as administrator of the Corporation under the direction, management and control of the President, Executive Committee, and the Board. He/she will in general perform all duties as may be prescribed by the Board.

Vice-President. The duties of Vice-President will be to act in the capacity of the President in the event of the absence or inability of the President to exercise his/her office. He/she may be one of the officers authorized to sign checks and drafts of the organization.

Secretary: The Secretary of the Corporation shall attend all meetings of the Board, record all votes and the minutes of the meetings, and maintain the minutes in a book to be kept for that purpose. He/she shall give or cause to be given notice of all meetings of the Board and special meetings of the Board as required by law and shall perform such other duties as may be prescribed by the Board. The Secretary shall be the official custodian of all records of the Corporation.

Treasurer: The Treasurer shall oversee the work of the accounting staff to assure that full and accurate accounting is made of all funds belonging to the Corporation. He/she shall render to the President and members at the regular meetings of the Board, or whenever they may require it, an account of all transactions and of the financial condition of the Corporation. He/she may be one of the officers authorized to sign checks and drafts of the organization.

Immediate Past President: The Immediate Past President shall serve as an ex officio member of the executive committee providing guidance on policy and past practices of the Board. The term of the immediate past president will be one (1) year after completion of their term as president with the option of an additional year if approved by the executive committee and the Board. The immediate past president shall be a full member of the Anser Community Board.

Anser Community Board Committees:
The Anser Community Board shall establish such standing committees as the Board deems important to the efficient, effective operation of the school and shall appoint Board representatives to such standing Committees.

Executive Committee: The Board may appoint an Executive Committee comprised of the officers elected from the Board. Except for the power to amend the Articles of Incorporation and By-Laws, the Executive Committee shall have authority to transact the business of the Board for all actions delegated to it by the Board.

Finance Committee: The Board may appoint a Finance Committee to ensure effective financial guidance and oversight of appropriate internal controls, responsible fiscal management and to implement budget processes and communication to the Board.

Governance Committee: The Board may appoint a Governance Committee to ensure that Anser complies with applicable regulations and that the Anser Board serves as a model of school governance with a clear communication structure, processes, protocols, and Board training.

Continuous Improvement Committee: The Board may appoint a Continuous Improvement Committee (formerly the Education Committee) to promote, support and evaluate the school's academic and character goals and ensure Board understanding of the school's performance.

Resource Development Committee: The Board may appoint a Resource Development Committee to construct the optimum working relationship between the Board, the school's organizations and the Anser community through support of fundraising efforts and special initiatives identified by the Anser Community Board.

Family Council: The purpose of the Family Council shall be to provide parent input into school policies and procedures, provide an impartial voice to staff and the Board on concerns parents bring to them, conduct activities for parent education and school involvement for families, and link families to activities and volunteer opportunities within the Anser community. The Family Council shall be comprised of at least ten (10) members elected by and from the parent body each May. The Family Council also elects a Family Council member to serve as a Board member.

Diversity, Equity and Inclusion (DEI) Committee

The DEI Committee is an advisory sub-committee to the Community Board. It is comprised of volunteer members from the Boise community and provides guidance to the Anser Board in the following areas:

- To identify and implement recruiting strategies that are designed to reach underserved communities
- To develop family engagement practices that will ensure high levels of matriculation among underserved families who are offered enrollment
- To provide training to the Anser Community Board and staff on Diversity, Equity and Inclusion related topics.

Board Composition and Succession

The Anser Board consists of nine- to fifteen members. The 2019-2020 Anser Community Board consists of the following members. Please see Appendix C for the resumes of all current Board members. A staggered succession of board members and officers is in place as outlined in the table below.

Position	Name	Years of Anser Board Service	Current term end date
President	Nichoel Baird Spencer	7	June 2020
Vice President	Caitlyn Scales	2	June 2021
Treasurer	Maridee Lemieux	7	June 2022
Immediate Past President	Lora Breen	8	June 2021
	Leslie Brown	5	June 2020
	Amy York	1	June 2023
	Kristin Reed	0	June 2023
	Jeff Tonkin	1	June 2022
	Maggie Chase	6	June 2020
	Staci Shaw	4	June 2021
	AnnMarie Johnson	1	2022

Parent at Large	John Townsend	0	2022
Organization Director/Board Clerk (Staff Adviser)	Heather Dennis	10	ongoing
Education Director (Staff Adviser)	Michelle Dunstan	6	ongoing
Family Council Representative	Amy York	2	June 2020
Teacher Liaison (Staff Advisor)	Nancy Tacke	2	June 2020

Board Member Recruitment and Training

Board Member recruitment and training is the responsibility of the Executive Committee and the Governance Committee of the Anser Community Board. The Governance Committee shall each year review the skill set of the current board members and work to recruit new board members to fill any existing gaps, or gaps created at the end of the member's term. Additional consideration will be made to recruit board members to ensure a balance of members that are community members and not Anser parents, and to represent stakeholders within the Treasure Valley community that may be under represented within the Anser Community Board.

New Board member training includes instruction on using the board portal, review of an archive of documents that includes but is not limited to the Charter Petition, By-Laws, the Articles of Incorporation, the Mission and Vision statements, financial policies and procedures, Idaho school finance and readings on the proper role and function of a charter school board.

Annually all board members receive training in order to be able to effectively review and evaluate all financial reports, student achievement data, and the goals of the Continuous Improvement plan. Through a Board Retreat process board members receive training on the difference between governance and management, the role of the board and the administrators, and additional training related to current efforts of the Board and or of the school.

Section IV:
Student Demand and Primary Attendance Area

Primary Attendance Area

Anser's Primary Attendance Area is the Boise School District. The boundaries of our primary attendance area will change in conjunction with the Boise School District if in the future they make changes to their district boundaries. Anser gives priority lottery preference to students who reside within the Boise School District.

As of 2018-2019 Anser's student population, which includes students from all zip codes across the Boise area is distributed as shown in the chart below:

Zip Code	% Anser Student Population
83703	20.65%
83704	17.93%
83702	17.39%
83705	11.14%
83714	10.60%
Other Combined	22.28%

Anser's intention during expansion is to stay in its current location in Garden City. Lottery applications received over the last three years show a pattern of interest consistent with current enrollment. In order to shift enrollment patterns to attract more underserved students, Anser will undertake steps outlined in the Student Demand Section to mirror Boise School District demographics within 10% for new kindergarten enrollment in the 2020-2021 school year and in each class and year added during the course of expansion.

Within this three-mile radius are many school district schools serving a high percentage of low income families including Koelsch, Whittier, Taft, Mountain View and Valley View and Morley Nelson. Anser is located outside the core area of downtown, but with proximity to the Connector, the Greenbelt, and

easy access from both Chinden and State street. This makes the school easy for families who work in many areas of the city to drop off students on their way to work if they choose not to take advantage of bussing.

Student Demand

Demand for schools of choice in the Boise area continues to grow, and according to the ECONorthwest study ("Idaho Charter School Growth Opportunities" May 2019) (Appendix F8) there will be an opportunity to fill an additional 1000-2000 charter school seats in the Boise area by 2024 to meet demand, based on population growth in the city.

An additional ECONorthwest (Appendix F8) study shows that some of the highest levels of opportunity for charter growth in Boise are in the very areas that Anser would be focused on, within 3 miles of the current location. In particular, there is a high level of growth opportunity in the area around Mountain View school.

As can be seen in the zip code chart, the current geographic distribution of Anser families demonstrates that Anser has built a reputation of quality that drives high levels of lottery applications within the target areas that have some of the highest charter opportunity growth. While Anser's primary attendance is the whole Boise School District, the focus area for targeting additional recruiting resources will be within that 3-mile radius.

Anser currently serves 374 students in K-8. Each year more than 400 students are entered into the Anser lottery for a typical 40 openings. This disappoints nearly 90% of the families seeking Anser's model. It becomes difficult to shift the demographics of our school appreciably given the small chance that underserved families recruited by the school will be able to gain admission. Expansion allows Anser to address both issues. Expansion plans target growth at the lower grades where the waiting list is extensive, allowing us to grow from the ground up from the current 374 in 2020-2021 to 672 K-8 students in 2026-2027 as outlined in the Enrollment Capacity Section

This strategic expansion capitalizes on our current waiting list, but will also include extensive outreach to the broader community and underserved communities to ensure a more diverse and equitable student body. Anser has begun an intensive process to audit current practices that may create barriers for some families and also to improve upon current school and recruiting practices to be more effective in reaching more underserved students. The addition of breakfast to Anser's Food Service program and provision of transportation between home and school will increase the viability of attendance at the school for low income and ELL students. Additionally, during the 2019-2020 school year a Community Relations and Engagement position was created. By investing in this position, Anser is dedicating

significant funding and personnel to initiating new and more intensive recruiting efforts. Recruiting efforts will include hosting events at local libraries, reaching out through churches, synagogues and mosques and local preschools serving low income families to families with young children. We plan to attend the "Picnic in the Park" free lunch service at area parks and increase our media outreach through Spanish language radio, neighborhood associations and other groups with ties to local communities. Anser's Diversity, Equity and Inclusion Advisory Committee will vet Anser's recruitment plan to ensure the plans are equitable and will reach the underserved groups intended.

Anser Current and Expected Student Population and local District Demographics

Anser's Community Relations and Engagement Coordinator position will work in conjunction with Anser's Diversity Equity and Inclusion (DEI) committee to identify and implement recruiting strategies to reach underserved communities and develop family engagement practices that will ensure high levels of matriculation among underserved families who are offered enrollment. This investment will help the school attain these demographic goals by the 5th year of expansion.

	WH%	AM %	AS %	BL %	H %	HO %	M %	Female %	Male %	Free/reduced lunch%	SPED %	ELL %
BOISE Ind.	74.68	0.52	4.00	4.17	12.68	0.54	3.41	48.74	52.45	50	12.50	10.00
Anser Projected	72.09	0.50	3.00	4.99	14.92	0.50	4.00	50.00	50.00	45.00	13.00	6.00
Anser Current	83.90	0.50	1.40	0.50	10.40	0.10	3.60	51.40	48.60	24.00	10.00	0.10

Intended student Population upon full expansion

Enrollment Capacity

Anser has 20 years of experience with managing student enrollment, and understanding the impact student enrollment has on funding. The budget presented (See Appendixes A1-A4) is based on a conservative and moderate expansion. In 2009, Anser expanded from 190 students to 365 students. Our planned expansion, which is similar in proportion is based on our experience in how to bring new families into the culture of our school. In 2021-2022 Anser will add one class at K and 1. We will add two classes of our 2nd-3rd grade combined and 1 class of 4th-5th grade combined. In 2022-2023 we will add one more 2nd-3rd grade combined class and 2 more 4th-5th grade classes. This allows us to bring up the 4th graders from the classes below to fill some of the openings in 2022-2023, limiting the number of students we are recruiting at the upper grade levels. From that point forward, all growth is based on the larger number of students advancing to the next grade level. This growth is outlined in the chart below:

Maximum Enrollment						
	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
K	37	67	67	67	67	67
1	37	75	75	75	75	75
2	37	65	81	81	81	81
3	37	65	81	81	81	81
4	38	52	81	81	81	81
5	39	52	81	81	81	81
6	52	52	52	81	81	81
7	60	60	62	65	81	81
8	58	58	60	62	70	81
Total	395	546	640	674	698	709

Class sizes in this Operational Model range from 22-28 students. 6th-8th grade classes are content based, so some periods may be higher or lower than 28 at full enrollment based on student choice of courses, and student needs.

Anser will enroll students using an equitable lottery process as outlined in Idaho Code 33-5206 and will include the preference categories listed therein, including: Founders/Staff, not to exceed 10% of the enrollment capacity of the school, siblings of students already selected by the lottery, and to those students who reside within the primary attendance area. The maximum number of students who may be enrolled in the school shall be 709 students. Annually, no less than two (2) months prior to the Anser of Idaho, Inc. lottery application deadline, the Board of Directors will establish, at its regularly scheduled

meeting, by motion and vote, an 'Annual Enrollment Capacity' for each grade level (K-8), not to exceed the maximum enrollment number (709). Each year, the Administration will: (1) Recommend annual enrollment capacity numbers by grade to the Board. (2) Post the Annual Enrollment Capacity information on the school's website within five (5) days of the Board vote; and (3) conduct the lottery and enrollment process in compliance with the limits established in the Board's Annual Enrollment Capacity motion and vote.

Anser is planning to apply for the CSP (Charter Start Program) grant and is a Bluum Partner School and as such will be making a support request to the J.A. and Kathryn Albertson Family Foundation(JKAFF). Anser will be seeking additional grant funding. All of these sources of funding will support the expenses related to growth, including supplies, furniture, and hiring key staff (Assistant Education Director, Instructional Guide, additional administrative support. In the unlikely event that Anser did not receive funds from JKAFF, the early hiring of staff and front loaded purchase of supplies and furniture would be reduced to ensure a break even budget.

Community Partnerships and Local Support

Anser has local, community and political support for expansion and extensive connections within the refugee community including connections with local refugee business owners and agencies such as the Agency for New Americans. Through 20 years of student service in the community, Anser also has connections with Genesis Community Health, Lolly Wyatt Head Start, Giraffe Laugh, The Idaho Foodbank, Boys and Girls Club, the Garden City Library and Boise Bike Project, Idaho Humane Society, Boise Rock School, Corpus Christi House, Special Olympics and the Idaho Human Rights Education Network. Anser has letters of support for expansion from some of these groups and also from Mayor Evans of Garden City where the school is located (Appendix F12).

Anser has been including its current parents in expansion planning through newsletters, parent and student feedback committee, parent feedback nights, Coffee Talks with the school administrators and engaging its Family Council members in the annual Board Retreat process to ensure they are informed and have opportunities for input in planning the future of the school.

Enrolling Underserved Families

Planned recruitment moves include offering activities for students at local school fairs, at library branches and at the locations of the Idaho Foodbank "Picnic in the Park" free summer meal program. Anser has local, community and political support for expansion and extensive connections within the refugee community including connections with local refugee business owners and agencies such as the Agency for New Americans. Through 20 years of student service in the community, Anser also has

connections with the
many local community
groups as listed above that will support our efforts to enroll underserved families. The Community Relations and Engagement Coordinator will leverage these community partners to build these connections to develop relationships with the families served by these programs to build trust in and excitement about the school.

Anser's website explains the enrollment process in Spanish and includes a Spanish Language lottery application. Anser will add Spanish radio station marketing to its current radio marketing efforts in addition to grow its Latinx population. Historically underserved students accept offers of attendance at charter schools at lower rates than other students [6]. The Community Relations and Engagement Coordinator will work to address this by organizing parent meet-ups, scheduling translation services for completing enrollment processes, working with the social worker to connect families with community resources, and to ensure families understand transportation, meal options and important school events.

Section V: School Leadership and Management

Leadership Roles

Anser Charter School was founded with, and continues to operate under, a shared leadership model. (Appendix D) The Co-Directors of the school are the Education Director and the Organization Director, who serve under the direction of the Anser of Idaho Board of Directors. The Education Director fulfills the role of the Principal and is the educational leader of the school. The Education Director supervises all certified personnel and is responsible for managing all educational aspects of the school. The Education Director oversees the Special Education program, coordinates state assessments, and manages the contract and works with the staff of the EL Education network to implement the EL model within the school. The Education Director works collaboratively with the teaching staff to develop plans for professional development, areas of focus for continuous improvement of instructional practices, to evaluate, implement and create curriculum aligned to the EL Education model of the school, to train new staff, and to educate families about the mission of the school and their role in the success of the school.

The Organization Director is responsible for the oversight of all non-education related aspects of the school, such as: corporate administration, fiscal management, fundraising, human resource

administration, state
reporting, governance
support, authorizer relations, enrollment, marketing and community relations, lunch program, transportation and paid program oversight, technology and IT contractors, E-Rate and facility management and development. The Job Descriptions for both positions are included in (Appendix F11).

During Anser's expansion we will create a number of positions that were not financially feasible at our smaller school size or without additional grant funding from J.A. and Kathryn Albertson Family Foundation upon expansion, but become financially sustainable in year three. They will be critical to Anser providing a rigorous, inclusive educational program that meets the needs of all students. With a

larger student body, there will no doubt be a need for additional special services. A dedicated position to manage these services, a Special Education/Federal Programs Director, will be critical to meeting the needs of all learners. The creation of an Assistant Education Director position to assist with processing discipline issues with students, completing observations of teachers, training and supporting new staff members and assisting the Education Director with the development and implementation of the Professional Development Work Plan and Individualized Professional Development plans for staff within their first three years of teaching will ensure that our staff is well trained and well supported in order to provide a high quality experience to students.

Qualities Expected of the Co-Directors

The Anser of Idaho Board of Directors made a decision in 2004 to move from having one Administrator with responsibility for management of all aspects of the school to a Co- Director model. This is a model that has been adopted in various forms by many charter schools that have since been founded in Idaho. The Anser of Idaho Board of Directors recognized that the qualities and competencies of an education professional and a business professional are vastly different. With the move to a Co-Director model, the Education Director is able to focus all efforts on the education of children, while the Organization Director can ensure the sound management of all other areas of the school.

The Anser of Idaho Board of Directors expects the Education Director to possess teaching and leadership experience within the EL Education model and an understanding of and experience working in a shared leadership model. The Education Director must have strong communication skills, understand how to build effective and collaborative learning communities and have experience with evaluating, coaching and mentoring staff. The Education Director must have knowledge of effective instructional practices and the ability to coach and mentor educators to become highly effective practitioners. The Education Director must understand the importance of student and parent voice in creating a school community that values equity, partnership, and innovation and the ability to build the trust that is needed for all

families to engage
deeply in the life of the
school. The Education Director should have a relentless focus on what is best for children and be a passionate advocate and communicator about the Anser mission.

The Anser of Idaho Board of Directors expects the Organization Director to be a self-starter and multi-tasker with the flexibility and willingness to align with the school's philosophy and culture. A strategic thinker, this individual will be highly skilled in working collaboratively with staff and volunteers, be willing to assist wherever they are needed, possess a keen financial sense, have experience in managing staff, and engage in shared leadership with the Education Director, Anser of Idaho Board, Anser staff and parents to advance Anser's Mission and Vision. The Organization Director should be dedicated to the continuous improvement of all aspects of the areas under their management, committed to the best use of public funds and all Anser resources, aware of and focused on compliance with all state and federal laws that pertain to education institutions.

The Roles of the Board of Directors and the Co-Directors

The Board of Directors and the school administrators work collaboratively to lead the school. The board provides governance, financial and policy oversight, and supervises and evaluates the Co-Directors. Through collaboration with the Co-Directors, families, and staff, the Board sets the long term vision for the school and assesses the staff's success in implementing that vision. The Co-Directors hire, evaluate and manage all staff, ensure the effective implementation of board policy, and with input from families and staff, ensure the board vision for the school is realized.

Evaluating the Co-Directors

The Board of Directors shall oversee ongoing support of and annual evaluation of the Co-Directors. The Board shall authorize the Continuous Improvement Committee, which includes members who have received training on the Danielson framework to annually evaluate the Education Director using the state approved framework (currently the Idaho Principal Evaluation Framework) per Idaho code. The CIC also seeks input from teaching staff and uses a survey that is sent to all board members. The scores and comments are aggregated by sub group (i.e. board members or staff) and shared with the Education Director who also completes a self-reflection. The Education Director, the Board President and the Continuous Improvement Committee Chair meet with the ED to share results and work together to develop goals that will guide the ED's work for the next year, and they schedule regular meetings to review progress on the goals.

The Governance
Committee of the Board
of Directors is responsible for implementing the evaluation of the Organization Director. The evaluation uses a survey that is sent to all board members, and all of the staff of the organization. The scores and comments are aggregated by sub group (i.e. board members or staff) and shared with the Organization Director who also completes a self-reflection. The Organization Director, the Board President and the Governance Committee Chair work together to develop goals that will guide the work of the Organization Director for the next two years, and they schedule regular meetings to review progress on the goals.

The ED, Michelle Dunstan, has been with Anser for 12 years as a teacher and Education Director. She supervises all certified personnel and is responsible for managing all educational aspects of the school. She supports students and families through discipline issues, oversees the Special Education program, coordinates state assessments, and is the liaison to the EL Education network. The ED works collaboratively with the teaching staff to develop PD plans, to identify areas for continuous improvement, to analyze data, and to evaluate curriculum. With staff support, the ED trains new staff,

and educates families about the mission of the school and their role in the success of the school. The OD, Heather Dennis has also been on staff for 10 years and also served as a Board Member and Family Council member during her 14 years as a parent at the school. The OD is responsible for the oversight of all non-education related aspects of the school, such as: corporate administration, fiscal management, fundraising, human resource administration, compliance and legal matters, state reporting, governance support, authorizer relations, enrollment, marketing and community relations, lunch program, transportation and paid program oversight, technology and IT contractors, E-Rate and facility management and development. The resumes of both Directors can be found in (Appendix D1)

During expansion we anticipate certain operational challenges and have a plan to address them. As outlined above we will create a number of positions that were not financially feasible at our smaller school size or without additional grant funding from the JA and Kathryn Albertson Family Foundation; upon expansion they will become financially sustainable in year three. They will be critical to providing a rigorous, inclusive educational program that meets the needs of all students. With an increased student body, we anticipate increased needs for special services. A Special Education/Federal Programs Director will be critical to meeting the needs of all learners. We will create an Assistant Education Director position to support discipline issues with students, completing observations of teachers, training and supporting new staff and assisting the ED with professional development. This will help ensure that our staff is well trained and well supported to provide a high quality experience to students. An Instructional Guide will be added to assist teachers in implementing our model with fidelity, equity, and academic rigor, especially during initial expansion. Anser's school leaders have many years of experience

operating a highly effective school. In tandem with a high functioning board and a dedicated and well trained staff, they are committed and prepared to expand Anser's nationally recognized, whole -child, EL Education model to many new learners ready to be served in an equitable, future-ready school community.

References

[1] Dewey, J. (1938). *Experience and education.* New York: The Macmillan Company.
[2] Cousins, E. (Editor) (2000). *Roots: From Outward Bound to Expeditionary Learning.* Dubuque: Union-Hoermann Press.
[3] Kurt Hahn and the roots of Expeditionary Learning. http://www.americanradioworks.org/segments/kurt-hahn-expeditionary-learning/
[4] SEG Measurement (2018). *An Evaluation of the Effectiveness of Bridges in Mathematics in Developing Student Math Skills.*
[5] Mathematica Policy Research. (2013). *Evaluation of Expeditionary Learning Middle Schools.* InFOCUS Education Brief.
[6] Potter, H. (2019) *Recruiting and Enrolling a Diverse Student Body in Public Choice Schools: Strategies for School Leaders*.
[7] EL Education Core Practices: A Vision for Improving Schools

Appendix D: Public Charter School Closure Protocol

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

CLOSURE PROTOCOL

August 2013

Background

This Closure Protocol is aligned to Idaho statute and rule and is designed to reflect best practices for managing the school closure process in an organized manner that protects the state, students and the community.

The Idaho Public Charter School Commission Closure Protocol is based on the Colorado Charter School Sample Closure Framework released in 2011 and publicly available at www.charterschoolquality.org. The Colorado Sample Closure Framework was created through the collaborative work of the Colorado Department of Education, the Colorado League of Charter Schools, and the Colorado Charter School Institute.

The Colorado Charter School Sample Closure Framework incorporated information from the following sources:

1. *Accountability in Action: A Comprehensive Guide to Charter School Closure*. Edited by Kim Wechtenhiser, Andrew Wade, and Margaret Lin. National Association of Charter School Authorizers (2010).
2. Colorado Charter School Institute Closure Project Plan (2010).
3. *Charter Renewal*. Charter Schools Institute, The State University of New York (SUNY).
4. *Pre-Opening Checklist and Closing Checklist*. Office of Education Innovation, Office of the Mayor, City of Indianapolis.
5. *2010-2011 Charter Renewal Guidelines*. District of Columbia Public Charter School Board.

During the revision process, the following additional sources were integrated into the Idaho Public Charter School Commission Closure Protocol:

6. *Navigating the Closure Process*. Matthew Shaw. Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011).

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Introduction

Charter school closures happen when a school's charter is revoked, non-renewed, or relinquished. A number of factors can lead to closure of the school, including poor academic performance, finances, governance, or safety issues. Regardless of the reasons for closure, the board of directors of the public charter school is responsible for managing the closure and dissolution process.[2] Cooperation between the public charter school board and administrator, authorizer, and other state entities can allow for the facilitation of a smooth process that "minimize[s] disruption for students while ensuring that public funds are used appropriately."[3]

The closure process should begin as soon as the authorizer or the charter school board takes initial action to close the school, regardless of whether an appeals process has been completed or the decision has been finalized. This allows the school and authorizer to discuss the potential closure, identify a tentative timeline for the final decision, and work together to establish a closure team and clear paths of communication with each other, stakeholders, and the community.

Whenever possible, the authorizer and public charter school should work together to ensure that the school is able to operate through the completion of the regularly-scheduled school year. Under most circumstances, this should allow adequate time to complete all closure tasks. More importantly, it minimizes instructional gaps for students. However, there are occasions when it is necessary for a school to close mid-year. In these cases, students' educational transitions should be the highest priority. The school, authorizer, and other state entities must also identify the appropriate closure team and work closely together to prioritize closure tasks and manage their completion in as organized and efficient manner as possible.

Though individual schools should develop closure plans that are tailored to their situation, resources, and needs, all schools should keep the following primary goals in mind:

1. Providing educational services in accordance with the charter and performance certificate until the end of the school year, or the agreed upon date when instruction will stop.
2. Reassigning students to schools that meet their educational needs.
3. Addressing the school's financial, legal and reporting obligations.

The closure process has many tasks, which are illustrated in the chart below. Based on the circumstances surrounding the closure, not all tasks in this protocol may apply. When the charter school, authorizer, and other state entities meet at the outset of the closure process, they should refer to the Closure Protocol and identify which tasks will be required or necessary. During this meeting, responsible parties and completion dates should be agreed upon to ensure a transparent and smooth closure. The template that follows includes the basic tasks that will usually need to be addressed to close a school; the format allows for the insertion of responsible parties and task deadlines.

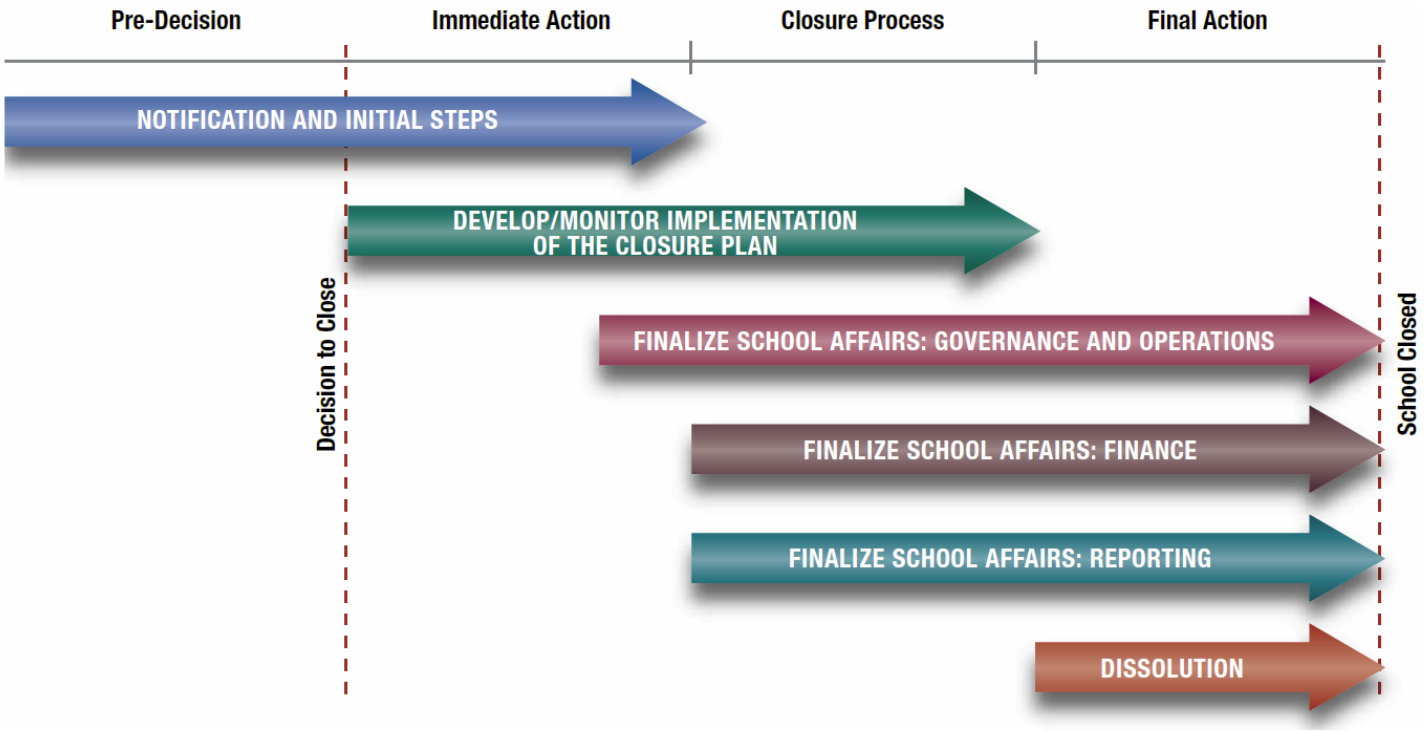
Endnotes

[1] Peyser, J. and Marino, M. "Why Good Authorizers Should Close Bad Schools." Accountability in Action: A Comprehensive Guide to Charter School Closure. National Association of Charter School Authorizers (2010). Pages 6 and 9.

[2] I.C. § 33-5212

[3] Shaw, M. "Navigating the Closure Process." Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011). Pages 2-3.

A Conceptual Timeline for Closure



Notification and Initial Steps

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Meet with PCSC and SDE staff Within 3 business days of the authorizer's or school's initial / intended closure decision, the charter school administrator and a representative of the school's board will meet (in-person or via telephone or web conference) with staff representatives of the PCSC and SDE to: **1.** Review the remaining process for finalizing the closure decision as applicable **2.** Review the Closure Protocol and tasks and clarify critical deadlines **3.** Identify points of contact for media or community questions **4.** Draft communication to staff, families, and affected districts	School, PCSC, SDE			
Notify Parents / Guardians of Potential Closure **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to enrolled families. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Assurance that instruction will continue through the end of the school year or an estimation of when instruction will cease. • Assurance that after a final decision is reached, parents/students will be notified and assisted in the reassignment process. • Public Charter School Closure FAQ. • Contact information for parents/guardians with questions.	School, PCSC			
Notify School Districts Materially Impacted **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to districts materially impacted by the closure decision. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Copy of the letter sent to parents. • Public Charter School Closure FAQ. • Contact information for questions.	School, PCSC			
Meet with Charter School Faculty and Staff Administrator and charter board chair meet with the faculty and staff to: **1.** Discuss reasons for closure, status of appeals process (if applicable), and likely timeline for a final decision. **2.** Emphasize importance of maintaining continuity of instruction through the end of the school year. **3.** Emphasize need to limit expenditures to necessities. **4.** Discuss plans for helping students find new schools and need for teachers and staff to have organized student files prepared for transfer. **5.** Identify date when last salary checks will be issued, when benefits terminate, and anticipated last day of work. **6.** Describe assistance, if any, that will be provided to faculty and staff to find new positions.	School			
Review and Report on Finances **1.** Review budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable. Communicate with the PCSC and SDE regarding financial status and next steps. **2.** Limit expenditures to only those in the approved budget and delay approving expenditures that might no longer be necessary until a revised budget is approved. **3.** Communicate with the SDE regarding whether there are any anticipated changes to remaining disbursements from the state.	School, PCSC, SDE			

Send Additional and Final Notifications **1.** Notify parents and affected school districts in writing after key events (e.g., denial of an appeal) and when the closure decision is final. **2.** The letters notifying staff, parents, and other districts of the final closure decision should include: • The last day of instruction. • Any end-of-the-year activities that are planned to make the transition easier for parents and students. • Assistance that will be provided to families in identifying new schools. This may include a list of school options; application deadlines or open house dates for traditional public, public charter, or private schools; or individual meetings with families. • Basic information about the process for access and transfer of student and personnel records.	School, PCSC			

Develop/Monitor Implementation of the Closure Plan

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Establish Transition Team, Develop Closure Plan, and Assign Roles **1.** Contact appropriate entities to establish a transition team, including: • A member of the PCSC staff • A member of the SDE staff • Charter school board chair • Lead administrator from the charter school • Lead finance person from the charter school • Additional members as deemed appropriate **2.** Develop plan, review roles of primary entities, identify individuals responsible for closure tasks, and exchange contact information.	School, PCSC, SDE			
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 and transfer of student records. **2.** Identification of long-term storage location of student and personnel records; plan for access and communication to parents regarding access. **3.** Notification to entities doing business with the school. **4.** The status of the school's finances, including outstanding expenses and payment of creditors and contractors. **5.** Sale, dissolution, or return of assets. **6.** Submission of all required reports and data to the authorizer and/or state.	School			
Submit Final Closure Report Submit the completed closure Protocol document and appropriate final closure documents to the PCSC (see the Reporting section for more details).	School			

Finalize School Affairs: Governance and Operations

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
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.	School			
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, 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.	School			
Notify Commercial Lenders / Bond Holders (if applicable) If the school has existing loans - Within 10 days after the final decision to close the charter school (after appeals process is complete), notify banks, bond holders, etc., of the school's closure and projected dates for the school's last payment towards its debt and if/when default will occur.	School			
Terminate EMO /CMO Agreement (if applicable) Review the management agreement and take steps needed to terminate the agreement at the end of the school year or prior to the intended closure date. **1.** The management company should be asked for a final invoice and accounting, including an accounting of any retained school funds and the status of grant funds. **2.** The school and the management company should agree upon how the company will continue to provide educational services until the last day of instruction. The school and the management company agree when other services including business services will end.	School			
Notify Contractors and Terminate Contracts **1.** Notify all contractors, including food service and transportation, 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.	School			
Notify Employees and Benefit Providers **1.** Whenever possible, provide employees with formal, written notification 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. WARN and COBRA) and eligibility for unemployment insurance pursuant to federal or state law or regulations of the Idaho Department of Labor. **2.** Notify benefit providers of pending termination of all employees, to include: • Medical, dental, vision plans. • Life insurance. • PERSI, 403(b), or other retirement plans **3.** Consult legal counsel as specific rules and regulations may apply to such programs.	School			

Finalize School Affairs: Governance and Operations (continued)

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain and Organize Records **1.** Maintain all corporate records related to: • Loans, bonds, mortgages and other financing. • Contracts. • Leases. • Assets and their sale, redistribution, etc. • Grants -- records relating to federal grants must be kept in accordance with 34 CFR 80.42. • Governance (minutes, bylaws, policies). • Accounting/audit, taxes and tax status, etc. • Employees (background checks, personnel files). • Employee benefit programs and benefits. • Any other items listed in the closure plan. **2.** Determine where records will be stored after dissolution.	School			
Transfer Student Records and Testing Material **1.** Ensure that all student records are organized and complete **2.** Within 10 days of receiving a records request, send student records, including final grades and evaluations, to the students' parent or new district and/or school, including: • Individual Education Programs (IEPs) and all records regarding special education and supplemental services. • Student health / immunization records. • Attendance record. • Any testing materials required to be maintained by the school. • Student transcripts and report cards. • All other student records. **3.** Document the transfer of records to include: • Date of transfer (for each individual student file transferred). • Signature and printed name of the charter school representative releasing the records. • Name and contact information of the receiver's representative. • The total number and percentage of general and special education records transferred.	School			
Inventory Assets and Prepare Federal Items for Pick-up **1.** Inventory school assets, and identify items: • Loaned from other entities. • Encumbered by the terms of a contingent gift, grant or donation, or a security interest. • Belonging to the EMO/CMO, if applicable, or other contractors. • Purchased with federal grants or funds (i.e. Charter Start grant) ➢ Items purchased with federal funds should be listed on the Federal Items Inventory spreadsheet provided by the PCSC. The list should be very detailed and complete, and items should not be sold or re-distributed. **2.** Return assets not belonging to school where appropriate documentation exists. Keep records of assets returned. **3.** Organize and pack items purchased with federal funds and arrange for PCSC walk-through and pick-up. ➢ Boxes should be packed, closed, taped, and *clearly* labeled with name(s) and/or number(s) corresponding to the inventory. ➢ PCSC walk-though must be scheduled in advance and must be at least 2 days prior to the scheduled move day. ➢ At the time of the walk-through, all federal items must be prepared and distinctly separate from other school assets. If the school's items are not adequately prepared for moving, the PCSC will delay the date for pick-up of federal items.	School, PCSC			

Finalize School Affairs: Finance

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain IRS 501(c)(3) Status Maintain IRS 501(c)(3) status until final dissolution. Notify IRS regarding any address change(s) and file required tax returns and reports.	School			
Notify Funding Sources / Charitable Partners Notify all funding sources, including charitable partners of school closure. Notify state and federal agencies overseeing grants / programs of school closure.	School			
Review and Revise School Budget 1. Review the school's budget and overall financial condition. 2. Make revisions, taking closure expenses into account closure while prioritizing continuity of instruction. Submit budget to PCSC and SDE. 3. Identify acceptable use of reserve funds.	School, PCSC, SDE			
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. Note that the creditor list is not the same as the contractor list (above), but should include any contractors with whom the school owes money (based on a contract or invoice). 1. Creditors include lenders, mortgage holders, bond holders, equipment suppliers, service providers and secured and unsecured creditors. 2. 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.	School			
Notify Debtors and Process Payments Contact debtors to request payment. Process and document received payments.	School			
Determine PERSI Obligations Contact PERSI to determine remaining liabilities for employee retirement program.	School			
Notify and Pay Creditors 1. Notify all creditors of the school's closure and request final invoices. 2. Sell appropriate assets. 3. Prioritize and pay creditors in accordance with I.C. § 33-5212(2). Document payments made.	School			
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.	School			
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.	School, SDE, Fed			
Prepare Final Financial Statement Retain an independent accountant to prepare a final statement of the status of all contracts and 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.	School			
Complete Final Financial Audit Complete a financial audit of the school in accordance with statute by a date to be determined by the authorizer. Submit final audit to the PCSC and SDE.	School, PCSC, SDE			
Reconcile with State Reconcile state billings and payments. Reimbursement of funds previously disbursed to the school may be required.	School, SDE			

Finalize School Affairs: Reporting

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Prepare and Submit End-of-Year Reports **1.** Communicate with the PCSC regarding necessary end-year or annual data or reporting that needs to be submitted and identify deadlines. **2.** Prepare and submit annual reports to the authorizer.	School, PCSC			
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.	School			
Prepare and Submit Final ISEE Report Within 10 days of final closure, submit a final ISEE report to the SDE.	School, SDE			
Prepare and Submit Final Budget and Financial Reporting Within 120 days of final closure, submit a final budget and financial reporting, including final financial audit, to the SDE.	School, SDE			
Prepare and Submit All Other Required State and Federal Reports **1.** Communicate with the SDE and the federal government to identify any outstanding or final reports required for federal, state, or special programs (special education, Title I, etc.) and confirm deadlines. **2.** Prepare and submit reports to the SDE and/or federal government.	School, SDE			
Prepare and Submit Final Closure Report to the PCSC Submit the completed closure Protocol document and a narrative and/or attachments that outline the following: **1.** The name and contact information of the individual(s) with whom the PCSC can follow-up after closure if there are questions or issues to be addressed **2.** The school's final financial status, including the final independent audit **3.** The status of the transfer and storage of student records, including: • The school's total enrollment at the start of the final semester • The number and percentage of student records that have been transferred prior to closure • The plan for storage and access to student records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of public communication to parents regarding how to access student records after closure **4.** The status of the transfer and storage of personnel records, including: • The school's total number of staff at the beginning of the final semester • The number and percentage of personnel records that have been distributed to staff and/or new employers • If necessary, the plan for storage and access to personnel records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of communication to staff regarding how to access personnel records after closure **5.** Additional documentation (inventories, operational info, etc.) may be included with the report	School, PCSC			

Dissolution

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Dissolve the Charter School (I.C. § 30-3-110) **1.** Give appropriate notice of the meeting per Open Meeting law and statute, including the intention to vote on the dissolution of the corporation. **2.** The charter school board adopts a plan of dissolution indicating to whom the assets of the non-profit corporation will be distributed after all creditors have been paid. (I.C. § 33-5206(9)) **3.** Unless otherwise provided in the bylaws, the board of directors votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution. (I.C. § 30-3-112)	School			
Notify the Secretary of State (I.C. § 30-3-112) **1.** After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth: • The name of the non-profit corporation. • The date dissolution was authorized. • A statement that dissolution was approved by sufficient vote of the board. • If approval of members was not required (commonly true for public charter schools), a statement to that effect and a statement that dissolution was approved by a sufficient vote of the board of directors or incorporators • Such additional information as the Secretary of State determines is necessary or appropriate.	School			
Notify Known Claimants (I.C. § 30-3-114) Give written notice of the dissolution to known claimants after the effective date of the dissolution. Claimants have 120 days from the effective date of the written notice to submit a claim.	School			
End Corporate Existence (I.C. § 30-3-113) 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.** Preserving and protecting its assets and minimizing its liabilities. **2.** Discharging or making provision for discharging its liabilities. **3.** Disposing of its properties that will not be distributed in kind. **4.** Returning, transferring or conveying assets held by the corporation upon a condition requiring return, transfer or conveyance, which condition occurs by reason of dissolution, in accordance with such condition. **5.** Transferring, subject to any contractual or legal requirements, its assets as provided in or authorized by its articles of incorporation or bylaws. **6.** Doing every other act necessary to wind up and liquidate its assets and affairs.	School			
Notify IRS Notify the IRS of dissolution of the education corporation and its 501(c)(3) status and furnish a copy to the authorizer.	School			

"If charter schools are to have any hope of transforming public education, they cannot settle for simply being pretty good or just above average – especially when that average is well below what students need to succeed in the world. From this perspective, charter schools need to be about excellence. Specifically, they need to prove that excellence is possible and achievable at scale and under difficult circumstances, even with students whom others may have given up on."

"All of those who embark on this perilous journey of hope deserve our deepest gratitude and respect for embracing this challenge with courage, persistence and good faith. But these virtues alone are not enough. Charter schools are not supposed to rest on good intentions and earnest effort; they are supposed to achieve meaningful results demonstrated by a sound body of evidence over the charter term. Charter schools that cannot deliver on that promise, either to their students or the broader public, need to be closed. This is the unpleasant, but imperative responsibility of authorizers."

-- James A. Peyser and Maura Marino. "Why Good Authorizers Should Close Bad Schools."[1]

Appendix A1
Financial Summary

Financial Summary

Worksheet Instructions: This page will auto-populate as you complete the Pre-Operational and Operational Budget tabs.

Anticipated Enrollment for Each Scenario:	373	373	373	523	600
	2019-2020 Budget	Break-Even Year 1 Budget	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget
Cash on Hand/ Other Revenue Sources		$91,000.00			
Contributions/ Donations	107,800.00	107,800.00	107,800.00	117,675.00	120,000.00
Other Local Income	91,820.00	94,525.00	94,525.00	105,281.00	107,089.00
Grants	$120,000.00		$90,366.08	$249,607.49	$170,527.56
Federal Funds	$51,336.00	$133,541.00	$133,541.00	$156,825.00	$176,776.00
Base Support	$585,370.00	$602,921.00	$602,921.00	$822,684.00	$934,605.00
Salary and Benefit Apportionment	$1,606,964.06	$1,628,384.89	$1,628,384.89	$2,161,428.94	$2,391,013.62
Food Service Support	$92,901.00	$94,247.79	$94,247.79	$136,166.78	$146,067.21
Transportation Allowance	$0.00	$45,500.00	$45,500.00	$68,250.00	$91,000.00
Special Distributions	$369,991.60	$369,991.60	$369,991.60	$511,606.80	$562,974.50
REVENUE TOTAL	$3,026,182.66	$3,167,911.28	$3,167,277.37	$4,329,525.01	$4,700,052.88

	2019-2020 Budget	Break-Even Year 1 Budget	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget
Staff and Benefit Totals	$2,078,408.00	$2,239,613.37	$2,239,613.37	$2,867,697.92	$3,153,982.78
Educational Program Totals	$209,607.00	$261,508.00	$261,508.00	$274,909.00	$302,369.00
Technology Totals	$118,504.00	$118,939.00	$118,939.00	$139,091.00	$149,242.00
Capital Outlay Totals	$3,000.00	$3,500.00	$3,500.00	$4,300.00	$4,720.00
Board of Directors Totals	$54,350.00	$54,350.00	$54,350.00	$63,850.00	$63,850.00
Facilities Totals	$286,957.00	$265,957.00	$265,957.00	$660,550.00	$660,550.00
Transportation Totals	$0.00	$70,000.00	$70,000.00	$105,000.00	$140,000.00
Nutrition Totals	$42,238.00	$42,238.00	$42,238.00	$59,133.00	$68,003.00
Other	$197,359.00	$93,826.30	$93,826.30	$99,104.10	$101,446.10
EXPENSE TOTAL	$2,990,423.00	$3,149,931.67	$3,149,931.67	$4,273,635.01	$4,644,162.88
OPERATING INCOME (LOSS)	$35,759.66	$17,979.62	$17,345.70	$55,890.00	$55,890.00
PREVIOUS YEAR CARRYOVER	NA	711,462.08	$711,462.08	$17,345.70	$55,890.00
NET INCOME (LOSS)	$35,759.66	$17,979.62	$17,345.70	$55,890.00	$55,890.00

Appendix A2
Pre-Opening Budget

Legal Notice

Notice of Public Hearing Regarding ANSER Charter School FY 2019-20 Budget

Date: 6 p.m. June 11, 2019

Location: ANSER Charter School, 202 E 42nd St, Garden City, ID 208-426-9840

SUMMARY STATEMENT 2019 - 2020 SCHOOL BUDGET
ALL FUNDS
ANSER CHARTER SCHOOL

	GENERAL M & O FUND				ALL OTHER FUNDS			
	Prior Year Actual	Prior Year Actual	Current Budget	Proposed Budget	Prior Year Actual	Prior Year Actual	Current Budget	Proposed Budget
REVENUES	2016-17	2017-2018	2018-2019	2019-2020	2016-17	2017-2018	2018-2019	2019-2020
Beginning Balances	812,961	827,432	730,035	613,641	76,160	84,703	89,690	50,260
Local Revenue	158,460	141,071	127,800	140,800	124,819	132,076	209,660	245,820
County Revenue	-	-	-	-	-	-	-	-
State Revenue	2,187,612	2,211,061	2,357,582	2,489,743	55,269	71,965	93,002	92,200
Federal Revenue	-	-	-	-	108,566	95,843	42,757	81,336
Other Sources	-	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-	-
TOTALS ***	3,159,033	3,179,564	3,215,417	3,244,184	364,814	384,587	435,109	469,616
EXPENDITURES								
Salaries	1,342,531	1,407,606	1,425,790	1,517,599	142,769	134,636	162,362	220,067
Benefits	380,246	397,624	438,168	485,929	28,323	32,682	40,692	53,161
Purchased Services	250,180	292,385	249,430	270,210	22,517	15,456	16,000	34,618
Supplies & Materials	121,315	80,602	116,850	117,700	68,981	71,082	61,600	52,000
Capital Outlay	42,196	64,434	231,119	3,000	17,521	30,912	56,643	61,000
Debt Retirement	173,457	173,457	173,457	173,457	-	-	-	-
Insurance & Judgments	21,676	29,224	25,000	27,500	-	-	-	-
Transfers	-	-	-	-	-	-	-	-
Contingency Reserve	-	-	-	-	-	-	-	-
Unappropriated Balances	827,432	734,561	555,603	648,789	84,703	99,820	97,812	48,770
TOTALS ***	3,159,033	3,179,893	3,215,417	3,244,184	364,814	384,588	435,109	469,616

A copy of the School District Budget is available for public inspection at the Charter School Office.

Appendix A3
Three-Year Operating Budget & Break Even
Year 1 Scenario

Financial Summary

Worksheet Instructions: This page will auto-populate as you complete the Pre-Operational and Operational Budget tabs.

Revenue

Anticipated Enrollment for Each Scenario:	373	373	373	523	600
	2019-2020 Budget	Break-Even Year 1 Budget	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget
Cash on Hand/ Other Revenue Sources		$91,000.00			
Contributions/ Donations	107,800.00	107,800.00	107,800.00	117,675.00	120,000.00
Other Local Income	91,820.00	94,525.00	94,525.00	105,281.00	107,089.00
Grants	$120,000.00		$90,366.08	$249,607.49	$170,527.56
Federal Funds	$51,336.00	$133,541.00	$133,541.00	$156,825.00	$176,776.00
Base Support	$585,370.00	$602,921.00	$602,921.00	$822,684.00	$934,605.00
Salary and Benefit Apportionment	$1,606,964.06	$1,628,384.89	$1,628,384.89	$2,161,428.94	$2,391,013.62
Food Service Support	$92,901.00	$94,247.79	$94,247.79	$136,166.78	$146,067.21
Transportation Allowance	$0.00	$45,500.00	$45,500.00	$68,250.00	$91,000.00
Special Distributions	$369,991.60	$369,991.60	$369,991.60	$511,606.80	$562,974.50
REVENUE TOTAL	**$3,026,182.66**	**$3,167,911.28**	**$3,167,277.37**	**$4,329,525.01**	**$4,700,052.88**

Expenditures

	2019-2020 Budget	Break-Even Year 1 Budget	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget
Staff and Benefit Totals	$2,078,408.00	$2,239,613.37	$2,239,613.37	$2,867,697.92	$3,153,982.78
Educational Program Totals	$209,607.00	$261,508.00	$261,508.00	$274,909.00	$302,369.00
Technology Totals	$118,504.00	$118,939.00	$118,939.00	$139,091.00	$149,242.00
Capital Outlay Totals	$3,000.00	$3,500.00	$3,500.00	$4,300.00	$4,720.00
Board of Directors Totals	$54,350.00	$54,350.00	$54,350.00	$63,850.00	$63,850.00
Facilities Totals	$286,957.00	$265,957.00	$265,957.00	$660,550.00	$660,550.00
Transportation Totals	$0.00	$70,000.00	$70,000.00	$105,000.00	$140,000.00
Nutrition Totals	$42,238.00	$42,238.00	$42,238.00	$59,133.00	$68,003.00
Other	$197,359.00	$93,826.30	$93,826.30	$99,104.10	$101,446.10
EXPENSE TOTAL	**$2,990,423.00**	**$3,149,931.67**	**$3,149,931.67**	**$4,273,635.01**	**$4,644,162.88**
OPERATING INCOME (LOSS)	**$35,759.66**	**$17,979.62**	**$17,345.70**	**$55,890.00**	**$55,890.00**
PREVIOUS YEAR CARRYOVER	**NA**	**711,462.08**	**$711,462.08**	**$17,345.70**	**$55,890.00**
NET INCOME (LOSS)	**35,759.66**	**$17,979.62**	**$17,345.70**	**$55,890.00**	**$55,890.00**

Idaho Public Charter School Commission
Charter Petition: Operational Budgets

Worksheet Instructions: list revenues, expenditures, and Full-Time Equivalencies (FTE) anticipated during the pre-operational year. Insert rows as necessary throughout the document. Include notes specific to start-up costs (details, sources, etc.) in the Assumptions column.

Operational Revenue

Anticipated Enrollment for Each Scenario:	373	373	373	523	600	
Line Item / Account	**2019-2020 Budget**	**Break-Even Year 1 Budget**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Cash on Hand	$675,703.42	$711,462.08	$711,462.08	NA	NA	From Audited Financial Statements
Interest on Investments	3,000.00	3,000.00	$3,090.00	$3,183.00	$3,278.00	Based on current cash balances
Donations and Contributions	107,800.00	107,800.00	$107,800.00	$117,675.00	$120,000.00	Estimate based on past fundraising: Fall Fund Drive and Spring Auction. Change in demographics expected to reduce per student amount.
Rental Income	$ 30,000.00	30,000.00	$30,000.00	$35,000.00	$35,000.00	Weekend/Summer classroom Rental, Gym Rental
AAYC	$ 53,820.00	53,820.00	$55,435.00	$57,098.00	$58,811.00	Based on current program + increase in enrollment
ERATE	$ 5,000.00	5,000.00	$6,000.00	$10,000.00	$10,000.00	
Grants	$ 120,000.00	120,000.00	$90,366.08	$249,607.49	$170,527.56	BLUUM Fellowship Grant (FY20) and JKAFF Grant (FY21-FY23) - For Breakeven replace grants with funds from reserves and/or do not increase staffing.
Entitlement	$ 585,370.00	585,370.00	$602,921.00	$822,684.00	$934,605.00	Based on SDE Budget Calculations
Salary and Benefit Apportionment	$ 1,606,964.06	1,606,964.06	$1,628,384.89	$2,161,428.94	$2,391,013.62	Based on SDE Budget Calculations
Transportation Allowance	$ -	-	$ 45,500.00	$ 68,250.00	$ 91,000.00	
Federal Funds						
Food Service Support	$ 92,901.00	$ 92,901.00	$94,247.79	$136,166.78	$146,067.21	Based on current program adjusted for growth
Title I	$ -	$ -	$ 31,705.00	$ 44,455.00	$ 51,000.00	
Title II	$ -	$ -	$ 13,000.00	$ 13,000.00	$ 13,000.00	
Title IV	$ -	$ -	$ 10,000.00	$ 10,000.00	$ 10,000.00	
IDEA	$ 51,336.00	$ 51,336.00	$51,336.00	$71,870.00	$82,651.00	Based on current funding adjusted for growth
Medicaid	$ -	$ -	$ 27,500.00	$ 17,500.00	$ 20,125.00	
Special Distributions						From the SDE Special Distributions Doc.
Charter School Facilities	$ 149,200.00	$ 149,200.00	$ 149,200.00	$ 209,200.00	$ 240,000.00	$400 per enrolled student for on-site charter schools.
Content and Curriculum	$ 3,348.00	$ 3,348.00	$ 3,348.00	$ 3,883.20	$ 4,108.00	Sum of a $1,700 base amount, plus $80 per 2019-2020 mid-term Support Unit.
Continuous Improvement Plans and Training	$ 6,600.00	$ 6,600.00	$ 6,600.00	$ 6,600.00	$ 6,600.00	$6,600 per school district or charter school. Funds will be distributed on a reimbursement basis.
Gifted Talented	$ 3,627.00	$ 3,627.00	$ 3,627.00	$ 3,879.00	$ 4,008.00	Assume 6% will be met and used.
Leadership Premiums	$ 23,278.00	$ 23,278.00	$ 23,278.00	$ 30,597.00	$ 34,205.50	$850 Per instructional Staff
IT Staffing	$ 15,000.00	$ 15,000.00	$ 15,000.00	$ 15,000.00	$ 15,000.00	See 2019-2020 Formula in "Special Distributions" document.

Math and Science Requirement	$ -	$ -	$ -	$ -	$ -	See 2019-2020 Formula in "Special Distributions" document.
Professional Development	$ 34,598.00	$ 34,598.00	$ 34,598.00	$ 40,502.00	$ 44,233.00	$15,000 per school district or charter school plus $820 per 2019-2020 instructional and pupil service FTE (all fund sources)
Safe and Drug-Free Schools	$ 6,252.20	$ 6,252.20	$ 6,252.20	$ 7,962.20	$ 8,840.00	$2000.00 + $12 per ADA
Technology (i.e. infrastructure)	$ 71,435.00	$ 71,435.00	$ 71,435.00	$ 85,685.00	$ 93,000.00	See 2019-2020 Formula in "Special Distributions" document.
Advanced Opportunities		$ -				Based on SDE Budget Calculation Guidelines
College and Career Advisors/ Mentors	$ 9,000.00	$ 9,000.00	$ 9,000.00	$ 9,000.00	$ 9,000.00	See 2019-2020 Formula in "Special Distributions" document.
Literacy Proficiency	$ 24,975.00	$ 24,975.00	$ 24,975.00	$ 67,500.00	$ 67,500.00	$675 per average number of students in kindergarten through grade 3 who scored basic or below basic on the fall statewide reading assessment in the prior three years
Limited English Proficient (LEP)		$ -				Based on SDE Budget Calculation Guidelines
School Facilities (Lottery)	$ 22,678.40	$ 22,678.40	$ 22,678.40	$ 31,798.40	$ 36,480.00	Estimate based on SDE Budget Guidance
REVENUE TOTAL	**$3,701,886.08**	**$3,737,644.73**	**$3,878,739.44**	**$4,329,525.01**	**$4,700,052.88**	

Operational Expenditures

Section 1: Staffing

1a: CERTIFIED STAFF	2019-2020 Budget		Break-Even Year		2020-2021 Budget		2021-2022 Budget		2022-2023 Budget		Assumptions / Details / Sources
Classroom Teachers			FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Elementary Teachers	11.0	594,031.00	11.0	594,031.00	11.0	579,446.11	16.5	789,523.50	19.5	924,556.50	
Secondary Teachers	5.0	243,994.00	5.0	243,994.00	5.0	266,499.50	5.0	266,499.50	5.0	266,499.50	
Specialty Teachers	3.9	145,230.00	3.9	145,230.00	3.9	145,229.13	5.6	236,412.65	6.2	259,895.70	
Classroom Teacher Subtotals	19.90	983,255.00	19.90	983,255.00	19.90	991,174.74	27.10	1,292,435.65	30.65	1,450,951.70	
Special Education	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
SPED Director	0.0	-	0.0	-	1.0	58,000.00	1.0	58,000.00	1.0	58,000.00	
Special Education Teacher	3.0	144,179.00	3.0	144,179.00	2.0	99,168.00	2.0	99,168.00	2.0	99,168.00	
Special Education Subtotals	3.00	144,179.00	3.00	144,179.00	3.00	157,168.00	1.00	157,168.00	3.00	157,168.00	Anticipated % Special Education Students:
Other Certified Staff	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Lead Administrator	1.0	81,411.00	1.0	81,411.00	1.0	83,853.33	1.0	86,368.93	1.0	88,960.00	
Assistant Administrator	0.0	-	0.0	-	0.0	-	1.0	65,000.00	1.0	66,950.00	Add in expansion year
Pupil Service Staff	1.0	56,175.00	1.0	56,175.00	1.0	58,450.42	1.0	60203.94	2.0	107,021.06	
Other Certified Staff Subtotals	2.00	137,586.00	2.00	137,586.00	2.00	142,303.75	3.00	211,572.87	4.00	262,931.05	
CERTIFIED STAFF TOTAL	**24.90**	**1,265,020.00**	**24.90**	**1,265,020.00**	**24.90**	**$1,290,646.49**	**31.10**	**$1,661,176.52**	**37.65**	**$1,871,050.75**	

1b: CLASSIFIED STAFF	2019-2020 Budget		Break-Even Year		2020-2021 Budget		2021-2022 Budget		2022-2023 Budget		Assumptions / Details / Sources
Position	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Paraprofessionals- General	0.0	-	0.0	-	0.0	-	3.0	44,640.00	4.0	59,520.00	
Paraprofessionals- SPED	0.0	20,650.00	0.0	20,650.00	1.3	20,650.00	2.0	32,525.00	2.0	32,525.00	
Admin / Front Office Staff	0.0	172,444.00	0.0	172,444.00	5.0	268,276.87	6.8	286,817.21	6.8	290,804.13	Add Part time data manager in planning year
Other	0.0	100,215.00	0.0	100,215.00	4.0	109,607.95	3.8	130,155.49	4.8	130,880.89	
CLASSIFIED STAFF TOTAL	**0.00**	**293,309.00**	**0.00**	**293,309.00**	**10.29**	**398,534.82**	**15.55**	**494,137.70**	**17.60**	**513,730.01**	

1c: BENEFITS	2019-2020 Budget		Break-Even Year		2020-2021 Budget		2021-2022 Budget		2022-2023 Budget		Assumptions / Details / Sources
Type	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	
Retirement		185,381.00		185,381.00		197,619.34		256,595.28		283,993.59	Rate = 11.94% Includes stipends and AAYC
Workers comp/ FICA/ Medicare		141,149.00		141,149.00		148,989.52		185,854.69		204,506.88	Rate = 7.65 FICA Plus variable Workers Comp
Group Insurance (Medical/Dental)		165,843.00		165,843.00		174,388.00		232,162.00		238,792.00	For staff that participates either $8304 or $6380 - Assume new staff will participate.
Life Insurance		9,696.00		9,696.00		10,236.00		12,842.88		14,318.88	Rate varies based on employee
Paid time off (provide assumptions)		18,010.00		18,010.00		19,199.20		24,928.85		27,590.67	Rate = 1.16% of salaries
BENEFITS TOTAL		**520,079.00**		**520,079.00**		**550,432.05**		**712,383.70**		**769,202.01**	
CERTIFIED & CLASSIFIED STAFF TOTAL		**1,558,329.00**		**1,558,329.00**		**1,689,181.31**		**$2,155,314.21**		**$2,384,780.77**	
TOTAL STAFF & BENEFITS TOTAL		**2,078,408.00**		**2,078,408.00**		**2,239,613.37**		**$2,867,697.92**		**$3,153,982.78**	

Section 2: Educational Program						
2a: OVERALL EDUCATION PROGRAM COSTS	**2019-2020 Budget**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Professional Development	27,937.00	27,937.00	34,958.00	30,062.00	33,123.00	Includes professional development stipends and additional budgeted Professional Development program expenses
SPED Contract Services	620.00	620.00	55,500.00	35,500.00	40,750.00	Higher planning year expense for consulting to help with becoming LEA and starting Title programs.
Instructional Improvement Services	27,000.00	27,000.00	27,000.00	37,800.00	43,470.00	EL Contract
Membership Dues	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	Ed Director
Authorizer Fee	15,000.00	15,000.00	15,000.00	15,000.00	15,000.00	Estimated fee
Other Contract Services (i.e. accounting, HR, management)	$ 52,450.00	52,450.00	$ 42,950.00	$ 43,950.00	$ 44,950.00	Copier Lease, Payroll Processing
Office Supplies	16,000.00	16,000.00	16,000.00	22,000.00	25,150.00	Increases with enrollment
OVERALL EDUCATION PROGRAM TOTAL	**141,507.00**	**141,507.00**	**193,908.00**	**186,812.00**	**204,943.00**	

2b: ELEMENTARY PROGRAM	**2019-2020 Budget**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Elementary Curriculum	10,000.00	10,000.00	10,000.00	14,000.00	16,100.00	Based on current, increases with enrollment
Elementary Instructional Supplies & Consumables	34,100.00	34,100.00	34,100.00	47,797.00	53,556.00	Based on current, increases with enrollment
Elementary Special Education Curricular Materials	500.00	500.00				
Elementary Community Based Curriculum Partners	7,000.00	7,000.00	7,000.00	9,800.00	11,270.00	Based on current, increases with enrollment
ELEMENTARY PROGRAM TOTAL	**51,600.00**	**51,600.00**	**51,100.00**	**71,597.00**	**80,926.00**	

2c: SECONDARY PROGRAM	**2019-2020 Budget**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Secondary Curriculum	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00	Based on current budget
Secondary Instructional Supplies & Consumables	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	Based on current budget
Secondary Special Education Curricular Materials		-				
Secondary Elective Services	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	Community Partners/IDLA Tuition
SECONDARY PROGRAM TOTAL	**16,500.00**	**16,500.00**	**16,500.00**	**16,500.00**	**16,500.00**	
EDUCATIONAL PROGRAM TOTAL	**209,607.00**	**209,607.00**	**261,508.00**	**274,909.00**	**302,369.00**	
Additional Notes or Details Regarding Educational Program Expenditures:						

Section 3: Technology						
Line Item / Account	**2019-2020 Budget**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Internet Access	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	Based on current budget
Admin Contracted Services	11,004.00	11,004.00	11,004.00	15,406.00	17,717.00	Based on current, increases with enrollment
Admin Technology Software & Licenses	13,000.00	13,000.00	13,000.00	13,000.00	13,000.00	Based on current budget
Admin Technology Other Expenses	3,500.00	3,500.00	3,500.00	5,000.00	5,525.00	Based on current, increases with enrollment
Other Technology Expenses	86,000.00	86,000.00	86,435.00	100,685.00	108,000.00	IT Staff + Tech Equipment
TECHNOLOGY TOTAL	**118,504.00**	**118,504.00**	**118,939.00**	**139,091.00**	**149,242.00**	
Additional Notes or Details Regarding Technology Expenditures:						

Section 4: Non-Facilities Capital Outlay						
Line Item / Account	**2019-2020 Budget**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Furniture (school-wide)	1,500.00	1,500.00	1,500.00	1,900.00	2,110.00	Misc small iteams
Kitchen Equipment (warming oven, salad bar, etc.)		-				
Other Capital Outlay (i.e. library, kitchen small wares, maintenance equipment, etc.)	1,500.00	1,500.00	2,000.00	2,400.00	2,610.00	Lunch program small wares-Library Books
CAPITAL OUTLAY TOTAL	**3,000.00**	**3,000.00**	**3,500.00**	**4,300.00**	**4,720.00**	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:						

Section 5: Board of Directors						
Line Item / Account	2019-2020 Budget	Break-Even Year	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget	Assumptions / Details / Sources
Board Training	8,100.00	8,100.00	8,100.00	8,100.00	8,100.00	Annual Retreat and Training
Legal	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00	Based on past expense history
Advertising/Community Outreach	10,750.00	10,750.00	10,750.00	10,750.00	10,750.00	Supports Recruiting Plan
Fundraising Expenses	12,000.00	12,000.00	12,000.00	12,000.00	12,000.00	Spring Auction Expenses
Insurance (property, liability, E & O, etc.)	9,500.00	9,500.00	9,500.00	19,000.00	19,000.00	Estimate double current for new facility
Audit	8,000.00	8,000.00	8,000.00	8,000.00	8,000.00	Based on past expense history
BOARD OF DIRECTORS TOTALS	**54,350.00**	**54,350.00**	**54,350.00**	**63,850.00**	**63,850.00**	
Additional Notes or Details Regarding Board of Directors Expenditures:						

Section 6: Facilities Details (consistent with facilities template)						
Line Item / Account	2019-2020 Budget	Break-Even Year	2020-2021 Budget	2021-2022 Budget	2022-2023 Budget	Assumptions / Details / Sources
Mortgage or Lease	173,457.00	173,457.00	173,457.00	558,900.00	558,900.00	Existing Mortage refinanced with expansion
Construction / Remodeling (if applicable)	2,000.00	2,000.00	-	-	-	
Repairs and Maintenance	65,000.00	65,000.00	46,000.00	46,000.00	46,000.00	Required Allocation per Code 33-1019
Facilities Maintenance Contracts (i.e. snow removal; trash; lawn care, custodial, security, etc.)	11,000.00	11,000.00	11,000.00	11,000.00	11,000.00	Grounds maintenance contracts - Based on past history. No significant change to grounds.
Utilities (i.e. gas, electric, water, etc.)	25,500.00	25,500.00	25,500.00	33,150.00	33,150.00	Electricity, Natural Gas, Water, Sewer, Trash
Phone	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	
Other Facilities Related Costs (specify)	5,000.00	5,000.00	5,000.00	6,500.00	6,500.00	Custodial Supplies
FACILITIES TOTAL	**286,957.00**	**286,957.00**	**265,957.00**	**660,550.00**	**660,550.00**	
Additional Notes or Details Regarding Facilities Expenditures:						

Section 7: Transportation						
Line Item / Account	**Pre-Operational**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Daily Transportation	-	-	70,000.00	105,000.00	140,000.00	**Initially 2 routes expanding to 5 at full enrollment.**
Special Transportation (i.e. SPED, field trips, etc.)	-	-				
Other Transportation Costs (specify)	-	-				
TRANSPORTATION TOTAL	**-**	**-**	**70,000.00**	**105,000.00**	**140,000.00**	
Additional Notes or Details Regarding Transportation Expenditures:						

Section 8: Nutrition Program						
Line Item / Account	**Pre-Operational**	**Break-Even Year**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Food Costs	36,638.00	36,638.00	36,638.00	51,293.00	58,987.00	Based on current program history
Non-Food Costs	5,600.00	5,600.00	5,600.00	7,840.00	9,016.00	Based on current program history
NUTRITION TOTAL	**42,238.00**	**42,238.00**	**42,238.00**	**59,133.00**	**68,003.00**	
Additional Notes or Details Regarding Other Expenditures:						

Section 9: Other Expenditures						
Line Item / Account	**Pre-Operational**	**Break-Even Year 1 Budget**	**2020-2021 Budget**	**2021-2022 Budget**	**2022-2023 Budget**	**Assumptions / Details / Sources**
Substitutes and Stipend Expenses	25,018.00	25,018.00	23,817.50	28,217.50	30,217.50	
AAYC Expenses	57,047.00	57,047.00	56,046.60	56,046.60	56,046.60	Based on current program history
Playground/Safety	12,200.00	12,200.00	13,962.20	14,840.00	15,182.00	
BLUUM Fellowship	103,094.00	103,094.00				
		-	-	-	-	
OTHER TOTAL	**197,359.00**	**197,359.00**	**93,826.30**	**99,104.10**	**101,446.10**	
Additional Notes or Details Regarding Other Expenditures:						

Idaho Public Charter School Commission

Charter Petition: Pre-Operational Budget

Worksheet Instructions: list revenues, expenditures, and Full-Time Equivalencies (FTE) anticipated during the pre-operational year. Insert rows as necessary throughout the document. Include notes specific to start-up costs (details, sources, etc.) in the Assumptions column.

Pre-Operational Revenue

Line Item / Account	Budget	Assumptions / Details / Sources
Donations and Contributions	107,800.00	Only include secured funds. Sum all donations/contributions here. Provide documentation for each donation/contribution as appendices.
Loans	53,820.00	Include documentation that provides the lender, term, rate, and total principal.
Grants	120,000.00	Only include secured grants. Provide documentation of grantor, total amount, and any applicable restrictions or requirements.
	585,370.00	
	1,606,964.06	
	-	

	-	
	149,200.00	
	3,348.00	
	6,600.00	
	3,627.00	
	23,278.00	
	15,000.00	
	-	
	34,598.00	
	6,252.20	
	71,435.00	
	-	
	9,000.00	
	24,975.00	
	-	
	22,678.40	
Other Revenue	-	Include details and documentation as necessary.
REVENUE TOTAL	**$2,843,945.66**	

Pre-Operational Expenditures

Section 1: Staffing

1a: CERTIFIED STAFF	Budget		Assumptions / Details / Sources
Classroom Teachers	**FTE**	**Amount**	
Elementary Teachers	11.0	594,031.00	
Secondary Teachers	5.0	243,994.00	
Specialty Teachers	3.9	145,230.00	
Classroom Teacher Subtotals	19.9	983,255.00	Average classroom size:
Special Education	**FTE**	**Amount**	
SPED Director / Coordinator	0.0	-	
Special Education Teacher	3.0	144,179.00	
Special Education Subtotals	3.0	144,179.00	Anticipated % Special Education Students:
Other Certified Staff	**FTE**	**Amount**	
Lead Administrator	1.0	81,411.00	
Assistant Administrator	1.0	56,175.00	
Other Certified Staff Subtotals	2.0	137,586.00	
CERTIFIED STAFF TOTAL	**24.9**	**1,265,020.00**	

1b: CLASSIFIED STAFF	Budget		Assumptions / Details / Sources
Position	**FTE**	**Amount**	
Paraprofessionals- General	0.0	-	
Paraprofessionals- SPED	0.0	20,650.00	
Admin / Front Office Staff	0.0	172,444.00	
CLASSIFIED STAFF TOTAL	**0.0**	**193,094.00**	

1c: BENEFITS	Budget		Assumptions / Details / Sources
Type	**Rate**	**Amount**	
Retirement	Rate	Amount	
Workers comp	0.0	185,381.00	
FICA/Medicare	0.0	141,149.00	
Group insurance	0.0	165,843.00	

Paid time off (provide assumptions)	0.0	18,010.00	
BENEFITS TOTAL		**510,383.00**	
CERTIFIED & CLASSIFIED STAFF TOTAL		**1,458,114.00**	
TOTAL STAFF & BENEFITS TOTAL		**1,968,497.00**	

Section 2: Educational Program		
2a: OVERALL EDUCATION PROGRAM COSTS	**Budget**	**Assumptions / Details / Sources**
Professional Development	27,937.00	
SPED Contract Services	620.00	Types of anticipated SPED Contractors:
Membership Dues (if applicable)	2,500.00	
	15,000.00	
Other Contract Services (i.e. accounting, HR, management)	52,450.00	
Office Supplies	16,000.00	
OVERALL EDUCATION PROGRAM TOTAL	**31,057.00**	

2b: ELEMENTARY PROGRAM	**Budget**	**Assumptions / Details / Sources**
Elementary Curriculum	10,000.00	
Elementary Instructional Supplies & Consumables	34,100.00	
Elementary Special Education Curricular Materials	500.00	
Elementary Contract Services (provide assumptions)	7,000.00	Types of anticipated Contractors:
ELEMENTARY PROGRAM TOTAL	**51,600.00**	

2c: SECONDARY PROGRAM	**Budget**	**Assumptions / Details / Sources**
Secondary Curriculum	6,000.00	
Secondary Instructional Supplies & Consumables	2,500.00	
Secondary Special Education Curricular Materials	-	
Secondary Contract Services (provide assumptions)	8,000.00	Types of anticipated Contractors:
SECONDARY PROGRAM TOTAL	**16,500.00**	
EDUCATIONAL PROGRAM TOTAL	**99,157.00**	
Additional Notes or Details Regarding Educational Program Expenditures:		

Section 3: Technology		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Internet Access	5,000.00	
Contract Services	11,004.00	
Technology Software & Licenses	13,000.00	
Computers for Staff Use	3,500.00	
Other Technology Hardware (i.e. document cameras, projectors, etc.)	86,000.00	
TECHNOLOGY TOTAL	**118,504.00**	
Additional Notes or Details Regarding Technology Expenditures:		

Section 4: Non-Facilities Capital Outlay		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Furniture (school-wide)	1,500.00	Include only items not covered via FFE, if applicable.
Kitchen Equipment (warming oven, salad bar, etc.)	-	
Other Capital Outlay (i.e. library, kitchen small wares, maintenance equipment, etc.)	1,500.00	
CAPITAL OUTLAY TOTAL	**3,000.00**	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:		

Section 5: Board of Directors		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Board Training	8,100.00	
Legal	6,000.00	
Insurance (property, liability, E & O, etc.)	9,500.00	
Audit	8,000.00	
BOARD OF DIRECTORS TOTAL	**31,600.00**	
Additional Notes or Details regarding Board of Directors Expenditures:		

Section 6: Facilities Details (consistent with facilities template)		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Mortgage or Lease	173,457.00	
Construction / Remodeling (if applicable)	2,000.00	
Repairs and Maintenance	65,000.00	
Facilities Maintenance Contracts (i.e. snow removal, lawn care, custodial, security, etc.)	11,000.00	
Utilities (i.e. gas, electric, water, etc.)	25,500.00	
Phone	5,000.00	
Other Facilities Related Costs (specify)	5,000.00	
FACILITIES TOTAL	**286,957.00**	
Additional Notes or Details Regarding Facilities Expenditures:		

Section 7: Transportation		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Daily Transportation	-	
Special Transportation (i.e. SPED, field trips, etc.)	-	
Other Transportation Costs (specify)	-	
TRANSPORTATION TOTAL	**$0.00**	
Additional Notes or Details Regarding Transportation Expenditures:		

Section 8: Nutrition		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
Food Costs	36,638.00	
Non-Food Costs	5,600.00	
OTHER TOTAL	**42,238.00**	
Additional Notes or Details Regarding Transportation Expenditures:		

Section 9: Other Expenditures		
Line Item / Account	**Budget**	**Assumptions / Details / Sources**
	25,018.00	
	-	
OTHER TOTAL	**25,018.00**	
Additional Notes or Details Regarding Transportation Expenditures:		

Appendix A4
Cash Flow Projection for Initial Operating Year

Cash Flow Operational Year 1

	Year 1 Budgeted	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	Total
Student Enrollment Capacity	373													
Revenue														
Contributions/ Donations	107,800				$5,000.00	$15,000.00	$20,000.00				$67,800.00			*$107,800.00*
Other Local Income	94,525			$10,502.78	$10,502.78	$10,502.78	$10,502.78	$10,502.78	$10,502.78	$10,502.78	$10,502.78	$10,502.78		*$94,525.00*
Grants	90,366	$90,366.08												*$90,366.08*
Federal Funds	133,541						$133,541.00							*$133,541.00*
Base Support	602,921		$301,460.50			$120,584.20			$120,584.20			$60,292.10		*$602,921.00*
Salary and Benefit Apportionment	1,628,385		$814,192.45			$325,676.98			$325,676.98			$162,838.49		*$1,628,384.89*
Food Service Support	94,248				$10,471.98	$10,471.98	$10,471.98	$10,471.98	$10,471.98	$10,471.98	$10,471.98	$10,471.98	$10,471.98	*$94,247.79*
Transportation Allowance	45,500					$18,200.00			$9,100.00			$4,550.00	$13,650.00	*$45,500.00*
Special Distributions	369,992		$ 22,678.40			$99,287.20	$ 24,975.00		$7,200.00	$30,356.80	$ 4,296.60	$174,278.00	$6,919.60	*$369,991.60*
Total Revenue	$3,167,277.37	$90,366.08	$1,138,331.35	$10,502.78	$25,974.75	$599,723.13	$199,490.75	$20,974.75	$483,535.93	$51,331.55	$93,071.35	$422,933.34	$31,041.58	$3,167,277.37
Expenditures														
Staff and Benefit Totals	$2,239,613.37	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	$186,634.45	*$2,239,613.37*
Educational Program Totals	$261,508.00			$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	$26,150.80	*$261,508.00*
Technology Totals	$118,939.00						$118,939.00							*$118,939.00*
Capital Outlay Totals	$3,500.00			$3,500.00										*$3,500.00*
Board of Directors Totals	$54,350.00			$10,000.00	$2,000.00	$2,000.00	$2,000.00	$5,000.00	$5,000.00	$10,000.00	$1,000.00	$17,350.00		*$54,350.00*
Facilities Totals	$265,957.00	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	$22,163.08	*$265,957.00*
Transportation Totals	$70,000.00			$7,777.78	$7,777.78	$7,777.78	$7,777.78	$7,777.78	$7,777.78	$7,777.78	$7,777.78	$7,777.78		*$70,000.00*
Nutrition Totals	$42,238.00		$4,693.11	$4,693.11	$4,693.11	$4,693.11	$4,693.11	$4,693.11	$4,693.11	$4,693.11	$4,693.11			*$42,238.00*
Other	$93,826.30			$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	$9,382.63	*$93,826.30*
Total Expenditures	$3,149,931.67	$208,797.53	$213,490.64	$270,301.85	$258,801.85	$258,801.85	$377,740.85	$261,801.85	$261,801.85	$266,801.85	$257,801.85	$269,458.74	$244,330.96	$3,149,931.67
Cash Flow														
Operational Cash Flow		($118,431.45)	$924,840.71	($259,799.07)	($232,827.10)	$340,921.28	($178,250.10)	($240,827.10)	$221,734.08	($215,470.30)	($164,730.50)	$153,474.61	($213,289.38)	$17,345.70
Cash on Hand	$711,462.08	$711,462.08	$593,030.63	$1,517,871.33	$1,258,072.26	$1,025,245.17	$1,366,166.45	$1,187,916.36	$947,089.26	$1,168,823.34	$953,353.05	$788,622.55	$942,097.16	
Cash End of Period		$593,030.63	$1,517,871.33	$1,258,072.26	$1,025,245.17	$1,366,166.45	$1,187,916.36	$947,089.26	$1,168,823.34	$953,353.05	$788,622.55	$942,097.16	$728,807.78	$17,345.70

Appendix A5
Facility Options

Appendix B
Articles of Incorporation and Bylaws

State of Idaho

Department of State

CERTIFICATE OF INCORPORATION
OF

ANSER OF IDAHO, INC.
File number C 118784

I, PETE T. CENARRUSA, Secretary of State of the State of Idaho, hereby certify that duplicate originals of Articles of Incorporation for the incorporation of ANSER OF IDAHO, INC. duly signed pursuant to the provisions of the Idaho Nonprofit Corporation Act, have been received in this office and are found to conform to law.

ACCORDINGLY and by virtue of the authority vested in me by law, I issue this Certificate of Incorporation and attach hereto a duplicate original of the Articles of Incorporation.

Dated: March 24, 1997

THE GREAT SEAL OF THE STATE OF IDAHO
ESTO PERPETUA

Pete T. Cenarrusa
SECRETARY OF STATE

By Alice Hostetler

ARTICLES OF INCORPORATION

Mar 24 8 04 AM '97

OF

ANSER OF IDAHO, INC.

(An Idaho Corporation)

KNOW ALL MEN BY THESE PRESENTS, That we, the undersigned, being mature persons of full age and citizens of Idaho and the United States, in order to form a non-profit corporation for the purposes hereinafter stated pursuant to the provisions of Chapter 3, Title 30, Idaho Code, do hereby certify as follows:

I

That the name of the corporation shall be "ANSER OF IDAHO, INC.", which is a Nonprofit Corporation.

II

That this corporation is not formed for pecuniary profit nor shall any part of the revenue or income of the corporation inure to the benefit of any educator thereof or of any individual, or be applied or used for any purpose other than to further the objects and purposes of the corporation, which are as follows:

(a) To develop and implement a school to reflect an openness responsive to the ideas and interests of:

- the sponsoring foundation
- local Idaho school districts
- the state of Idaho
- the communities in which the school is located
- universities
- parents
- businesses
- public and private education

(b) To develop and implement a school with a commitment to reflect, validate, and celebrate the best of public schools' efforts for children;

(c) To develop and implement a school that employs a for the child-centered decision making focus;

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(d) To develop and implement a school with a socio-economic balance matching the local communities in which the school is located;

(e) To develop and implement a school with a professional compensation for staff comparable to local districts;

(f) To develop and implement a school that offers choices for students and parents within a single building. As examples, extended calendar, instructional focus and delivery such as multi-age, traditional, performing arts, etc. . .;

(g) To develop and implement a school which will hopefully evolve into a K-12 school;

(h) To develop and implement a school that includes an emphasis on professional development for educators through exposure and experience;

(i) To develop and implement a school that has an advisory board of directors nominated and appointed by ANSER and the future sponsoring Foundation;

(j) To develop and implement a school that offers opportunities for before and after school activities;

(k) To develop and implement a school that incorporates an authentic assessment of student achievement;

(l) To develop and implement a school that applies developmentally appropriate educational practices;

(m) To receive a grant from the future sponsoring foundation and to receive donations and contributions to be used in the realization and in the furtherance of the objects and purposes specified in the preceding paragraphs (a) through (l);

(n) To attain the status of a 501(c)(3) entity, or such other Internal Revenue Service designation under Section 501(c) of the Internal Revenue Code, such that the donations and contributions made to the corporation are tax deductible to the donor as a charitable deduction and such that the corporation is exempt from income taxes;

4 8 04 AM '97

(o) To perform fundraisers, or such other events, from which revenue shall solely be used to promote the objects and purposes specified in the preceding paragraphs (a) through (l), and not for the profit of the corporation, or any individual thereof, but which may be used to pay employees or persons or entities with whom the corporation contracts;

(p) In furtherance and not in limitation of the general powers of the corporation conferred by the laws of the State of Idaho and of the objects and purposes hereinabove referred to, it is expressly provided that the corporation shall also have the following powers, that is to say, to enter into and perform all manner and kinds of contracts, agreements, and obligations for any lawful purpose by or with any person, firm, association, corporation, or governmental division or subdivision, including the officers and directors of the corporation;

(q) The foregoing enumeration of specific powers shall not be interpreted to limit or restrict in any manner the general powers of the corporation, and the enjoyment and exercise thereof, as granted by the laws of the State of Idaho upon nonprofit corporations organized under the provisions of the law hereinabove referred to.

III

That the place in this state where the principal office of the Corporation is to be located in Idaho, Ada County.

IV

That the said corporation is organized exclusively for educational purposes, including, for such purposes, the teaching of children.

V

That the period of duration of the corporation is perpetual.

8 04 AM '97

VI

That the street address of the Registered Office of the corporation shall be 4761 N. Fieldcrest Way, Boise, Idaho, 83704, and the initial registered agent shall be William D. Burbank whose address is the same as above stated.

VII

That the corporation will not have members, but will have employees, volunteers, parents, an advisory committee, and additional associations, corporations, foundations, and governmental divisions or subdivisions, and etc. . ., that will have an interest in ANSER and will work for the overall realization and furtherance of the objects and purposes stated above in Section II (a) through (l).

VIII

That the Board of Directors shall hold an annual meeting on the third Tuesday of June at 1 o'clock PM. All individuals or groups stated in Section VII shall be allowed to attend, with the exception of any media. The meeting shall be closed to the public.

That at the annual meeting of the Board of Directors the agenda shall be informative and shall be chosen by the Board of Directors and shall include a set time in which the Board of Directors shall hear comments.

IX

That the Board of Directors shall set up a guideline committee, hereafter referred to as the Guidance Committee, numbering not less than five persons. Each year at the end of May, the committee shall review the actions of the Board of Directors and shall offer, at the annual meeting of the Board of Directors of the corporation, nominations to fill vacancies or nominations for additional Directors and shall recommend, with appropriate reasoning, the discharge of any Directors who haven't been filling their positions in a professional manner or who have conflicts of interest.

MAR 24 8 04 AM '97

SECRETARY OF STATE
STATE OF IDAHO

X

That the government and management of the affairs and property of the corporation, and the exercise of its corporate powers, are and shall be vested in and exercised by the Board of Directors. The Board shall consist of not less than three persons and not more than 15 persons. The initial Board of Directors shall consist of three persons, hereinafter designated, who shall hold office as such until the holding of the 1997 annual meeting of the Board of Directors of the corporation, and until their successors are approved of by the current Board of Directors and the Guidance Committee.

XI

That the Board of Directors shall have the authority to create and appoint such other standing, special and auxiliary committees, to aid the Board in carrying out the activities of the corporation, as in the judgement of the Board may appear necessary or appropriate from time to time, and to define the duties and responsibilities of each such committee, subject at all times to the final authority of the Board of Directors.

XII

That the Board of Directors, at its first regular meeting following the annual meeting of the Board of Directors of the corporation in each year, shall elect or reelect a President, one or more Vice Presidents, a Secretary, and a Treasurer. Such offices shall have such powers and shall perform such duties as usually pertain to their respective offices, and as may be prescribed in the By-Laws or defined from time to time by the Board of Directors.

All such officers shall serve until the first regular meeting of the Board of Directors following the next ensuing annual meeting of the Board of Directors of the corporation, and until their respective successors shall have been elected and approved by vote of the majority of the whole number of the Board of Directors, unless otherwise specified at the time of election.

Any officer may be removed from office at any time by vote of the majority of the whole number of Directors then holding office.

Any vacancy arising in any of the offices shall be filled by election by the whole number of the Board of Directors for the unexpired term of the officer whose seat has become vacant, unless otherwise specified at the time of such election.

MAR 24 8 ... AM '97
SECRETARY OF STATE

No officer or employee of the corporation shall have the power to contract any debt or incur any obligation in the name or on behalf of the corporation, or to expend any money of the corporation, without appropriate action by the Board of Directors without the corporation granting such authority or approving such debt, obligation or expenditure.

XIII

That the initial Board of Directors of this corporation shall consist of the following named persons who shall serve until the holding of the 1997 annual meeting of the Board of Directors and until their successors shall be nominated and approved:

William D. Burbank - 4761 N. Fieldcrest Way, Boise, Idaho, 83704
Judith I. Zink - 8590 S. Cole Road, Boise, Idaho, 83709
Warren P. Burda - 2063 S. Elkhound, Meridian, Idaho, 83642

XIV

That in the event of the dissolution of the corporation, any funds and assets of the corporation shall be donated to public education entities.

XV

That the name(s) and address(es) of the incorporator(s) are:

Patricia J. Pace - 8438 S. Cole Road, Boise, Idaho 83709
Judith I. Zink - 8590 S. Cole Road, Boise, Idaho 83709
Warren P. Burda - 2063 S. Elkhound, Meridian, Idaho 83642

24 8 04 AM '97

SEC[illegible] STATE
ST[illegible]

IN WITNESS WHEREOF, We have hereunto set our hand(s) this 24 day of March, 1997.

Patricia J. Pace
Patricia J. Pace
Incorporator

Judith I. Zink
Judith I. Zink
Incorporator

Warren P. Burda
Warren P. Burda
Incorporator

State of Idaho

Office of the Secretary of State

CERTIFICATE OF EXISTENCE

OF

ANSER OF IDAHO, INC.

File Number C 118784

I, PETE T. CENARRUSA, Secretary of State of the State of Idaho, hereby certify that I am the custodian of the corporation records of this State.

I FURTHER CERTIFY That the record of this office show that the above-named non-profit corporation was incorporated under the laws of Idaho on March 24, 1997.

I FURTHER CERTIFY That the non-profit corporation is in goodstanding on the records of this office.

Dated: October 24, 2000

GREAT SEAL OF THE STATE OF IDAHO ESTO PERPETUA

Pete T Cenarrusa
SECRETARY OF STATE

By Natalie Jones

State of Idaho

Department of State

CERTIFICATE OF AMENDMENT
OF

ANSER OF IDAHO, INC.
File Number C 118784

I, PETE T. CENARRUSA, Secretary of State of the State of Idaho, hereby certify that duplicate originals of Articles of Amendment to the Articles of Incorporation of ANSER OF IDAHO, INC., duly signed pursuant to the provisions of the Idaho Nonprofit Corporation Act, have been received in this office and are found to conform to law.

ACCORDINGLY and by virtue of the authority vested in me by law, I issue this Certificate of Amendment to the Articles of Incorporation and attach hereto a duplicate original of the Articles of Amendment.

Dated: June 17, 1997

GREAT SEAL OF THE STATE OF IDAHO
ESTO PERPETUA

Pete T. Cenarrusa
SECRETARY OF STATE

By Tonya Herold

ARTICLES OF AMENDMENT
TO THE
ARTICLES OF INCORPORATION
OF
ANSER OF IDAHO, INC.

JUN 17 8 13 AM '97

SEC... STATE

Amendments and changes to the Articles of Incorporation of ANSER of Idaho, Inc. are as follows:

- Changed - Article IV
  - Was: That the said corporation is organized exclusively for educational purposes, including, for such purposes, the teaching of children.
  - Is: That the said corporation is organized exclusively for educational 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.

- Changed - Article XIV
  - Was: That in the event of the dissolution of the corporation, any funds and assets of the corporation shall be donated to public education entities.
  - Is: Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such 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 educational purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for educational purposes.

IDAHO SECRETARY OF STATE
DATE 06/17/1997
0900 103053 4
CK #: 3240 CUST# 83072
AMEND PROF 1@ 30.00= 30.00

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- Changed - Article XV

  Was: That the name(s) and address(es) of the incorporator(s) are:
  Patricia J. Pace-8438 S. Cole Rd,Boise,ID 83709
  Judith I. Zink-8590 S. Cole Rd,Boise,ID 83709
  Warren P. Burda-2063 S. Elkhound,Meridian,ID 83642

  Is: No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its officers, trustees, employees, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof. 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.

- Added - Article XVI (It is what used to be known as Article XV)

  Was: N/A

  Is: That the name(s) and address(es) of the incorporator(s) are:
  Patricia J. Pace-8438 S. Cole Rd,Boise,ID 83709
  Judith I. Zink-8590 S. Cole Rd,Boise,ID 83709
  Warren P. Burda-2063 S. Elkhound,Meridian,ID 83642

Approval of members is not required since ANSER of Idaho, Inc. does not have any members. However, the above Amendments are approved by a sufficient vote of the incorporators.

We, the undersigned, do hereby adopt the following Amendments and changes to the Articles of Incorporation of ANSER of Idaho, Inc. on this 17 day of June, 1997:

Patricia J. Pace
Officer

Judith I. Zink
Officer/Director

Warren P. Burda
Director

- Changed - Article XV

  Was: That the name(s) and address(es) of the incorporator(s) are:
  Patricia J. Pace-8438 S. Cole Rd,Boise,ID 83709
  Judith I. Zink-8590 S. Cole Rd,Boise,ID 83709
  Warren P. Burda-2063 S. Elkhound,Meridian,ID 83642

  Is: No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its officers, trustees, employees, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II hereof. 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.

- Added - Article XVI (It is what used to be known as Article XV)

  Was: N/A

  Is: That the name(s) and address(es) of the incorporator(s) are:
  Patricia J. Pace-8438 S. Cole Rd,Boise,ID 83709
  Judith I. Zink-8590 S. Cole Rd,Boise,ID 83709
  Warren P. Burda-2063 S. Elkhound,Meridian,ID 83642

Approval of members is not required since ANSER of Idaho, Inc. does not have any members. However, the above Amendments are approved by a sufficient vote of the incorporators.

We, the undersigned, do hereby adopt the following Amendments and changes to the Articles of Incorporation of ANSER of Idaho, Inc. on this 17 day of June, 1997:

Patricia J. Pace
Officer

Judith I. Zink
Officer/Director

Warren P. Burda
Director

FILED
APR 27 3 25 PM '98
SECRETARY OF STATE
STATE OF IDAHO

ARTICLES OF AMENDMENT
TO THE
ARTICLES OF INCORPORATION
OF
ANSER OF IDAHO, INC.

Amendments and changes to the Articles of Incorporation of ANSER of Idaho, Inc. are as follows:

- Changed - Article VIII

  Was: That the Board of Directors shall hold an annual meeting on the third Tuesday of June at 1 o'clock PM. All individuals or groups stated in Section VII shall be allowed to attend, with the exception of any media. The meeting shall be closed to the public.

  That at the annual meeting of the Board of Directors the agenda shall be informative and shall be chosen by the Board of Directors and shall include a set time in which the Board of Directors shall hear comments.

  Is: That the Board of Directors shall hold an annual meeting on the third Tuesday of June at 1 o'clock PM.

  That at the annual meeting of the Board of Directors the agenda shall be informative and shall be chosen by the Board of Directors and shall include a set time in which the Board of Directors shall hear comments.

Approval of members is not required since ANSER of Idaho, Inc. does not have any members. However, the above Amendments are approved by a sufficient vote of the Officers and Directors of ANSER of Idaho, Inc..

IDAHO SECRETARY OF STATE
04/28/1998 09:00
CK: 3614 CT: 83072 BH: 1050/7
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C 118784

We, the undersigned, do hereby adopt the following Amendments and changes to the Articles of Incorporation of ANSER of Idaho, Inc. on this 27th day of APRIL 1998:

W. Darrel Burbank
President/Director

Judith I. Zink
Vice-President/Director
Incorporator

Patricia J. Pace
Secretary/Treasurer
Incorporator

Warren P. Burda
Director
Incorporator

JUL 2 1 3:30 PM '98

SECRETARY OF STATE
STATE OF IDAHO

ARTICLES OF AMENDMENT
TO THE
ARTICLES OF INCORPORATION
OF
ANSER OF IDAHO, INC.

Amendments to the Articles of Incorporation of ANSER of Idaho, Inc., a non-profit organization, were voted on June 16, 1998 and passed seven (7) pro, zero (0) con. Changes are as follows:

- Changed - Article VII

  Was: That the corporation will not have members, but will have employees, volunteers, parents, and advisory committee, and additional associations, corporations, foundations, and governmental divisions or subdivisions, and etc. . ., that will ahve an interest in ANSER and will work for the overall realization and furtherance of the objects and purposes stated above in Section II (a) through (I).

  Is: That the corporation will not have members, but will have employees, volunteers, parents, and additional associations, corporations, foundations, and governmental divisions or subdivisions, and etc. . ., that will ahve an interest in ANSER and will work for the overall realization and furtherance of the objects and purposes stated above in Section II (a) through (I).

- Changed Article VIII

  Was: That the Board of Directors shall hold an annual meeting on the third Tuesday of June at 1 o'clock P.M. All individuals or groups stated in Section VII shall be allowed to attend, with the exception of any media. The meeting shall be closed to the public.
  That at the annual meeting of the Board of Directors the agenda shall be informative and shall be chosen by the Board of Directors and shall include a set time in which the Board of Directors shall hear comments.

  Is: That the Board of Directors shall hold an annual meeting prior to the opening of the school year. All individuals or groups stated in Section VII shall be allowed to attend.
  That at the annual meeting of the Board of Directors the agenda shall be informative and shall be chosen by the Board of Directors and shall include a set time in which the Board of Directors shall hear comments.

President ANSER

CERTIFICATE OF ASSUMED BUSINESS NAME

(Please type or print legibly. See instructions on reverse.)

To the SECRETARY OF STATE, STATE OF IDAHO
Pursuant to Section 53-504, Idaho Code, the undersigned gives notice of adoption of an Assumed Business Name.

EFFECTIVE
00 DEC 4 AM 10:
SECRETARY OF STATE
STATE OF IDAHO
2000 DEC 4 AM 11:15
STATE OF IDAHO

1. The assumed business name which the undersigned use(s) in the transaction of business is: Anser Charter School

2. The true name(s) and business address(es) of the entity or individual(s) doing business under the assumed business name is/are:

Name	Complete Address
Anser of Idaho, Inc	1187 W. River St
C 118784	Boise, ID 83702

3. The general type of business transacted under the assumed business name is: (mark only those that apply)

☒ School, Public Charter

☐ Retail Trade	☐ Manufacturing	☐ Transportation and Public Utilities
☐ Wholesale Trade	☐ Agriculture	☐ Finance, Insurance, and Real Estate
☒ Services	☐ Construction	☐ Mining

4. The name and address to which future correspondence should be addressed: Same as above

Phone number (optional): _____

5. Name and address for this acknowledgment copy is (if other than # 4 above):

Signature: [signature]

Printed Name: Darrel Burbank

Capacity: Executive Director

(see instruction # 8 on back of form)

Submit Certificate of Assumed Business Name and **$20.00** fee to:

Secretary of State
700 West Jefferson
Basement West
PO Box 83720
Boise ID 83720-0080
208 334-2301

Secretary of State use only

IDAHO SECRETARY OF STATE
12/04/2000 09:00
CK: 1498 CT: 137597 BH: 364476
1 @ 20.00 = 20.00 ASSUM NAME # 2

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D40967

BY-LAWS

OF

ANSER OF IDAHO, INC.

ARTICLE I
ORGANIZATION

Section 1.1. Name. The name of the corporation shall be ANSER of Idaho, Inc. (the "Corporation").

Section 1.2. Fiscal Year. The fiscal year of the Corporation shall begin on July 1 and end on June 30.

ARTICLE II
PURPOSE

Section 2.1. Purpose. The Corporation shall have a charitable education or civic purpose within the meaning of Section 501c(3) of the Internal Revenue Code of 1954, or as amended, and shall always maintain that status, more specifically to establish and oversee ANSER Charter School in Boise, Idaho (the "School") and any other educational entity established by Anser of Idaho, Inc. The Corporation shall not operate for profit and shall only make distribution of income or revenue to realize and further the objectives and purposes of the School.

ARTICLE III
MEMBERSHIP

Section 3.l. Membership. There shall be no membership in the Corporation.

ARTICLE IV
MEETINGS

Section 4.1. Compliance with Open Meeting Law. As a public entity, the Board (defined below) must comply with Idaho law regarding open meetings. All meetings of the Board shall be open to the public and all persons shall be allowed to attend any meeting except as allowed by applicable law. Notice of all meetings shall be made pursuant to law and written minutes shall be kept of all meetings pursuant to law.

Section 4.2. Annual Meeting. The annual meeting of the Board shall be held each year prior to the beginning of the school(s) fiscal year at date and a time to be determined by the Board.

Section 4.3. Regular Meetings. The Board shall meet on a regular schedule with meetings held at least quarterly.

Section 4.4. Special Meetings, Executive Sessions. Special meetings and/or executive sessions may be scheduled and notice provided as permitted by law.

ARTICLE V
ANSER BOARD

Section 5.1. Number and Composition. The Corporation shall be governed by the Board, which shall serve as the board of directors of the Corporation, and shall be comprised of at least nine (9) and not more than fifteen (15) directors of the Corporation. Board members shall include the following:

- One (1) parent representative from the Family Council, elected by the Family Council.
- Two (2) at-large parents, elected by the parent body.
- The Immediate Past President of the Board.
- Other directors as elected by a majority vote of the Board at the annual meeting.
- At least one teacher, ex officio
- Administrative staff as designated by the Board, ex officio

The Board may add board members at any regular or special board meeting by majority vote of the current directors. Any member so elected shall serve until the next annual meeting, where he/she will stand for election as other directors. The term of any director so selected may be staggered as directed by the board.

As a goal, no more than one-half (50%) of the members of the Board shall be parent, legal guardians, or legal guardians of ANSER students. No person shall represent more than one position on the Board.

Section 5.2. Purpose and Responsibilities. Members of the Board are public agents authorized by the Boise Independent School District to guide the policies and operations of the charter school(s). The Board holds the fiscal and legal responsibility for ANSER Charter School. The Board is responsible for defining, communicating, and implementing ANSER's mission and vision; selecting and evaluating the administrator(s) of the school(s); approving selection of instructional staff; fiscal sustainability; charter compliance; and assessing and evaluating school policies and actions to meet school(s) needs. The 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 the Corporation when necessary to facilitate the efficient operation thereof.

Section 5.3. Election and Term of Family Council Representative to the Board. One representative from the Family Council shall be elected by the Family Council during April or May of any year in which a vacancy occurs. The Family Council member will serve a two-year term, beginning July 1 following election to the Board, provided he/she maintains continued membership on Family Council.

Section 5.4. Election and Term of At-Large Parents to the Board. One at-large parent shall be elected by the full parent body during the Spring of any year in which there is a vacancy. The Family Council shall have the authority to create a slate of candidates and to propose the election process for at-large parent representation on the Board. The process shall allow for nominations to be made directly from the parent body and the full parent body shall know the slate of candidates no later than one (1) week prior to the scheduled election. Upon election, at-large parent members, provided their child continues enrollment at ANSER, shall serve three-year terms.

Section 5.5. Other Nominations to the Board. With the exception of Family Council and At-Large Board members, a governance committee or other committee designated by the Board ("Governance Committee") shall propose a slate of candidates to fill vacancies on the Board. Such slate of candidates will be made with the understanding that the goal for parent representation on the Board shall be no more than 50% of the Board's membership. The names of the nominees proposed by the Governance Committee shall be made known to the staff, parents and Board at least two (2) weeks prior to election. Notice may be accomplished by posting the slate of candidates in a readily accessible and visible location at the school(s).

Section 5.6. Additional Nominees. Additional nominations for election to the Board may be submitted, by any individual who is involved with the Corporation, to the Governance Committee, in writing at any time up to 1:00 pm the day prior to the annual meeting.

Section 5.7. Election and Term of the Board. Election of new directors or election of current directors to a second term, where appropriate, will occur as the first item of business at the annual meeting of the corporation. Directors will be elected by a majority vote of the current directors. With the exception of the Family Council director, each director on the Board shall serve a term of three (3) years, which terms shall begin on July 1 following election in any year.

Section 5.8. Election and Term of Officers. At the first regular meeting following the annual meeting of the Board, the Board shall elect from among its members a President, Vice-President(s), and Treasurer, each to serve a term of one (1) year.

Section 5.9. Consent to Be Board Director or Officer. Prior to having his/her name submitted by the Governance Committee, the nominee must have consented to serve on the Board or as a board officer if duly elected.

Section 5.10. Vacancies. The Governance Committee shall have the authority to nominate any qualified individual to fill any vacancy on the Board, with the exception of Family Council or parent at-large directors. The member so nominated to fulfill the vacancy, if duly elected at the next regular or special meeting, shall complete his/her predecessor's term. Family Council will have the authority to elect a qualified member to fill a vacancy on the Board for the Family Council representative. The member so elected shall complete his/her predecessor's term. For vacancies in the at-large parent position, Family Council shall announce the vacancy to the full parent body and request applications to fill the position. The Family Council shall review applications and, at the next regular Family Council meeting, elect a new member to complete his/her predecessor's term. The Board may also vote at any regular or special meeting to eliminate any vacant position except Family Council or parent at-large directors, so long as the minimum number of directors is maintained.

Section 5.11. Resignation, Removal. Resignation from the Board must be in writing and received by an officer of the Board. Any Board member may be removed for cause by a two-thirds (2/3) majority vote of the full Board.

Section 5.12. Compensation. The directors of the ANSER Board shall receive no compensation for their services.

Section 5.13. Indemnification and Insurance. The Corporation shall defend, indemnify and hold harmless each board member and officer of the Corporation (including former Board members and officers), and their heirs, administrators and assigns, against any liability or loss related to such person's actions in an official capacity as a board member or official of the Corporation; provided, however, that this paragraph shall not apply to actions for which the board member or officer is liable for intentional misconduct or gross negligence. The corporation shall purchase insurance for the corporation and the ANSER Board in order to provide this indemnification.

ARTICLE VI
OFFICERS AND DUTIES

Section 6.1. Officers. The officers of the Corporation shall be: President, Vice-President(s), and Treasurer. The immediate past president shall serve as an ex officio member of the executive committee. An administrator of the school, who serves as an ex officio member of the Board, shall be designated by the Board as the Secretary of the Corporation.

Section 6.2. Duties of the President. The President shall preside at all meetings of the Board where he/she is present. He/she shall have the responsibility of oversight of management of the business of the Corporation and shall see that all orders and resolutions of the Board are carried into effect. He/she may be one of the officers

authorized to sign checks and drafts of the organization The President shall, with the consent of two-thirds of the full Board, hire an administrator who shall act as administrator of the Corporation under the direction, management and control of the President, Executive Committee, and the Board. He/she will in general perform all duties as may be prescribed by the Board.

Section 6.3. Duties of the Vice-President(s). The duties of Vice-President will be to act in the capacity of the President in the event of the absence or inability of the President to exercise his/her office. He/she may be one of the officers authorized to sign checks and drafts of the organization.

Section 6.4. Duties of the Secretary. The Secretary of the Corporation shall attend all meetings of the Board, record all votes and the minutes of the meetings, and maintain the minutes in a book to be kept for that purpose. He/she shall give or cause to be given notice of all meetings of the Board and special meetings of the Board as required by law and shall perform such other duties as may be prescribed by the Board. The Secretary shall be the official custodian of all records of the Corporation.

Section 6.5. Duties of the Treasurer. The Treasurer shall oversee the work of the accounting staff to assure that full and accurate accounting is made of all funds belonging to the Corporation. He/she shall render to the President and members at the regular meetings of the Board, or whenever they may require it, an account of all transactions and of the financial condition of the Corporation. He/she may be one of the officers authorized to sign checks and drafts of the organization.

Section 6.6: Duties of the Immediate Past President. The Immediate Past President shall serve as an ex officio member of the executive committee providing guidance on policy and past practices of the Board. The term of the immediate past president will be one (1) year after completion of their term as president with the option of an additional year if approved by the executive committee and the Board. The immediate past president shall be a full member of the Anser Community Board.

ARTICLE VII
MANAGEMENT BY BOARD

Section 7.1. Voting. Each director shall have one vote and such votes may be cast in person or telephonically, as allowed by law. Action may also be taken by unanimous consent of the directors. Votes will be by voice at all meetings. Any member of the Board may call for a roll call vote on a specific issue. The results of a roll call vote will be recorded in the minutes.

Section 7.2. Quorum. A quorum of the Board shall be one half (50%) of the members of the Board, which quorum shall have full authority to transact business, unless such business otherwise requires the presence of the full Board as specified herein.

Section 7.3. Fiscal Affairs. The Board shall be responsible for approving the annual budget and any budget revision during the year; setting fiscal policies for the organization; monitoring compliance with fiscal policies and applicable law; assuring that an annual financial audit is conducted; and general fiscal oversight.

Section 7.4. Employees. The Board shall have the power to hire administrator(s) as needed for the efficient and effective operation of the school(s). The administrator(s) shall have the power to hire other employees for the Corporation, whose duties shall be specified by the Board. The Board shall approve the employment contracts of the administrator(s) and instructional staff.

Section 7.7. Board Conduct. Directors are prohibited from receiving a personal pecuniary benefit, directly or indirectly, pertaining to a contractual relationship with the School(s). The Board will comply with and assure that every person who serves in the School(s), either as an employee, contractor, or otherwise, must comply with the professional codes and standards approved by the State Board of Education, including standards for ethics and/or conduct. The Board and the School(s) are subject to the provisions of law governing bribery and corruption; prohibition against contracts with officers; ethics in government; open public meetings; and disclosure of public records.

ARTICLE VIII
COMMITTEES

Section 8.1. Executive Committee. The Board may appoint an Executive Committee comprised of the officers elected from the Board. Except for the power to amend the Articles of Incorporation and By-Laws, the Executive Committee shall have authority to transact the business of the Board for all actions delegated to it by the Board.

Section 8.2. Standing Committees. The Board shall establish such standing committees as the Board deems important to the efficient, effective operation of the school and shall appoint Board representatives to such standing Committees.

Section 8.3. The Board may establish and appoint members to ad hoc committees from time to time to address issues of concern to the school. Committees report to the Board and committee decisions require Board approval.

ARTICLE IX
FAMILY COUNCIL

Section 9.1. Family Council. The purpose of the Family Council shall be to provide parent input into school policies and procedures, provide an impartial voice to staff and the Board on concerns parents bring to them, conduct activities for parent education and school involvement for families, and link families to activities and volunteer opportunities within the ANSER community. The Family Council shall be comprised of

at least ten (10) members elected by and from the parent body each May. The Family Council also elects a Board member as provided herein.

ARTICLE X
DISCRIMINATION

Section 10.1. Discrimination. The School(s) shall be nonsectarian in its programs, affiliations, admission policies, employment practices, and all other operations, shall not charge tuition, levy taxes or issue bonds, and shall not discriminate against any student on any basis prohibited by the federal or state constitutions or any federal, state or local law.

ARTICLE XI
AMENDMENT TO BY-LAWS

Section 11.1. Amendments. These by-laws may be repealed or amended, or new by-laws adopted by 60% majority vote of the voting Board members at any regular meeting thereof, or by a 60% majority of any meeting especially called for that purpose.

Whenever any amendment or new by-laws are adopted, it shall be copied in the book of by-laws with the original by-laws, and immediately following them, and shall not take effect until so copied. If any provision of the by-laws is repealed, the fact or 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 by-laws 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.

The foregoing by-laws were regularly adopted by the Board on the __ day of ___, 20__, at Boise, County of Ada, Idaho.

ATTEST

Secretary

Appendix C
Board of Directors

Anser Charter School Community Board 2019-2020

The Anser Charter School Board meets on the third Tuesday of the month September-June at 6:00pm

	POSITION	2019-2020
BOARD ELECTED MEMBERS 3 yr terms	Member President	Nichoel Baird Spencer
	Member Vice President	Caitlyn Scales
	Member Treasurer	Maridee Lemieux
	Imm. Past President	Lora Breen
	Member	Leslie Brown
	Member	Staci Shaw
	Member	AnnMarie Johnson
	Member	Maggie Chase
	Member	Jeff Tonkin
	Member	Kristin Reed
	Member	Amy York
AT LARGE MEMBERS 2 yr terms	At-Large Parent	John Townsend
	Board- Family Council Representative	Amy York
EX-OFFICIO MEMBERS	Organization Director	Heather Dennis
	Education Director	Michelle Dunstan
	Clerk	Heather Dennis
	Senior Staff Advisor	Nancy Tacke

AnnMarie Johnson

2208 N. 19th Street Boise ID 83702
208-870-1309 annmarie.a.johnson@gmail.com

EDUCATION

Boise State University

- Master of Art: Criminal Justice Administration
- Bachelor of Science: Criminal Justice Administration – Law Enforcement Emphasis

EXPERIENCE

2010, January to Present — Boise State University, Department of Athletics
Assistant to Athletic Director/Special Projects

- Oversee and evaluate gender equity and compliance with Title IX for Boise State Athletics

2014, August to January 2015 — Make-A-Wish Idaho®
Interim CEO

- Oversaw two CEO transitions, assisted in revamp of fund raising strategy and overall organizational leadership

2008, January to January 2010 — Boise State University, Department of Athletics
Assistant to Athletic Director/Special Events & Projects

- Oversee and evaluate gender equity and compliance with Title IX for Boise State Athletics
- Coordinate biennial Boise State Auction benefiting athletic and academic scholarships for the Bronco Athletic Association and Boise State Alumni Association
- Coordinate Bronco Golf Series for Boise State Athletics benefitting athletic summer school scholarship program
- Coordinate Football Coaches Club membership and growth.

2006, August to 2008 May — Boise State University, Department of Criminal Justice — Boise, Idaho
Adjunct Faculty

- Instructor for Senior Seminar, Criminal Justice (CJA 498) course, Fall 2007 & Spring 2008
- Instructed Criminal Justice Theories of Law and Justice (CJA 103) course, Spring 2007
- Instructed Introduction to Criminal Justice Administration (CJA 101) course, Fall, 2006

2006, January to 2007, August — Hewlett Packard Company/Securitas Security Services — Boise, Idaho
Investigative Analyst

- Conduct data analysis on high level internal Standard of Business Conduct (SBC) allegations and external fraud investigations for Hewlett Packard Company.
- Utilize document and financial analysis programs to assist in investigative planning.
- Public speaker for federal and local law enforcement and merchants on investigative tactics in loss prevention.
- Assist in interviews and interrogations for SBC investigations.
- Coordinate and document detailed investigative processes and findings for trial or litigation preparation.
- Served as coordinator of $7 million fraud investigation originating out of West Africa.

2002, August to 2005, December — Boise State University Department of Athletics — Boise, Idaho
Academic Coordinator / CHAMPS Life Skills Program Coordinator

- Developed, supervised and coordinated comprehensive life skills program for student-athletes and staff in the areas of leadership, personal development, academic support, career development, and community outreach.
- Instructed Life Skills Leadership course for new student-athletes.
- Selected as one of 26 facilitators for NCAA National Leadership Conference, June 2005 & 2006
- Prepare budget analysis, assessment surveys, and reports to justify programming and future action plans.
- Oversaw and managed academic eligibility standards and records for student-athletes of eight athletic teams
- Coordinate 300+ student-athletes and 80 staff members for completion of 3000+ hours of community service projects in the Boise community and campus per year.
- Managed student-athlete recognition and award applications for campus, conference, and national programs.

SERVICE, ACTIVITES, HONORS and AWARDS

- Anser Charter School Community Board of Directors, June 2018-Present
- Initiative One Leadership Transformation Course, January 2019-Present
- Board of Directors Make-A-Wish Idaho, 2010-2016, Board President 2014-2016
- Co-chair of annual Make-A-Wish event, *Serving Up Wishes*
- Mentor for sixth grader of ANSER Charter school as part of *Kids for Wish Kids* program
- Big Sister and Ambassador for Big Brother/Big Sister Program, 2003-present
- Boise State Gymnastics Team 1997-2001, Three-time Conference Champion

AMY YORK

INTRO

Clear and concise communicator, flexibility as both leader and team player, innovative thinker and visionary invested in transformative solutions and strategies, bold decision-maker who works to find common ground and compromise.

OBJECTIVE

A dedicated self-starter, I am excited for opportunities that converge my passion for social justice and professional potential. An activist and organizer at heart, I have dedicated my time while growing my family to building and supporting my community.

EXPERIENCE

Executive Director | Baby Carriers Provided

May 2017-Current

As first Executive Director to a fledgling organization, I am responsible for building and maintaining all aspects of business. Grant programs, operations, fundraising, social media, marketing, finance, and contract management are all items our growing organization is building and improving upon.

Co-Owner, Operations Director | Milligan Events

2003-2010

Operations, facility, financial, and contract management as key responsibilities, in addition to the typical versatility and flexibility required of a small-business owner. Starting as an administrative assistant in 2003, I worked my way to office manager, then operations manager, and finally co-owner. Milligan Events is a corporate event management company, providing services primarily in the tech industry to Fortune 50 companies.

VOLUNTEERING

Anser Charter School | Family Council

Anser Charter School | Board of Directors

Treasure Valley Babywearers | Founder and Educator

Email

208-724-0715

LinkedIn

EDUCATION

Bachelor of Arts | 2005 | Boise State University

Major: Social Science with emphasis in Political Science and History, specifically Latin America and Eastern Europe/Balkans. Dean List three times.

Caitlyn Scales

Boise, ID
630.207.5607
caitlyn.scales@gmail.com
www.linkedin.com/in/caitlynscales

To seek professional opportunities that contribute to the strategic growth and development of a mission driven organization.

Education

PhD, Cultural Studies and Social Thought in Education
Washington State University (Pullman, WA)
MAY 2019

M.S. Literacy, Culture, and Language Education
Indiana University Bloomington (Bloomington, IN)
MAY 2009

B.S. Secondary Education in English/ELL
Indiana University Bloomington (Bloomington, IN)
DECEMBER 2007

Experience

JULY 2018 - PRESENT
Director of Strategy and Development / **One Stone (Boise, ID)**

- Development and implementation of organizational sustainability efforts.
- Manages national partnerships to achieve impact goals.
- Works collaboratively with team members to meet and exceed organizational goals.
- Design, coordination, and execution of: monetization of programming, research and design efforts, impact analysis, reaching financial goals through philanthropy and grants, and forging sustainable pathways to maintain tuition-free status for all One Stone program offerings.

FEBRUARY 2018 - PRESENT
Owner, Strategic Consultant / **Up the Scales (Boise, ID)**

- Provides services to enhance the strategy and development of organizations in the field of business and education.

JANUARY 2015 – FEBRUARY 2018
School Growth Coordinator / **Athlos Academies (Boise, ID)**

- Development and implementation of departmental processes for company growth in the field of School Choice and Education Management.
- Manages both local and remote teams to achieve growth goals.
- Project management for growth and partnership opportunities nationally to implement multi-million dollar partnerships.

- Design, coordination, and execution of: strategy, grassroots efforts, politicking efforts, formation and training for 501c3 governance, and formation of 501c3 entities nationally.
- Lead representative of company for any interested or potential partnership opportunity (connecting groups and individuals, building and maintaining long-term relationships, and travelling 70% of the time.
- Development and implementation of network-wide English Language Learner program with professional development and leadership design and execution on multiple campuses.

JANUARY 2015 – PRESENT

Adjunct Professor / **Boise State University (Boise, ID)**

- Instructor for undergraduate students in Curriculum, Instruction, and Foundational Studies department as well as Literacy, Language, and Culture department. Currently teaching *Foundations of Education* and *ELL Methods and Pedagogy*.
- Mentored undergraduate students to prepare for their admission interview to the teacher prep program.

AUGUST 2011 – JUNE 2014

Instructor / **Washington State University (Pullman, WA)**

- Taught *Culture and Community Contexts in Education; Diversity, Classroom Life, and Management;* and *ELL/Special Education Methods for Secondary Teachers* to both undergraduate and graduate students in the Department of Teaching and Learning.
- Coached and mentored pre-service teachers during their student teaching with Field Placement Services.
- Ran the Challenge Course programming through University Recreation.

AUGUST 2010 – AUGUST 2011

Freelance English Instruction / **(Jaco, Costa Rica)**

- Worked with locally owned eco-tourism groups to provide English skills for growth in a customer base.

JANUARY 2008 – MAY 2010

Teacher/ELL Dept. Leader / **Andress High School (El Paso, TX)**

- Developed and implemented 9th grade character development program and taught 10th and 12th grade English/Language Arts.
- Lead the ELL department on campus and taught Intermediate and Advanced ELL courses.
- Coached teachers using Pearson's SIOP model and facilitated staff trainings for literacy and language development.

JANUARY 2004– JUNE 2007

Membership Services / **Monroe County YMCA (Bloomington, IN)**

MAY 2001– AUGUST 2006

Camp Counselor and Coordinator / **Camp Tecumseh YMCA (Brookston, IN)**

Skills

Project manager, connector of people, builder of relationships, strategist, innovator, collaborator, facilitator and coach of professional development, traveler, ambassador of unique start-up work, quick learner with a growth mindset, Spanish speaker.

Activities

- The Three O'Clock Project, Board President (www.threeoclockproject.org)
- Anser Charter School, Board Member
- Global Talent Idaho, Volunteer

References

Available upon request.

Heather

PROFESSIONAL PROFILE

I am a non-profit Administrator with 8+ years of experience seeking to use my skills and dedication in support of the growing the impact of Anser Charter School's education model by bringing it to more students in the Treasure Valley. With my strong collaborative skills I seek to develop the members of my team, seek out opportunities to connect with and learn from my colleagues and inspire a team focus on the mission of the organization that ensures persistence, effectiveness and accountability.

208.602.0503

1heatherdennis@gmail.com

2711 N. 26th St

Boise, ID 83702

KEY SKILLS

Non-Profit Leadership

Non-Profit Governance

Community Engagement

Leading Change

Organization Development

Stakeholder Communication

EDUCATION

B.S. Developmental Psychology
University of Kansas
Lawrence, Kansas
1993

Trained Habitudes Facilitator

EL Education Leadership Institute Participant

WORK EXPERIENCE

Organization Director
Anser Charter School / Garden City, ID / 2010 – Present

Co-Director of Boise's first charter school, responsible for managing all aspects of Finance, Human Resources, Administrative Operations, Facilities, IT, Governance, Marketing, Enrollment, Volunteer Development, Fundraising, Food Service and paid programs.

- Worked collaboratively with faculty to lead change initiatives in areas of program effectiveness, academic achievement and long-term planning.
- Developed the annual $3 million operating budget to support program objectives and ensure long term financial health of the organization.
- Supervised all financial processes including payroll, accounts payable and receivable, reserve analysis, and financial reporting to the Anser Board.
- Implemented all HR functions including recruitment, compensation, performance evaluation, personnel file management and staff training.
- Supervised all financial, administrative, custodial and food service staff.
- Recruited and trained volunteers for fundraising and community development.
- Served as Board Clerk, including preparing agendas, taking and posting minutes, retreat planning and preparing all documents for Board Meetings.
- Led effective and successful fundraising campaigns each year to raise additional funds for school programs.
- Led annual construction and remodeling projects totaling over $800,000 to improve the function of the school building.

Administrative Associate- Community Organizer Genealogy Project
Center for Community Change / Boise, ID / 2007-2010

Managed logistical support for a project to track the development of community organizing in the US and provided support to CCC's Leadership Development team.

- Filmed, edited and posted videos of interviews with community organizers
- Documented the organizing "lineage" of organizers across many sectors
- Organized all travel and interview logistics.
- Identified retreat locations around the US for Leadership Development retreats.
- Managed retreat center and lodging details for retreats.

Heather

ADDITIONAL SKILLS

Volunteer Development

Board Clerk

Grant Writing

Non-Profit Fund Development

Project/Process Management

Retreat and Event Planning

ACCOMPLISHMENTS

Strategic Budgeting

Led Anser through 4 years of recession era school funding while maintaining all student programs.

Focus on Sustainability

Increased Anser's reserve fund balance from $400,000 to over $800,000 to ensure long term sustainability of the organization.

Change Leadership

Led numerous change processes, including change to core education programs to increase STEM, reorganization of grade levels to support academic achievement, and the Visioning work for the future of the organization.

Program Manager
Community Living Opportunities / Lawrence, KS / 1993-1995

Directed the staff and activities of a workshop to develop work skills for adults with developmental disabilities

- Recruited and Managed teaching staff
- Developed the budget for various programs
- Worked with community partners to develop work opportunities for clients.
- Developed and implemented a new staffing structure that provided more direct service time to clients.

VOLUNTEER EXPERIENCE

Garden City Comprehensive Plan Review Committee, 2018

Representing education interests within a group of Garden City stakeholders to review the current Garden City Comprehensive plan, written in 2006 and suggest revisions, updates and additions to the Garden City Council. Taking part in public meetings to seek input from Garden City community members on the Comprehensive plan.

Family Council President-Anser Charter School 2006-2009

Led Anser's parent group by building a large, engaged parent community to support fundraising, teacher needs and maintaining Anser's culture. At the request of the Anser Board my term was extended and I recruited and managed parents in donating over 12,000 volunteer remodeling hours when Anser's new building was acquired.

Board President- Boise Cooperative Preschool 2002-2005

Served as President of one of Boise's longest running, non-profit preschools. Duties included leading board meetings, hiring, and evaluating the teaching staff, overseeing management of the school, and identifying, acquiring and remodeling a new location for the preschool.

REFERENCES

Gary Sandusky
Retired Director of Organizing
Center for Community Change
1536 U. St. Washington D.C.
208.484.6062
garysand@gmail.com

Dave Wagers
Owner
Idaho Candy Company
Anser Board President 2012-2014
412 S. 8th St Boise, ID
208.631.5009
dave@idahospud.com

Steven Reames
Director Ada County Medical Society
305 W. Jefferson St.
Boise, ID
208.490-7664
thereames@gmail.com

Jeffrey Alan Tonkin

2480 N. Edgewood Rd ♦ Eagle, ID 83616 ♦ (208) 371-5911 Phone
JTonkin@hcco-inc.com

EDUCATION

Boise State University *1998-2003*
DEGREE: BACHELOR OF SCIENCE
MAJOR: CONSTRUCTION MANAGEMENT
MINOR: BUSINESS MANAGEMENT

WORK EXPERIENCE

HC Company, Inc. *2009 - Present*
Title: Project Manager

PRIMARY RESPONSIBILITIES:

PROJECT MANAGER: PERFORM ALL ASPECTS OF PROJECT MANAGEMENT FOR COMMERCIAL CONSTRUCTION PROJECTS INCLUDING BUT NOT LIMITED TO: ESTIMATING, PROJECT COORDINATION, MEP COORDINATION, CONTRACTING/BUYOUT, SCHEDULING, BUDGET CONTROL, AP/AR, AND FIELD SUPERVISION, OWNER RELATIONS AND NEGOTIATIONS

MANAGING MEMBER: MANAGE OFFICE STAFF AND FIELD STAFF HIRING AND TERMINATIONS, COORDINATION WITH ACCOUNTING DEPARTMENT, EMPLOYEE ENGAGEMENT COMMITTEE AND TRAINING OF OTHER PROJECT MANAGERS AND PROJECT ENGINEERS

Engineered Structures, Inc. *2008 – 2009*
TITLE: PROJECT MANAGER

PRIMARY RESPONSIBILITIES:

PROJECT MANAGEMENT, INCLUDING ESTIMATING, PROJECT COORDINATION, MEP COORDINATION, CONTRACTING/BUYOUT, SCHEDULING, BUDGET CONTROL, AP/AR, AND FIELD SUPERVISION

Banner/Sabey II, LLC. *2006 – 2008*
TITLE: LEAD PROJECT ENGINEER

PRIMARY RESPONSIBILITIES:

COORDINATE WITH OWNER AND OAC MEETINGS, BUYOUT AND SUBCONTRACTOR/VENDOR COORDINATION, PROJECT ACCOUNTS PAYABLE AND RECEIVABLES, SUBMITTAL REVIEW AND COORDINATION, MANAGER OF PROJECT TEAM, QA/QC, CLOSEOUT, AND COST CONTROL/FORCASTING

Engineered Structures, Inc. *2003 – 2006*
TITLE: PROJECT ENGINEER / SUPERINTENDENT

PRIMARY RESPONSIBILITIES:

COORDINATE WITH OWNER AND OAC MEETINGS, BUYOUT AND SUBCONTRACTOR/VENDOR COORDINATION, PROJECT ACCOUNTS PAYABLE AND RECEIVABLES, SUBMITTAL REVIEW AND COORDINATION, MANAGER OF PROJECT TEAM, QA/QC, CLOSEOUT, AND COST CONTROL/FORCASTING, MANAGEMENT OF ON SITE ACTIVITIES.

VOLUNTEER :

ANSER CHARTER SCHOOL BOARD OF DIRECTORS	AUG 2018 – PRESENT
TREASURE VALLEY YMCA BOARD OF DIRECTORS	JUNE 2016 – PRESENT
WEST VALLEY YMCA ADVISORY COMMITTEE	JUNE 2014 - PRESENT
WEST VALLEY YMCA MAJOR GIFTS COMMITTEE	SEPT 2016 – PRESENT
WEST VALLEY YMCA ANNUAL GIVING CAMPAIGN CHAIR	APRIL 2015 – AUG 2015
YMCA SERVICE TO YOUTH AWARD RECIPIENT	2019

John Townsend

Process-oriented, data-driven business professional with 14 years' experience in client-facing and technical roles. Currently the Sr. Manager of Client Services for VisitPay – a leader in patient billing solutions for the US healthcare provider market. Proven track record of delivering results using relationship management skills and strong emotional intelligence. Passionate about taking on new challenges and solving complex problems by distilling the underlying issues to their simplest forms. Long term goal is to drive positive change in the health of others in partnership with organizations focused on solving the biggest problems in healthcare.

Professional Experience

VisitPay • Boise, Idaho — **2017 – Current**

Sr. Manager of Client Services

Responsibilities

- Own relationships with large-scale ($2B+) health systems at the senior level including support of enterprise implementation and driving ongoing revenue cycle performance and patient experience
- Achieve revenue, platform adoption and client satisfaction targets
- Manage and develop account managers

Healthwise • Boise, Idaho — **2015 – 2017**

Sr. Client Contracting Manager – Business Enablement Team

Responsibilities

- Bring sales deals to closure by communicating sales and business needs directly to internal legal team and ensuring accuracy of contract business terms.
- Lead contract negotiations, for complex technology licensing agreements to large healthcare providers and payers.

Packaging Corporation of America (PCA) • Boise, Idaho — **2013 – 2015**

Sr. Buyer - Corporate Purchasing

Responsibilities

- Manage strategic supplier performance through scorecard system and surveying plant-level procurement groups.
- Negotiate contracts for capital equipment, MRO, and environmental services categories ($60MM annual spend).
- Perform in-depth data analysis to identify TCO reduction opportunities. Execute on opportunities through RFP solicitation, purchasing negotiation, and supplier consolidation.

JH Technologies, Inc. • Boise, Idaho — **2010 – 2013**

Sales Account Manager

Responsibilities

- Provide optics, imaging, and software-based solutions to clinical, research, industrial, university, and forensics markets in Idaho, Montana, and Eastern Washington.
- Cultivate and manage client relationships by owning all aspects of the sales cycle including the initial sale, ongoing support, issue resolution, training, and upsells.
- Develop client roadmaps to inform annual quota budgets and territory planning.

Micron Technology, Inc. • **Boise, Idaho** — **2006 – 2009**

Process Engineer - Plasma Etch Team

Responsibilities

- Own process engineering and equipment maintenance responsibilities for plasma etch toolset in a fast-paced manufacturing environment.
- Use statistical data analysis methods such as statistical process control (SPC), regression analysis, and design of experiments (DOE) to establish root-cause of process deviations and develop new process controls.

Georgia-Pacific Corp. • **Green Bay, Wisconsin** — **2005 – 2006**

Process Engineer

Responsibilities

- Provide engineering and technical support for mill improvement projects and daily paper mill operations including power generation, pulping, paper making, base sheet converting, and legal and environmental compliance.

Education

Boise State University • **Boise, Idaho** — **2010**

Master of Business Administration

Graduated with 3.9/4.0 GPA

2010 College of Business and Economics Student Spotlight Award Recipient

University of Idaho • **Moscow, Idaho** — **2005**

B.S. Chemical Engineering — **Graduation Date: May 2005**

Vice President - TAPPI Student Chapter

Lora Rainey Breen

1703 W Hill Rd, Boise, ID 83702 | (208) 387-2667 | breen@bvwcomplaw.com

Career History

Partner, *Breen Veltman Wilson PLLC, Boise, ID* — *Present*

Martindale-Hubbell: rated AV Preeminent
Defend workers' compensation claims throughout all stages of litigation

Senior Partner, *Gardner, Breen & Veltman, Boise ,ID* — *August 2007 - August 2012*

Practice law with an emphasis on workers' compensation cases and the representation of employers and insurance carriers

Referee, *Idaho Industrial Commission, Boise, ID* — *June 1993- July 2007*

Perform all aspects of adjudicating cases related to workers' compensation, Crime Victims Compensation Program appeals, and unemployment appeals including pre-hearing procedures, status conferences, ruling on motions, conducting hearings within circuits throughout the state, researching applicable law, and writing decisions (Findings of Fact and Conclusions of Law) for review by the Commission. In addition, conduct mediations in workers' compensation cases

Staff Judge Advocate, *Idaho Army National Guard* — *March 1997- June 2004 and November 2005-Present*

Supervise and manage the Brigade Legal Office, perform military legal duties as required (legal assistance, military justice actions and reviews, administrative law tasks, etc.), assign cases among staff attorneys, and act as primary legal advisor to the Brigade command element

Deputy Staff Judge Advocate, *U.S. Army, 116th Brigade Combat Team* — *June 2004- November 2005*

Activated in support of Operation Iraqi Freedom III and stationed in Kirkuk, Iraq. Supervised legal staff of ten (10) officer and enlisted personnel; acted as primary administrative law officer (legal review of official investigations); assigned as Detention Review Authority for base detention facility; reviewed military justice (UCMJ) appeals; assigned as a foreign claims commission; provided legal assistance to soldiers; and, performed other legal work as required

Extern, *Supreme Court of the State of Idaho, The Honorable Stephen Bistline, Boise, ID* — *Summer 1991*

Drafted Opinions and prepared bench memoranda

Education Activities & Honors

Workers' Compensation College, *Arizona State University, Tempe, AZ* — *May 1999*
Regents Award, Best Judicial Paper

National Judicial College, *University of Nevada, Reno, NV* — *1995-1997*
Faculty Assistant, Civil Mediation Program (1997); Completed: Civil Mediation Program (1996) and Administrative Law, Workers' Compensation Program (1995)

University of San Diego School of Law, *J.D., San Diego, CA* — *1994*

University of Redlands, B.A., Political Science and Economics, Redlands, CA — *1988*
Honors: *Magna Cum Laude*, Presidential Scholar, Phi Beta Kappa, Dean's List

Military

Rank: Colonel

Awards: Army Achievement Medal (1998); Army Service Ribbon (1999); Army Reserve Components Overseas Training Ribbon (2002); Idaho Service Ribbon (2003); Army Commendation Medal (2003); Army Reserve Components Achievement Medal (2003); Armed Forces Reserve Medal with M Device (2005); Global War on Terrorism Service Medal (2005); Iraq Campaign Medal (2005); Combat Action Badge (2005); Bronze Star Medal (2007); Meritorious Service Medal (2014)

Volunteer

- Board Member/President, Anser Charter School Board of Directors	*2010-present*
- Board Member/President, Idaho Legal Aid Services Board of Directors	*2007-present*
- *Pro Tem* Judge, Ada County Youth Court	*2007-2013*
- Denise O'Donnell-Day Pro Bono Award Recipient	*2007*
- Attorney/Arbitrator, Idaho State Bar Fee Arbitration Program	*1994-1998*
- Volunteer, Idaho Volunteer Lawyers Program	*1992-2012*

Professional Memberships and Certifications

- Idaho Women Lawyers	*Present*
- Member, American Inns of Court	*2007-Present*
- Idaho Industrial Commission Certified Workers' Compensation Specialist, Distinguished Graduate	*2002*

LESLIE S BROWN

ATTORNEY

CONTACT

5346 E Branchwood Dr

208-921-5747

Lsbrown328@gmail.com

EDUCATION

JURIS DOCTORATE

McGeorge School of Law
1994-1997

BACHELOR OF ARTS,
Economics, Foreign Language
International Affairs

University of Puget Sound
1988-1992

ADMITTED TO PRACTICE

- Idaho Supreme Court
- United States District Court for the District of Idaho
- 9th Circuit Court of Appeals

REFERENCES AVAILABLE UPON REQUEST

LEGAL WORK EXPERIENCE

PARTNER, PERKINS, MITCHELL, POPE & MCALLISTER

2010-2018 (Associate, 1998-2010, formerly Quane Smith, LLP and Carey Perkins, LLP)

Partner in one of Idaho's premier insurance defense firms with primary emphasis in the area of professional malpractice litigation, specializing in medical, dental, and nursing home defense. Experience in other areas of litigation such as personal injury, construction, bankruptcy and civil rights. Appeared at jury trials and mediations, worked on appeals before the Idaho Supreme Court and 9th Circuit Court of Appeals. Handled detailed pretrial reporting to clients and numerous substantive and procedural motions and depositions. Independently prepared all aspects of trial preparation, including factual investigation, drafting and answering discovery requests, conducting research and drafting trial briefing, and managing clients and expert witnesses. Experienced in client development. Drafted firm Employee Manual.

VOLUNTEER EXPERIENCE

IDAHO STATE BAR / LAW FOUNDATION

- Fee Arbitration Member – current
- Idaho Women Lawyers Member - current
- Unauthorized Practice of Law Committee – former
- Continuing Legal Education Committee – former

UNIVERSITY OF PUGET SOUND

- President Alumni Council – 2014-2017
- Ex officio member Board of Trustees – 2014-2017
- Presidential Search Committee - 2015
- Vice President Alumni Council – 2008-2014

ANSER CHARTER SCHOOL

- Board Member – Current -Revised Employee Handbook

RECOGNITION

- AV Preeminent Peer-Review Rated
- Super Lawyer Rising Star 2008 - 2010

MARGARET (Maggie) E. CHASE
1910 University Drive
#507 College of Education, MS1745
Boise, Idaho 83725
208-426-3206
maggiechase@boisestate.edu

EDUCATION

Ph.D.	April, 2000 Indiana University	Major: Language Education Minor: Library Science
M.L.S.	August, 1979 Indiana University	Masters in Library Science Endorsement as School Library Media Specialist
B.A.	May, 1975 DePauw University	Major: English (Literature) Minor: Education

PROFESSIONAL EXPERIENCE

2018	**Consultant,** Idaho Charter School Commission
July, 2018	**Retired, Emeritus**
2015 - 2018	**Associate Professor & Department Chair, Director of The Literacy Center & Program Director - Department of Literacy, Language & Culture,** College of Education, Boise State University, Boise, ID
2014	**Associate Professor & Associate Chair, Department of Literacy, Language & Culture,** College of Education, Boise State University, Boise, ID
2011 – present	**Associate Professor, Department of Literacy,** College of Education, Boise State University, Boise, ID
2006 - 2011	**Assistant Professor, Department of Literacy,** College of Education, Boise State University, Boise, ID
2005	**Director of Professional Services & Educational Training Specialist**, Lee Pesky Learning Center, Boise, ID
2003-2005	**Director of School Operations** and **Leader of Management Team** Foothills School of Arts and Sciences, Boise, ID
1992 - 2003	**2-3 Teacher and Pre-K - 3 Team Leader** Foothills School of Arts and Sciences Dr. Susan Medlin, Director
Summer, 1991	**Teacher,** Boise State University Continuing Education *Using Children's Literature across the Curriculum*
1990	**Teaching Internship,** Indiana University

Advanced Study in the Teaching of Reading in Elementary Schools (with Carolyn Burke)

1988 - 1989 **Conference Coordinator,** *I.U. Fall Language Arts Conference* and *I.U. Summer Reading Conference,* Indiana University.

1982 - 1988 **School Library Media Specialist and Reading Teacher**
South Elementary School, New Canaan, CT 06840
Dr. Russell Firlik, Principal

1980- 1988 **Reference Librarian,** Part-time
Greenwich Public Library, Greenwich, CT 06830
Noel Lushington, Director

1980 -1982 **School Library Media Specialist and Grade Five Teacher**
Greenwich Public Schools, Greenwich, CT 06830
Dominic Butera, Principal

1979 - 1980 **Library Consultant to United Parcel Service Corporate Headquarters, Legal Department**
Greenwich Office Park, Greenwich, CT 06830
Ed Reitman, Attorney and Project Coordinator

Summer 1976; Summer 1987 **Bookmobile Librarian**
Greencastle-Putnam County Library, Greencastle, IN 46135
Ellen Sedlack, Director

RESEARCH EXPERIENCE

2017 – present **Research Project:** *1st Graders' Writing Progression through Weekly Buddy Journal Correspondence* Co-Investigators: Jess McGinnis, ANSER Charter School & Dr. Eun Hye Son, BSU

2012 **Research Project:** *How Young Children Make Sense of Graphic Novels*. Co-Investigators: Stan Steiner & Eun Hye Son.

2011-2012 **Research Project:** *Modeling Reflective Practice.* An investigation into student perceptions and recognition of professors' reflective practice. Co-Investigator: Bruce Robbins

2009-2010 **Research Project**: *Teachers and students writing together: Questioning our motives and examining our effectiveness.* An investigation into the pedagogical practice of sharing our personal writing with students in our writing instruction courses.

2009 **Research Project:** *Once and future classics: reading between the lines; Reading between the generations*. An investigation of the similarities and differences between 5th/6th graders' and adults' impressions of six "classic" children's books.

2008-2009 **Research Project:** *Deconstruction, dissonance, and discourse: pedagogical practices in a reading methods course.* A focused investigation of students' understandings at the conclusion of a reading methods course

2006-present **Research Project:** *The Language of Revision*: *A Closer Look at the Revision Process at the Kindergarten Level*. A qualitative, year-long ethnographic study of the culture in a school and classroom that emphasizes "best work" and "exemplary models."

1992 - 1998 **Dissertation:** *Bridging the Expanse: A Case Study of Literature Discussion with a Cross-Age, Cross-Ability Group of Elementary Students.* A close look at the reading dynamics of a small group of children, ages 6 - 11.

1990 **Research Team Member:** *Teachers' Ways of Knowing*, an investigation of the epistemology of teachers. Dr. Jerome Harste, Principle Investigator.

1989 - 1990 **Research Assistant:** *Portfolio Assessment of Reading Comprehension.* Dr. Roger Farr, Principal Investigator.

1989 - 1990 **Evaluation Team:** Evaluation of the Lilly Foundation's *Project REAP*, a statewide reading motivation program in public schools. Dr. Shirley Fitzgibbons, Principal Investigator.

PUBLICATIONS: REFEREED

Son, E.S., Chase, M. (2018). Books that Bring People Together - Rich Discussions and Engagements. *School Library Journal, 64*(18), (pp.34-38).

Son, E.S., Chase, M. (2018). Books for two voices: Fluency practice with beginning readers. *The Reading Teacher*, *72*(2), (p233-240).

Son, E.S., Chase, M. & Steiner, S. (under review). Books that bring people together- Rich discussions and engagement, Part 2. *The Reading Teacher.*

Panauo, P. Son, E.S., Chase, M. & Steiner, S. Beginning readers' interest in animal books (under review). *Journal of Literary Education*.

Chase, M., Son, E.H. (2014). Creating a scene with text sets. In Litt, D., Martin, S., & Place, N.(Eds.), *Literacy teacher education: Principles and effective practices, (*pp.147 – 156).

Chase, M. (2014). Wut clr du u lick? University students correspond with primary children. In Litt, D., Martin, S., & Place, N. (Eds.), *Promising Practices in Literacy Teacher Education.*

Chase, M. E., Son, E., & Steiner, S. F. (2014). Children's Choices through the Years: Some Surprising Choices Results. *Dragon Lode*, *33*(1).

Chase, M. E., Son, E., & Steiner, S. F. (2014). Sequencing and Graphic Novels with Primary Grade Students. *The Reading Teacher*, *67*(6), pp. 435-443.

Robbins, B. & Chase, M. (2012). Modeling reflective practice. In L. Erickson, S. Pinnegar, & J. Young (Eds.), *Extending Inquiry Communities: Illuminating Teacher Education through Self-Study.* Ninth International Conference on Self Study of Teacher Education Provo, UT: Brigham Young University, 72-74.

Chase, M. (2012). Revision process and practice: A kindergarten experience. *Language Arts 89*(3), 166-168.

Martin, S. D., Chase, M., Cahill, M., & Gregory, A. (2011). Minding the gate: Challenges of high-stakes assessment and literacy preparation of elementary teachers. *The New Educator*, *7*(4), 352-370.

Martin, S., Chase, M. (2010). Sharing our writing with students: Examining tensions and questioning our motives. In L. Erickson, S. Pinnegar, & J. Young (Eds.), *Navigating the public and private: Negotiating the diverse landscape of teacher education.* Eighth International Conference on Self-study of Teacher Education Practices. Provo, UT: Brigham Young University, 156 - 159.

Martin, S. & Chase, M. (Fall/Winter 2009). Beyond the test: Writing-to-a-prompt as a unit of study. *InLand: A Journal for Teachers of English Language Arts, 28(*1), 6-9.

Chase, M. (2008). The warp and the weft: Using mentor texts to weave together reading, science, writing, and art. *Journal of Children's Literature 34(*2), 60 - 67.

Steiner, S., Nash, C., & Chase, M. (2008). Multicultural literature that brings people together. *The Reading Teacher 62*(1), 88 – 92.

Robbins, B. & Chase, M. (2007). The D & D boys: What's wrong with this picture? *InLand: A Journal for Teachers of English Language Arts, 27*(1), 10-14.

Chase, M. (2006). PRAXIS practice test items oversimplify reading issues. *The New Educator, 2*(4), 331-334.

PUBLICATIONS: OTHER OR INVITED

Steiner, S., Chase, M., Son, E.H. (2011). Multicultural literature, literally! *Book Links*, *20*(2), 32 -35.

Chase, M., Son, E.H., Steiner, S. (2010). A dozen great books: Taking action in the face of adversity. *Journal of Children's Literature 36*(2).

Price-Dennis, D., Beierle, M., Chase, M., Son, E.H., and Wissman, J. (2010). Children's Literature Reviews: Books that set their own standards. *Language Arts, 87*(5), 400-404.

Chase, M. (March, 2008). Web links: online ideas for using children's literature. A newsletter from Idaho Council of International Reading Association, *6*(3), p. 5.

Ware, J. (2008). Here comes the new teacher. *Treasure Valley Family Magazine 15*(10), 24 - 26. (This article is based on an interview with me; my quotations are used throughout)

Chase, M. (2007). Testimonials from BSU faculty who have attended Boot Camp for Profs, a written reflection on BSU's Center for Teaching and Learning web site. http://ctl.boisestate.edu/default.asp?page=39

PUBLISED BOOK REVIEWS*

2019

Chase, M. (2019). Review of the book *Birth of the Cool: How Jazz Great Miles Davis Found His Sound* by Kathleen Cornell Berman. *School Library Journal. (65)*3, p. 93.

Chase, M. (2019). Review of the book *Guitar Genius: How Les Paul Engineered the Solid-Body Electric Guitar and Rocked the World. School Library Journal. (65)*2, p. 129.

2018

Chase, M. (2018). Review of the book *A Child's introduction to African American history: The experience, people, and events that shaped our country* by Jabari Asim. *School Library Journal. (63*)8, p. 118-119.

Chase, M. (2018). Review of the book *Gloria takes a stand: How Gloria Steinem listened, wrote, and changed the world* by Jessica Rinker. *School Library Journal. (64*)12, p. 90.

Chase, M. (2018). Review of the book *Marie Curie* by Demi. *School Library Journal. (64*)4, p. 142.

Chase, M. (2018). Review of the book *Robin Boid* by Maree Coote. *School Library Journal. (64*)7, p. 50.

2017

Chase, M. (2017). Review of the book *Awesome minds: The creators of the iPhone* by Marne Ventura. *School Library Journal. (63)*4, p. 168.

Chase, M. (2017). Review of the book *Curious Constructions: A peculiar portfolio of fifty fascinating structures* by Michael Hearst. Chronicle Books. *School Library Journal. (63)*6, p. 121-122.

Chase, M. (2017). Review of the book *Fairy Floss: The sweet story of cotton candy* by by Ann Ingalls. Simon & Schuster. *School Library Journal. (63)*3, p. 160.

Chase, M. (2017). Review of the book *Mr. Crum's potato predicament* by Anne Renaud. Illustrated by Felicita Sala *School Library Journal. (63*)8, p. 118-119.

Chase, M. (2017). Review of the book *Noah Webster's fighting words* by Tracy Maurer. Millbrook Press. *School Library Journal. (63)*2, p. 119-120.

Chase, M. (2017). Review of the book *Song of the wild: A first book of animals* by Nicola Davies. *School Library Journal. (63*)10, p. 122.

2016

Chase, M. (2016). Review of the book, *Every breath we take: A book about air* by Maya Ajmera. Charlesbridge, 2016. *School Library Journal. (62*)4, p. 177.

Chase, M. (2016). Review of the book, *Faraway fox* by Jolene Thompson. HMH, 2016. *School Library Journal. (62*)7, p. 58-61.

Chase, M. (In Press). Review of the books, *The moon* and *The planets* by Gemma McMullen. Book Life, 2016. *School Library Journal.*

Chase, M. (2016). Review of the book, *Please be nice to sharks: Fascinating facts about the ocean's most misunderstood creatures* by Matt Weiss. *School Library Journal. (62*)6, p. 128.

Chase, M. (2016). Review of the book, *Seasons of the bear: A Yosemite story* by Ginger Wadsworth. *School Library Journal. (62*)8, p. 127-128.

Chase, M. (2016). Review of the book, *Strange trees: And the stories behind them* by Bernadette Porquié, 2016. *School Library Journal. (62)*4, p. 182.

Chase, M. (In press). Review of the book, *13 skyscrapers children should know* by Brad Finger. *School Library Journal.*

Chase, M. (In press). Review of the book, *The Three Musketeers* by Bénédicte Rivière. *School Library Journal.*

Chase, M. (2016). Review of the book, *When Grandma Gatewood took a hike* by Michelle Houts. *School Library Journal. (62)*9, p. 176.

2015

Chase, M. (2015). Review of the book, *Racing the waves* by Brian Neubecker. *School Library Journal. (61)*1, p. 83.

Chase, M. (2015). Review of the book, *Look back!* by Trish Cooke . *School Library Journal. (61)*3, p. 114-115.

Chase, M. (2015). Review of the book, *Peace, bugs and understanding: An adventure in sibling harmony* by Gail Silver. *School Library Journal. (61)*4.

Chase, M. (2015). Review of the book, *The adventures of blue ocean bob: A challenging job* by Brooks Olbrys. *School Library Journal. (61)*4.

Chase, M. (2015). Review of the book,. *The blue whale* by Jenni Desmond. *School Library Journal. (61)*5, p. 130.

Chase, M. (2015). Review of the book, *The sky painter: Louis Fuentes, bird artist* by Margarita Engle. *School Library Journal. (61)*5, p. 132.

Chase, M. (2015). Review of the book, *The world in a second* by Isobel Minhos Martins. *School Library Journal. (61)*5, p. 88.

Chase, M. (2015). Review of the book, *Can we help? Kids volunteering to help their communities* by George Ancona. *School Library Journal. (61)*8, p. 117.

Chase, M. (2015). Review of the book, *A tower of giraffes: Animals in groups* by Anna Wright. *School Library Journal. (61)*9, p. 185.

Chase, M. (2015). Review of the book, *Polar regions* by Cathryn Sill. *School Library Journal. (61)*9, p. 181.

Chase, M. (2015). Review of the book, *Just like me, climbing a tree: Exploring trees around the world* by Durga Yael Bernhard. *School Library Journal. (61)*9, p. 178.

Chase, M. (2015). Review of the book, *Creaturepedia* by Adrienne Barman. *School Library Journal. (61)*11, p. 128.

Chase, M. (2015). Review of the books, *Just because I am: A child's book of affirmations* and

We can get along: A child's book of choices by Lauren Murphey Payne. *School Library Journal. (61)*12, p. 138.

2014

Chase, M. (2014). Review of the book, *This is the greatest place!* by Brian Tse. *School Library Journal. (60)*12, p. 114.

Chase, M. (2014). Review of the book, *Fly Guy's amazing tricks* by Tedd Arnold. *School Library Journal. (60)*12, p. 94.

Chase, M. (2014). Review of the book, *Hello, I'm Johnny Cash* by G. Neri. *School Library Journal. (60)*9, p. 162.

Chase, M. (2014). Review of the book, *P is for pirate: A pirate alphabet* by Eve Bunting. *School Library Journal. (60)*9, p. 111.

Chase, M. (2014). Review of the book, *Star stuff: Carl Sagan and the mysteries of the cosmos* by Stephanie Sisson.

Chase, M. (2014). Review of the book, *Strongheart: The world's first movie star dog* by Emily Arnold McCully. *School Library Journal. (60)*9, p. 161.

Chase, M. (2014). Review of the books, *I am Abraham Lincoln/I am Amelia Earhart* by Brad Meltzer. *School Library Journal, (60)*4, p181.

Chase, M. (2014). Review of the book, *Mr. Wayne's masterpiece* by Patricia Polacco. *School Library Journal, (60)*7, p73.

Chase, M. (2014). Review of the book, *Remy and Lulu* by Kevin Hawkes. *School Library Journal, (60)*7, p 69.

Chase, M. (2014). Review of the book, *There was an old sailor* by Claire Saxby. *School Library Journal, (60)*5, p93.

Chase, M. (2014). Review of the book, *Thomas Jefferson: A day at Monticello.* by Elizabeth Chew. *School Library Journal, (60)*4, p185.

Chase, M. (2014). Review of the book, *The Wing Wing brothers geometry palooza!* by Ethan Long. *School Library Journal, (60)*5, p148.

2013

Chase, M. (2013). Review of the book, *Ancient animals: Terror bird* by Andrew Plant. *School Library Journal, (59)*9, p180.

Chase, M. (2013). Review of the series, Good Question!, which includes, *What was your dream, Dr. King?: And other questions about Martin Luther King Jr.*, by Mary Kay Carson and *Why did the whole world go to war?: And other questions about World War II,* by Martin W. Sandler. *School Library Journal, (59)*5, p132.

Chase, M. (2013). Review of the book, *Lola goes to work: A nine-to-five therapy dog* by Marcia Goldman. *School Library Journal, (59)* 9, p120.

Chase, M. (2013). Review of the book, *Rosie Revere, engineer* by Andrea Beaty. *School Library Journal, (59)*9, p114.

Chase, M. (2013). Review of the series, Polar Animals: Life in the Freezer, which includes, *Arctic foxes, Beluga whales, and Snowy owls,* all by Ruth Owen. *School Library Journal, (59)*7, p110.

Chase, M. (2013). Review of the series, Rookie Read about Safety, which includes, *Back-to-School safety*, *Bicycle safety*, and *Car safety* by Lisa M. Herrington. *School Library Journal, (59)*3, p139.

2012*

*Though I have provided the *Children's Literature Comprehensive Database* URL, where applicable, one must go through the BSU Albertson Library's databases to access them.

Chase, M. (2012). Review of the book, *Sherlock Holmes and the adventure of Black Pete,* adapted by Murray Shaw & M.J. Cosson. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of the book, *Lunch lady and the field trip fiasco* by Jarrett Krosoczka. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of the book, *Orcs: Forged for war* by Stan Nicholls. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of the book, *In search of the fog zombie: A mystery about matter* by Lynda Beauregard. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of the book, *Explorer: The mystery boxes* edited by Kazu Kibuishi. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of the book, *Pandemonium* by Chris Wooding and Cassandra Diaz. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2012). Review of Native American Library series, including: *Mohawk history and culture; Navajo history and culture;* and *Nez Perce history and culture* by Helen Dwyer and Sierra Adare. *School Library Journal*, *58*(9), p.162.

Chase, M. (2012). Review of the book, *Nora the mind reader* by Orit Gidali. *School Library Journal*, *58*(11), p.72-76.

Chase, M. (2012). Review of the book, *The peanut pickle* by Jessica Jacobs. *School Library Journal*, *58*(11), p. 76.

Chase, M. (2012). Review of the book, *Daisy's perfect world* by Sandra Feder. *School Library Journal*, *58*(4), p. 132.

Chase, M. (2012). Review of the "Let's Talk" series, including: *The tale of the teeny, tiny black ant: Helping children learn persistence* by Teresa Allen and *Joni and the fallen star: Helping children learn teamwork* by Cindy Pilo. *School Library Journal*, *58*(2), p. 82.

Chase, M. (2012). Review of the book, *Tim and the iceberg* by Paul Coates. *School Library Journal*, *58*(2), p. 84.

Chase, M. (2012). Review of the "Counting Bugs, 1-2-3" series, including: *Counting bees 1-2-3, Counting Ants 1-2-3,* and *Counting Butterflies 1-2-3* by Brian Enslow. *School Library Journal*, *58*(2), p. 101.

2011

Chase, M. (2011). Review of the book, *Anton can do magic* by Ole Koennecke. *School Library Journal*, *57*(10), p.110.

Chase, M. (2011). Review of the book, *The boss baby* by Marla Frazee. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, Erica S. *Chicken Butt's Back!* by Erica Perl. *School Library Journal*, *57*(5), p.86.

Chase, M. (2011). Review of the book, *Doodleday* by Ross Collins. *School Library Journal*, *57*(5), p.74.

Chase, M. (2011). Review of the book, *Emma dilemma : big sister poems* by Kristine O'Connell George. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *The Fabulous Flying Machines of Alberto Santos-Dumon* by Victoria Griffith. *School Library Journal*, *57*(9), p.134-135.

Chase, M. (2011). Review of the book, *Follow the Line to School* by Laura Ljungkvist. *School Library Journal*, *57*(7), p.70.

Chase, M. (2011). Review of the book, *Fraser Bear: A Cub's Life* by Maggie De Vries. *School Library Journal*, *57*(3), p.141-142.

Chase, M. (2011). Review of the book, *Ghost Hands: A Story Inspired by Patagonia's Cave of the Hands* by T. A. Barron. *School Library Journal*, *57*(8), p.68.

Chase, M. (2011). Review of the book, *The Gingerbread Man Loose in the School* by Laura Murray. *School Library Journal*, *57*(8), p.81.

Chase, M. (2011). Review of the book, *Jack London's The call of the wild*, adapted by Lisa Mullarkey. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *Lipman Pike : America's first home run king* by Richard Michelson. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *Lots and Lots of Coins*, by Margarette S. Reid. *School Library Journal, 57*(3), p145-145.

Chase, M. (2011). Review of the book, *Maggie's Second Chance* by Nancy Furstinger. *School Library Journal, 57*(8), p.73.

Chase, M. (2011). Review of the book, *Manners Mash-Up: A Goofy Guide to Good Behavior*, by Tedd Arnold and others. *School Library Journal, 57*(3), p. 140.

Chase, M. (2011). Review of the book, *Marching with Aunt Susan: Susan B. Anthony and the Fight for Women's Suffrage* by Claire Murphy. *School Library Journal, 57*(9), p.126.

Chase, M. (2011). Review of the book, *Migrant* by Maxine Trottier. *School Library Journal, 57*(5), p.90.

Chase, M. (2011). Review of the book, *Millicent and Meer* by Richard Byrne. *School Library Journal, 57*(8), p.70.

Chase, M. (2011). Review of the book, *Over in Australia : amazing animals Down Under* by Marianne Berkes. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *Rapunzel and the seven dwarfs : a Maynard Moose tale* by Willy Claflin. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *Stink and the ultimate thumb-wrestling smackdown* by Megan McDonald. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *Ten little beasties* by Rebecca Emberly. *School Library Journal, 57*(10), p1o4-106.

Chase, M. (2011). Review of the book, *Thelonious Mouse* by Orel Protopopescu. *School Library Journal, 57*(8), p.82.

Chase, M. (2011). Review of the book, *Three strikes for Rotten Ralph* by Jack Gantos. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2011). Review of the book, *What to expect when you're expecting joeys: A guide for Marsupial parents (and curious kids)* by Bridget Heos. *School Library Journal, 57*(10), p.127.

Chase, M. (2011). Review of the book, *Who has what? All about girls' bodies and boys' bodies* by Robie Harris. *School Library Journal, 57*(10), p.126.

Chase, M. (2011). Review of the book, *Zia* by Scott O'Dell. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

2010

Chase, M. (2010). Review of the book *Benny and Penny in the Toy Breaker* by G. Hayes. *School Library Journal, 56* (7), p.60.

Chase, M. (2010). Review of the book *Boo, bunny!* by K.Galbraith. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Cats sleep anywhere* by E. Farjeon. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Finding Danny* by L. Glass. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book *Island of the blue dolphin, 50th anniversary edition* by S.O'Dell. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book *Little Valerie wants to grow taller* by E.Dawson. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book *Mahtab's story* by L. Gleeson. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Martha speaks: Martha on the case.* Adaptation by J. White. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M.(2010). Review of the book *Mog and the V.E.T.* by J. Kerr. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book *Monsters vs. aliens: Meet the monsters* Adapted by N.T. Raymond. *Children's Literature Comprehensive Database,* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *My choices make me who I am* by D. Vision and M. Vision. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *She sang promise: The story of Betty Mae Jumper: Seminole tribal leader* by J. Annino. *School Library Journal, 56* (4), p.143.

Chase, M. (2010). Review of the book, *A Star on the Hollywood Walk of Fame* by B. Woods. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Tales of the madmen underground: an historical romance 1973* by J. Barnes. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Tess's tree* by J.Brallier. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M.(2010). Review of the book, *Walt Disney: His life in pictures*. Edited by R. Schroeder. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2010). Review of the book, *Where is Catkin?* by J. Paschkis. *School Library Journal, 56* (4), p. 134.

2009

Chase, M. (2009). Review of the book *Christmas magic* by L. Thompson. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Cold skin* by S. Herrick. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Diseases in history: Flu* by K. Cunningham. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Hate list* by J. Brown. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *How it happens at the ice cream factory* by S. Shofner. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Hurricanes : The science behind killer storms* by A Silverstein, V. Silverstein, & L. Silverstein Nunn. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Joseph Bruchac: An author kids love* by M. Parker-Rock. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Make way for Dyamonde Daniel* by N. Grimes. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *The Nutcracker and the king of mice* adapted by W. Maysen. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Paul Robeson* by E.Greenfield. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *The people and Josh Wilson* by J. Reid. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *The picture history of great explorers* by G. Clements. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *The return of the homework machine* by D. Gutman. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Sail! Can you command a sea voyage?* By J. Bruce. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Some of Tim's stories* by S.E. Hinton. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Starring Lorenzo and Einstein too* by M. Karlins. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Storm scientist: careers chasing severe weather* by T. R. Gaffney. *Children's Literature Comprehensive Database* http://clcd.odyssi.com/member/csearch.htm

Chase, M. (2009). Review of the book *Tornadoes: The science behind terrible twisters* by A Silverstein, V. Silverstein, & L. Silverstein Nunn. *Children's Literature Comprehensive Database*, http://clcd.odyssi.com/member/csearch.htm

PRESENTATIONS

International

Chase, M. E. with Robbins, B. W. 65th Annual Conference: Literacy, Equity, Imagination, "Modeling Reflective Practice," Literacy Research Association, San Diego. December 4, 2015.

Chase, M. E. with Martin, S. 65th Annual Conference: Literacy, Equity, Imagination, "Sharing Our Writing with Students: Examining Tensions and Questioning Our Motives," Literacy Research Association, San Diego. December 4, 2015.

Chase, M. E. with P. Panaou, E.H. Son & S. Steiner. Children's Favourite Childhood Constructs: Identifying Patterns in Children's Choices Award-Winning Narratives (2005-2014). A paper presented at the International Research Society for Children's Literature. August 10, 2015.

Chase, M. E. Using technology to respond to children's literature. An In-Session paper presentation within Promising Practices in Literacy Teacher Education: Researchers of Writing Teacher Education Link Research to Practice. Literacy Research Association – Marco Island, FL, December 5, 2014.

Chase, M. E. with E.H. Son. Young children's meaning making processes with primary graphic novels (PGNs). Presentation.. Literacy Research Association – Marco Island, FL, December 5, 2014.

Chase, M. E. Drafting art and artful drafting. Roundtable Discussion Leader. NCTE Annual Convention, NCTE Annual Convention. Washington, D.C. November 20, 2014.

Chase, M. E with E.H. Son. Young children's meaning making processes with primary graphic novels (PGNs).

Chase, M. E with B. Robbins. Modeling reflective practice. Presentation at the AERA Self-Study of Teacher Education Practices Conference, Herstmonceux, England, August 18, 2012.

Chase, M. E with S. Steiner & E.H. Son. Graphic Novels and Primary Readers: What Sense Do Primary Children Make of the Graphic Novel Format? The 10th Annual *Hawaii International Conference* on *Education*, January 7, 2012.

Chase, M. E. with S. Martin. Sharing our writing with students: Examining tensions and questioning our motives. Presentation at the AERA Self-Study of Teacher Education Practices Conference, Herstmonceux, England, August 4, 2010.

National

Chase, M. E. Using technology to respond to children's literature. An In-Session paper presentation within Promising Practices in Literacy Teacher Education: Researchers of Writing Teacher Education Link Research to Practice. Literacy Research Association – Marco Island, FL, December 5, 2014.

Chase, M. E . Drafting art and artful drafting. Roundtable Discussion Leader. NCTE Annual Convention, NCTE Annual Convention. Washington, D.C. November 20, 2014.

Chase, M. E. Reflecting on writing and revision, an in-session paper presentation within Promising Practices in Literacy Teacher Education: Researchers of Writing Teacher Education Link Research to Practice. Literacy Research Association - Dallas, TX, December 4, 2013.

Chase, M. E. with M. Dunstan. Using art and words to represent Idaho native American tribes. Session: Igniting Literacy Via the Arts. Roundtable Discussion Leader. NCTE Annual Convention, Las Vegas, NV. November 17, 2012.

Chase, M. E. Approaching revision through visual, verbal, and written responses to literature. Presentation at the NCTE Annual Convention, Orlando, FL, November 20, 2010.

Chase, M. E . Once and future classics: Reading between the lines, reading between the generations. Presentation at the NCTE Annual Convention, Philadelphia, PA, November 20, 2009.

Chase, M. E .with S. Martin., A. Gregory & M. Cahill. Demonstrating, discussing, and doing literacy: Students' perspectives on pedagogical practices in an early literacy methods course. National Reading Conference, Orlando, Florida, December 5, 2008.

Chase, M. E. Kindergartners use art processes to understand features of birds. Coalition on Arts and Literacy, National Council of Teachers of English, San Antonio, Texas, November 22, 2008.

Chase, M. E. Revision in kindergarten? You've *got* to be kidding! NCTE National Convention, New York City, November 17, 2007.

Chase, M. E. The warp and the weft: Weaving the literacies of science, art, reading, and writing. NCTE National Convention, New York City, November 16, 2007.

Co-Presenter: Teachers' notions of literacy: Conversation, possibilities, and change. Joint presentation with other graduate students; Jerome Harste, principal investigator. *NCTE Spring Conference,* Indianapolis, IN, March 15, 1991.

Co-Presenter: Assessing Reading Comprehension Wholistically. Joint presentation with other graduate students; Jerome Harste, principal investigator. National Reading Conference, Austin, TX, December 1, 1989.

Learning to recognize words and *Building comprehension through fiction*, two videos in which I was a featured teacher; *HBJ Staff Development Series Video Workshops: Reading,* 1989.

Regional/Local

Chase, M. & Gregg, S.G. Early Literacy Workshop. Treasure Valley Headstart, March 18, 2018.

Chase, M. Son, E.H., & Steiner, S. Using Wordless Books to Promote Oral and Written Language. Presentation at the annual Idaho Association for Bilingual Education, January 26, 2018.

Chase, M. E., The Science of Learning & Education, "The Convergence of Imaginative Play, Literacy and Kindergarten Common Core Language Arts Standards," NMERA, Boise, ID, 2016.

Chase, M. E. with S. Steiner. Idaho Elementary & Secondary Education Act Conference, "Multicultural Literature: Needed & Relevant Today More Than Ever," The Grove Conference Center, Boise. April 16 & 17, 2015.

Chase, M. E., Teaching Assistant Training Workshops, "High Engagement Strategies," Center for Teaching & Learning, CTL -ILL. August 17, 2015.

Chase, M. E. with S. Steiner. What's new in children's non-fiction tradebooks? Presentation at ICTM/ISTA/ICIRA Fall Conference: Let's Put the Pieces of Idaho Core Together. October 3, 2014.

Chase, M. E. with B. Robbins. Getting quality revision from student writers. NCTE Regional Conference, National Council Teachers of English/Oregon Council of English, Portland, Oregon, March 2, 2014.

Chase, M. E. Education in Belize. Presented at the Winter/Spring ICIRA Leadership Meeting. March 8, 2014.

Chase, M. TBL and ED-LTCY 340: A Perfect Marriage or Co-Dependency? A poster session presented at a Boise State University CTL session, May 10, 2013.

Chase, M. E. Putting the fun in fluency. Presentation/workshop to the Oregon Trail Reading Council. February 22, 2010.

Chase, M. E. A picture is worth a thousand words: Using wordless picture books to enhance oral and written language. Presentation at ICIRA/ICTE Fall Conference: *A Season of Change: The Art of Literacy,* October 2, 2009.

Chase, M. E. Getting started in the classroom. A presentation workshop to high school seniors about to begin practicum in elementary schools, Wood River High School, September 21, 2009.

Chase, M. E. Setting the hook: Choosing the right lead for your story. A presentation at the Utah-So. Idaho chapter of Society of Children's Book Writers and Illustrators' 2009 Boise conference, *Literature Is My Utopia Conference,* September 12, 2009.

Chase, M. E. with C. Lane: Early Literacy - Later Success. Rotary Club of Nampa, Idaho, March 24, 2009.

Chase, M. E. with E.H. Son: Whose voice is it: Conversations about race, power, and control. Presentation with Eun Hye Son at the annual *Mexican American Studies Conference*, Nampa, Idaho, March 6.

Chase, M. E. What faculty want and need from a department chair: an informal survey. A presentation prepared for new department chair training, BSU, August 5, 2008.

Chase, M. E. Science and literacy: Integrating writing into the science classroom. A workshop for elementary teachers attending the Discovery Center's weeklong *Science and Literacy Summer Conference,* July 20, 2006.

Chase, M. E. with D. Blakeslee: Literature circles in the primary classroom. *Boise State University 4th Annual Reading Education Conference,* July 26, 1996.

Chase, M. E. with D. Blakeslee: Literature circles in the primary classroom. Northwest Regional NCTE Conference, Boise, ID, April 9, 1993.

Chase, M. E. Getting beyond the literal: learning to ask thought-provoking questions for literature discussions. Boise State University 3rd Annual Reading Education Conference, August 6, 1992.

Chase, M. E. Kids are storytellers too! Indiana University Summer Reading Conference, Indianapolis, IN, June 21, 1990.

Chase, M. E. with J. Harste & C. Burke: Whole language and the media center. Association of Indiana Media Educators, Indianapolis, IN, March 16, 1990.

Chase, M. E. Whole language and basals: Are they compatible? Macmillan Publishing Company, Philadelphia, Pennsylvania, February 22, 1989.

Chase, M. E. What Is whole language and what does it mean for you? Series of workshops for Stark Elementary School, Stamford, Connecticut, June 8 and June 15, 1988.

Chase, M. E. Big books for young learners. Connecticut Conference on Early Childhood, May 4, 1988.

GRANTS

Internal – Received

- Capital Educators Foundation for the Sumer Literacy Academy - $5250
- Service Learning Course Development Grant - $300, January 2009
- Active Learning Mini-Grant - $500, December, 2006
- Sponsored by the Center for Teaching and Learning to attend "Boot Camp for Profs," June, 2007

Internal – Not Funded

Martin, S., Cahill, M., Chase, M, Dubert, L., Son, E.H. *Creating Professional Digital Handbooks of Instructional Practices to Enhance Beginning Teacher Development.* Submitted to the Idaho Technology Incentive Program, Spring, 2010.

Martin, S.,Cahill, M., Chase, M., Dubert, L., Gregory, A., Son, E.H. *Creating Literacy Instruction Handbooks across Preservice Methods Courses.* Submitted to the Designing for Learning Success grant program, Boise State University, Fall, 2009.

SERVICE

National

- Editorial Review Board for *Language Arts*, 2015 - present
- International Reading Association – Appointment to the Dina Feitelson & Albert J. Harris Research Awards Committee, 2014 – 2015

- Book Reviewer for Publisher, Holcomb-Hathaway -- *Striking a Balance: A Comprehensive Approach to Early Literacy*, May 2014 - July 2014.

- International Reading Association – Appointment to Classroom Teacher Awards & Professional Development Grants Committee, 2010 - present
- Member of NCTE Commission on Arts and Literacy, 2006 - present
- Professors Advisory Panel, Scholastic Books, 2008 – 2010
- Reviewer, *Children's Comprehensive Literature Database* 2009 - 2012
- Reviewer, *School Library Journal,* 2010 - Present

University

- Foundation Scholars Award Committee, COE Representative, Spring, 2014
- BSU Employee Giving Campaign Committee, COE Representative, Fall 2009 – Spring 2011
- Board Member, BSU Children's Center, 2008-2010
- Coordinator, Korean Delegation for Conference on the Education of Gifted and Talented Students in the United States, June 5 – June 15, 2008
- Served as panel member for new Department Chair training, August 5, 2008
- Posed as "Professor with a teaching problem to be solved" in interviewing process with candidate for Center for Teaching and Learning, March 11, 2008

College

- Hiring Committee, COE Dean, Fall, 2013-Spring 2014
- COE Curriculum Committee, 2011 – present
- Selection Committee, Lee Pesky Inspirational Teaching Award, 2011 - present
- Co-Chair, BSU Scholarship Committee, College of Education, 2011-present
- COE Clinical Experience Committee, 2012
- BSU Scholarship Committee Member, College of Education, 2008 – 2011
- Literacy Department representative to CIFS Curriculum Mapping Committee, Fall 2009 – Spring 2010
- Participated in luncheon/workshop with area principals to discuss, critique, and improve school partnerships, March 14, 2008
- College of Education Technology Committee, Fall 06 – Spring 07
- Idaho State Curricular Materials (textbooks) Selection Committee member, 2007 – 2012 (a five-year appointment)
- Co-hosted 25 teachers from Jeollabok-do Province, South Korea for ten days. This included organizing presenters, travel, housing accommodations, cultural events, entertainment, and sight-seeing, June 5 – 15, 2008

Department

- Curriculum Change representative, 2011 - present
- COE Committee for Mapping the Curriculum, Fall 2009 – Spring, 2010
- Revision of Department Handbook, Fall, 2009
- Member of the search committee, Fall 2007-Spring 2008
- Committee member, revision of MA – Reading program, Fall 2007 – Spring 2008.
- Proctored ICLA exams, Spring 2007 – Spring 2009

State/Regional/Local

- Chair, Continuous Improvement Committee, Anser Charter School, 2017-2019
- Board Member, Anser Charter School, 2014 – 2019
- Committee member, Idaho Higher Education Literacy Partnership (IHELP) 2013-present
- Board Member, Idaho Leadership Team for Juvenile Diabetes Research Foundation (JDRF) 2013 – present
- Emcee, JDRF Walk for Diabetes Awards Luncheon. August 8, 2014.
- Education Committee Chair, Anser Charter School, 2014 – 2017.
- Hiring Committee for Education Director, Anser Charter School, May - November
- Committee Member, Treasure Valley Education Partnership (TVEP), June 2013 – present
- Editor, *Reading Matters*, an ICIRA 2x-yearly newsletter, 2011 - present
- President, Idaho Council of the International Reading Association 2011 - 2012
- President-Elect, Idaho Council of the International Reading Association 2010 - 2011
- Frank Church High School Parent Advisory Board, 2009 - 2010
- Parent respondent to the Title 1 audit for the Frank Church High School, December 8, 2009
- Parent representative to the Idaho Commission on Libraries' Boise School District presentation and workshop on the importance of school libraries, December 15, 2009
- Co-Sponsor, ED-LTCY 594 Literature Is My Utopia: A Conference for Readers and Writers
- First Book Advisory Board, 2008 - 2009
- Education Program Audit/Annual Report for ANSER Charter School, Fall, 2008 & 2009
- "Kids Read the Same Book" Committee, 2006-2009
- In-Service, *Finding Your Direction,* a team-building/skill-building workshop for ANSER Charter School, August21, 2008
- Treasurer, Registrar, & Planning Committee for ICIRA/ICTE Fall Conferences, "A Season of Change: the Art of Literacy," October 1-2, 2009; "Walk the Talk: Literacy Teachers in Action," October 2-3, 2008; "Life, Literacy, and the Pursuit of Knowing," October 4-5, 2007.
- Idaho State Curricular Materials (textbooks) Selection Committee member, 2007 – 2012 (a five-year appointment)
- "Let's Talk About It" Program Scholar in the *We Are What We Eat* reading series (text: Abu-Jaber's *The Language of Baklava*). Sponsored by the Idaho Humanities Council and the Idaho Commission for Libraries. 2007 – 2008
- "Let's Talk About It" Program Scholar in the *Not for Children Only* reading series (texts: Opies' *Classic Fairy Tales* and Paterson's *Bridge to Terabithia)*. Sponsored by the Idaho Humanities Council and the Idaho Commission for Libraries. January and March, 2007
- Writing Facilitator, Boise Public Schools Young Writers' Conference. February, 2007
- Board of Directors, Family Advocate Program, Diane Ingersoll, Director. 1992 – 1997
- Member of National Council of Teachers of English Committee to Review Video Tapes and Films for In-service Material, Boise, ID. Dr. Lynn Meeks, Chair. 1994

- Story Selection Committee, *Parents and Children Together*, an audio journal published by Parent Outreach Project, Indiana University. 1989 – 1990
- Vice-President, New Canaan Education Association, CT. 1987 - 1988
- Representative, New Canaan Education Association, CT. 1986 - 1987
- Coordinator and Facilitator, "Parent Seminars on Teenage Sexuality." Junior League of Greenwich, CT. 1986 - 1987
- Chairperson, "On the Rocks," a series of seminars for the community about alcoholism. Co-sponsored by The Junior League of Greenwich and The Greenwich Alcoholism Council. 1985 -1986

International

- Board member, Makindu Vocational School, Makindu, Kenya. 2019.

Maridee Lemieux

(208) 921-2362

maridee.lemieux@gmail.com

Skill Highlights

- Extensive project management skills
- Excellent analytical, troubleshooting, and problem-solving skills
- Well-developed organizational and planning skills
- In-depth knowledge of accounting and business processes
- Collaborative work style enabling effective interaction with all levels of the organization as well as internal and external customers
- Strong communication and interpersonal skills

Professional Experience

Agri Beef Co, Boise ID

IT Project Manager (2013 - present)

Responsible for managing enterprise-wide implementation of the Microsoft Dynamics AX 2012 ERP system, including: Analyzing business needs and operating procedures to determine system requirements. Managing external IT consulting services. Coordinating on-shore and off-shore IT development resources. Planning, documenting, and implementing system-wide testing procedures. Providing documentation and training on system functionality. Troubleshooting system issues and providing user support for in-house developed software. Supervising business analysts, report developer, and database administrator.

Livestock Business Analyst (2010-2013)

Conducted analysis of current business practices and possible business opportunities for the Livestock Division. Provided monthly management report, including financial and operational metrics.

Livestock System Analyst (2002-2010)

Served as liaison between the Livestock Division and IT Department during the development and implementation of the in-house developed Cattle Management System. Documented, tested and created training for all new software features rolled out to Livestock Division sites. Provided customer support and system troubleshooting. Managed the initiative to obtain ISO/HAACP certification for all Agri Beef feedlots.

Accountant II (1997-2002)

Prepared monthly financial statements, reviewed recorded financial transactions, and approved daily electronic payments. Provided support and mentorship to livestock accounting clerks. Updated monthly management reports.

Accountant I (1997)
Recorded financial transactions, reconciled account balances, reviewed daily payment reports for accuracy, and generated monthly financial reports.

Deloitte & Touche, Boise ID

Auditor (1996-1997)

Education

Bachelor of Science, Accounting – University of Idaho (1996)

Bachelor of Science, Civil Engineering – University of Idaho (1996)

Honors and Awards

Bob Rebholtz in Excellence Award
Nominated by co-workers and awarded based on performance, contribution to long-term objectives, and consistently demonstrating the Agri Beef core values of Integrity, Leadership and Innovation.

The Spirit of Lionism
For exemplary leadership and outstanding service to Lions International in Multiple District 39 Idaho/Eastern Oregon while serving on the Council Cabinet as Multiple District Youth Chair.

Community Service

Anser Charter School Community Board (member since 2013)
Treasurer, Finance Committee Chair, Executive Committee Member

Lions Clubs International (member since 1999)
Multiple District Youth Exchange Coordinator, District Cabinet Member, Club Vice President

Nichoel R. Baird Spencer, MCRP, AICP
1609 E. Bergeson. Boise, ID 83706
(208) 941-7351. nichoelbs@msn.com

Experience

2004-current — **City of Eagle** — **Eagle, ID**
Planner III — **660 E. Civic Lane**

- Lead/Manage City's comprehensive plan & updates- Public involvement, branding, contract management, staff management.
- Lead Planner for the City's first City-wide capital improvements plan.
- Grant management – Local, regional, and federal funding applications.
- Facilitate and conduct various community and elected official outreach meetings related to City management, planning, and land use issues.
- Work with City Engineer on city water system planning & expansion plan.
- Lead Planner on City's Parks Development and Recreation and Public Purposes Act application to the Bureau of Land Management.
- Lead Planner for area of city impact amendments and negotiations with Ada County.
- Responsible for annual demographic & economic forecasts for the City.
- Responsible for large (3,000+ acre) planned unit development/entitlement applications, development agreements, and permitting (M3, Avimor, Connelly).
- Review and prepare zoning code amendments.
- Manage outside/consultant staff (economists, habitat specialists, engineers and designers) including work plan development, request for proposals, contract development, and project management.
- Prepare, Coordinate, and facilitate the P&Z Department's annual budget and work program (includes project development and prioritization, staff assignments, and cost estimation).
- Project manager for Hill Road, Plaza Drive, Dry Creek Trail, Eagle Road Ped Bike Bridge West Eagle Park, Charlie Woods Park, and Aikens Street Improvements.
- Represent City on the following regional committees:
  Air Quality Board, COMPASS Board, Demographic Advisory Committee, Regional Technical Advisory Committee, Hwy 20/26 & Hwy 44 Corridor Study, Blueprint for Good Growth Committee, Ada County Highway District Transportation Land Use Integration Plan, Northwest Foothills Transportation Study, Association of Idaho Cities Legislative Advisory Committee, BLM Four Rivers Management Plan, COMPASS-Communities in Motion Long Range Transportation Plan Committee, State Street TOD Study.
- Serve as the acting Planning & Zoning Administrator in his absence.

2008-2011 — **NBS Consulting** — **Boise, ID**
Planner/Owner — **Independent Contractor**

- Independent contractor for City of Harrison, Idaho, one member of three-person planning/legal team.
- Review of comprehensive plan amendment, annexation and rezone applications for 1,800-acre second home/resort community on Lake Coeur d'Alene.
- Drafted City's Planned Unit Development and Mixed-Use Zoning Ordinances.
- Work with Special Counsel and applicant on Development Agreement.
- Work with Mayor and City Clerk on public hearing/noticing requirements.
- Primary responsibility for staff report preparation and public hearing presentations.

2000–2004 — **Ada County Development Services** — **Boise, ID**
Planner II — **200 W. Front Street**

- Managed County comprehensive plan.
- Prepared and processed zoning ordinance amendments.
- Staff liaison to the Ada County Historic Preservation Council.
- Prepared and administered grant applications.
- Worked with 5 Ada County Cities to detail long-range land use and facilities plans.
- Prepared buildable lands analysis for Areas of City Impacts for Cities in Ada County.
- Represented the County on Demographic Advisory Committee, DEQ Air Shed Advisory Committee, Hwy 16 Corridor Study, Payette River Scenic Byway Committee, Hwy 55 Study, Certified Local Government Program.

1998-2000 **City of Monroe** **Monroe, WA**

Assistant & Associate Planner **620 W. Main Street**

- Managed City's Growth Management Act duties.
- Managed and processed annual comprehensive plan amendments.
- Prepared and processed zoning ordinance amendments.
- Subdivision review and compliance.
- Drafted North Area Sub-Area Plan, over 300 acres of annexed property.
- Prepared State Environmental Impact Study documents.
- Presented to the Puget Sound Growth Management Hearing Board.
- Represented city on Snohomish County Tomorrow Board (County Growth Management Board).

1996-1998 **Clintonville Area Commission** **Columbus, OH**

Graduate Planning Intern (paid position) **62 Orchard Lane**

- Completed infrastructure surveys
- Staffed conditional use & variance hearings
- Drafted grant applications
- Prepared Zoning Overlay District for consideration by the City of Columbus, OH

Education

1996–1998 **The Ohio State University** **Columbus, OH**

- MCRP, Masters of City and Regional Planning, March 1998
- Received Commendation for Clear Creek Watershed Analysis, 1998
- City and Regional Planning Students Association, President 1997-1998
- Conducted community outreach and drafted the first City of Pataskala Comprehensive Plan (1997)

1991-1995 **Boise State University** **Boise, ID**

- B.S., Political Science Governmental Systems, December 1995
- Boise State Ambassador 1993-1995, President 1994-1995
- Student Union Board of Governors 1993-1994
- Boise State University Alumni Director Selection Committee 1994
- Alpha Chi Omega Sorority 1993-1995
- President Driscoll Hall 1992-1993

Organizations/Training/ Awards

American Planning Association, Member since 1995
American Institute of Certified Planners since 2002
ANSER Community Board (School Board) 2012-current
ANSER Charter School Vice President of Board
ANSER Charter School Finance Committee
Anser Charter School Governance Chair
Beautiful Savior Lutheran Church:
Board of Trustees/Sunday School Teacher
Boise Star Garnets & Little Explorers 4-H Club
Idaho Business Review, 2019 Woman of the Year Honoree
Idaho Chapter of American Planning Association, Region 3 Coordinator 2000-2008
Idaho Planning Association- Recipient of Outstanding Plan of the Year 2005
Idaho Rush Soccer, Coach U7 & U8 Girls, 2006-2010
National Trust of Historic Preservation, Member since 2000
Supervisor Training Class, Boise State University, 45 Credits Earned
Treasure Valley Habitat for Humanity Volunteer
Northwest Community Development Institute (Presenter) 2012 to current

Staci C. Shaw

1118 East Jefferson
Boise, Idaho 83712

(208) 283-9048
stacishaw@cableone.net

PROFESSIONAL SUMMARY

- Consultant, early literacy outreach and programming
- Innovative educator, preK – 6th grade students
- Adjunct professor, Elementary Education
- Instructional guide, preservice and inservice teachers

Specific areas of experience include: Family literacy, early learning, early literacy outreach, summer learning, project management, community engagement, differentiated instruction, reaching students and families "at-risk," program evaluation, grant management, budget management, community partnerships, collective impact, university partnerships, inquiry-based learning, charter schools, professional development, cultural awareness, resource development,

POSITIONS

2008 – present: *Projects Coordinator/Consultant, Idaho Commission for Libraries*

Develop and coordinate early literacy outreach programs. Develop and disseminate early literacy information materials to librarians, parents, child care providers, teachers, and non-profit organizations. Provide professional development training to librarians, teachers, and child care providers. Award grant monies and oversee funded projects. Write and publish newsletters for youth services librarians and parents. Consult with public and school library staff to meet diverse needs and increase the number of children entering kindergarten "ready to learn."

2009: *Adjunct Professor, Boise State University*

Taught three-credit literacy course for senior level education majors, "Content Area Language Arts, K-8"

2006 – 2008: *Education Specialist, Lee Pesky Learning Center*

- Provided one-one remediation in mathematics, reading and writing for students with learning disabilities, ages 5-16.
- Professional Development Trainer for Inservice Teachers. Collaborated with Boise State's "Developing Mathematical Thinking" project and worked with 45 teachers in three schools to analyze and support improvement of their mathematical teaching strategies. Revised tool for measuring observations to increase reliability of instrument. Facilitated training for Lee Pesky Education Specialists to strengthen mathematical understanding.

2005 – 2008: *Instructional Coach, Pearson-Scott Foresman Publishing*

Professional Development Trainer for mathematics curriculum. Facilitated training workshops for in-service teachers.

2006 – 2007: *Service-Learning Teacher, ANSER Charter School*

Coordinated "Sixth Grade Year of Service" program. Facilitated service learning workshops and provided support to 22 sixth-grade students who designed and implemented individual service projects. Students collectively spent over 300 hours in the community and raised over $5000 for local, national and international non-profit agencies.

2001 – 2006: *Classroom Teacher, ANSER Charter School*

Grades 3 & 4, Grades 5 & 6. Developed and implemented curriculum in accordance with Expeditionary Learning design principles, served on education and policy committees, mentored university interns. Students' project-based learning products included: Idaho history educational websites; a Boise history

magazine; a museum exhibit housed at the Hispanic Cultural Center of Idaho; a calendar containing civil rights poetry and art, profits donated to the Idaho Human Rights Education Center and Friends of Minidoka; health care brochures on issues affecting young people, distributed by local doctor's offices and clinics; designed and hosted "The Maya: A Tapestry of Past and Present," an educational exhibit in collaboration with the Idaho Historical Museum and Chicago artist Winifred Godfrey.

1995 – 2001: *Classroom Teacher, Garfield Elementary*

Grades 1 – 4, Single Grade and Multi-age. Collaborated with team of teachers at Title 1 school to implement Boise School District's only cohesive multiage education program, researched and implemented best practices in teaching, served on education committees, mentored university interns, partnered with on-site developmental preschool.

EXTRA CURRICULAR

- Co--Founder of ANSER Charter School. Developed and obtained charter status for this school which enrolls over 300 students grades K-8, based on an Expeditionary Learning model, currently in its 20th year of operation.
- ANSER Community Board Member, 2017 – present

EDUCATION

Boise State University, Boise, Idaho

- Bachelor of Arts, Elementary Education, 1994. Graduated Cum Laude, Dean's List.
- Master of Arts, Education, Curriculum and Instruction, 2007

CERTIFICATION

- Idaho Standard K-8, 1995, 2000, 2005, 2010 (no current certificate held)
- National Board of Professional Teaching Standards, 2000

PUBLICATIONS

- "The Bookworm." Age-specific monthly parent newsletters featuring early literacy information and activities to do at home. 2008-2014. (Author) Electronic copies can be accessed at https://libraries.idaho.gov/publications/bookworm/.
- "The Scoop." Bi-monthly youth services newsletters for public librarians, school librarians, and other literacy professionals. v2008 – v2019. (Co-author)
- "Librarians: Key Partners in a State-Wide Book Distribution Outreach Program." *PNLA Quarterly, v81, no2, 2017. Peer-reviewed (co-author).*
- "Enhanced Storytimes: Effects on Parent/Caregiver Knowledge, Motivation, and Behaviors." *Children and Libraries (Association for Library Service for Children) v12, no2, 2014. Peer-reviewed (co-author).*
- "Summer Reading Outreach Guidebook", Idaho Commission for Libraries e-publication, 2013. (Co-author) http://libraries.idaho.gov/files/SR-Outreach-Guidebook.pdf
- *Collaborative Summer Library Program Manual*. Publication for national non-profit organization containing summer reading program ideas and resources for children birth – age 18. Contributor, Early Literacy Program Manual: 2010 - present
- Idaho Family Reading Week CD-rom containing early literacy and family literacy resources. Co-author: "Snuggle Up and Read," 2012; "Let the Games Begin!" 2011; "Join the Curious Crowd- Read Aloud!" 2010; "Idaho is Wild About Reading," 2009.
- "Setting Standards for High Quality Work," a Professional Development CD-rom and Guide, ANSER Charter School Staff, 2004. (Co-author)

COMMITTEES

- Treasure Valley Education Partnerships/RISE, 2017 – present
- Preschool the Idaho Way Coalition, 2018 – present
- Collaborative Summer Learning Program School Outreach Committee, 2017 – present
- Chair, Early Literacy Manual Committee, Collaborative Summer Library Programs, 2018-2019; Committee member, 2010 - 2018

- Idaho Reads! Early learning task force, 2011-2016
- Early Years Conference Planning Committee, 2010, 2012, 2014, 2016, 2018

PRESENTATIONS/WORKSHOPS

- Idaho Child Care Reads Early Literacy Workshops, two – three per year, 2012 – present
- IAEYC Professional Development Institute, 2016, 2017
- Association of Library Services to Children Professional Development Institute, 2016
- National Summer Learning Association Conference, 2016
- Idaho Early Years Conference, 2010, 2012, 2014, 2018
- Idaho Indian Education Summit, 2016
- Title III Limited English Proficient Spring Conference, 2010
- Read to Me Regional Fall and Spring Seminars, 2009 – present
- Idaho Library Association Annual Conference, 2011 - 2018
- Idaho Library Association Regional Conferences, various
- Expeditionary Learning Outward Bound National Conference, 2005, 2002
- Idaho Dept. of Education 4th Annual Standards-Based Accountability Conference, 2004
- ANSER Charter School "Best Practices and Standards" Site Summit, 2002
- NBPTS Roundtable Discussion with Senator Larry Craig, 2001
- Edufest Gifted and Talented Conference, 2000, 2001
- Young Writers' Conference, 1996-97, 1999, 2001
- "Career Orientation" course, David Smith, Instructor, 1996 – 2000, Marianne Martini, Instructor, 2001
- "Children At-Risk" course, Robert Barr, Instructor, 1996 – 1998, 2005
- Rocky Mountain Regional International Reading Association Conference, 1998
- BSU Annual Literacy Conference, 1997-98
- Teacher Education Association, 1998

GRANTS AWARDED: Institute of Museum and Library Services, 2012, "Routes to Reading: Idaho Paves the Way with Access to Print," $250,000; Wal-Mart Community Giving Grant, 2009, "Strengthening Library Youth Services in Idaho," $98,000; Idaho Humanities Council, 2006, "The Maya: A Tapestry of Past and Present," $1,000; Idaho Commission on the Arts, 2006, "The Maya: A Tapestry of Past and Present," $1,000; Governor's Innovative Grant, 2002.

Partnerships fostered (partial list):

- Boise State University
- Book It Forward
- Delta Dental
- Head Start Association
- Health and Welfare
- IAEYC/IdahoSTARS
- Idaho Kids Count
- Idaho Voices for Children
- Idaho Children's Trust Fund
- Idaho Business for Education
- Idaho Department of Housing and Finance
- Idaho Out-of-School Network
- Idaho Public Television
- Idaho Food Bank
- Idaho Department of Parks and Rec
- Idaho Division of Oral Health
- Idaho Children's Trust Fund
- Infant-Toddler Program

- Jannus/Idaho Voices for Children
- KPMG Accounting
- State Department of Education Summer Meals Program
- State Department of Education Indian Education Program
- State Department of Education Early Childhood Special Education
- STEM Action Center
- Treasure Valley Education Partnerships (TVEP)/RISE
- United Way North Idaho
- YMCA
- Active collaboration with the following state library agencies (youth services):
    - Washington
    - Oregon
    - Utah
    - Montana
    - Colorado
    - Ohio
    - Kentucky
    - Louisiana
    - Massachusetts
    - Michigan
    - Wisconsin
    - South Carolina
    - Missouri
    - Nevada

Appendix D
School Administration and Organizational Chart

MICHELLE DUNSTAN

michelledunstan1@gmail.com

(208) 602-8391

10968 W. Flintlock Dr., Boise, ID 83713

PROFESSIONAL SUMMARY

I am a school Education Director with 10+ years of EL Education experience seeking to use my skills and dedication in support of the growing impact of Anser Charter School's education model by bringing it to more students in the Treasure Valley.

With strong collaborative skills, I seek to develop the members of my team, seek out opportunities to connect with and learn from my colleagues and inspire a team focus on the mission of the organization that ensures persistence, effectiveness, and accountability for an expanding student demographic.

SKILLS

- EL Education School Leader
- Change Leader
- Facilitate and Organize Professional Development
- Organization Development
- Community Engagement
- Instructional Guide

EDUCATION

Boise State University
Boise, ID • 05/2015

Educational Leadership
Masters in Educational Leadership and Administration

Boise State University
Boise, ID • 05/2010

Boise State Writing Project Fellow

Boise State University
Boise, ID • 05/2008

Elementary Education
With Full Reading Endorsement

CERTIFICATIONS

- K-12 Administration
- K-8 Elementary Education

WORK HISTORY

Anser Charter School - Education Director
Garden City, Idaho • 12/2014 - Current
Co-Director of Boise's first charter school, responsible for managing all aspects of education at Anser Charter School.

- Facilitate a shared leadership model with its exceptional and dedicated teachers, which is able to create a world-class educational experience.
- Be the educational voice that supports Anser's teachers and staff, and parent community that is committed to creating a rich and well-rounded learning environment for all students.
- Worked collaboratively with faculty to lead change initiatives in areas of program effectiveness, academic achievement, and long-term planning.
- Facilitate educational growth for all stakeholders.
- Ensure that all educational programs are aligned with the mission and vision of the school.
- Implement foundational practices of the EL Education model.
- Serve on the national EL Education Leadership Advisory Team
- Build, manage and upgrade K-8 educational program, including administering budgets, coordinating resources and bringing in students.
- Hire, mentor, and supervise teaching staff to carry out organizational goals.

Anser Charter School - Middle Childhood Crew Leader
Garden City, Idaho • 08/2010 - 11/2014
Lead a multi-age classroom of 3rd and 4th graders at Anser Charter School. Committed to creating a rich and well-rounded learning environment in which students:

- Exhibit autonomy, creativity, and collaboration
- Embrace diversity
- Grow through discovery and reflection
- Use real-world experiences
- Create a better world

REFERENCES

- Martha Martin 208.241.4278
- Maggie Chase 208.850.0634
- Tim Lowe 208.854.6180

Manaugh Elementary School - Elementary Teacher
Cortez, Colorado • 8/2008 - 5/2010
Taught 4th and 5th grade children from the Ute and Navajo Reservation. Committed to creating a rich and well-rounded learning environment that supported all students.

Anser Charter School - Community Based Curriculum Director
Boise, Idaho • 08/2006 - 04/2008
The Community Based Curriculum (CBC) is a unique Anser program dedicated to service learning, exploring new ideas, nurturing creativity, building confidence, connecting to and through our community and cultivating stewardship of our natural world. The program builds a foundation for confident creative thinkers. Children have the opportunity to participate in sessions based in Science Education, Visual Arts, Adventure, Performing Arts, Service, and Community.

As Director of this position:

- Developed community partners to work with student groups
- Facilitated volunteer training
- Organized over 80 volunteers a week
- Managed $30,000 grant for this program
- Documented the overall structure of the program

ACCOMPLISHMENTS

Active participant in the EL Education Advisory for the National Leadership Advisory and the West Region.

Change Leadership: Led numerous change processes, including a change to core education programs to increase STEM, reorganization of grade levels to support academic achievement, and the Visioning work for the future of the organization.

HeatherDennis

PROFESSIONAL PROFILE

I am a non-profit Administrator with 8+ years of experience seeking to use my skills and dedication in support of the growing the impact of Anser Charter School's education model by bringing it to more students in the Treasure Valley. With my strong collaborative skills I seek to develop the members of my team, seek out opportunities to connect with and learn from my colleagues and inspire a team focus on the mission of the organization that ensures persistence, effectiveness and accountability.

208.602.0503

1heatherdennis@gmail.com

2711 N. 26th St

Boise, ID 83702

KEY SKILLS

Non-Profit Leadership

Non-Profit Governance

Community Engagement

Leading Change

Organization Development

Stakeholder Communication

EDUCATION

B.S. Developmental Psychology
University of Kansas
Lawrence, Kansas
1993

Trained Habitudes Facilitator

EL Education Leadership Institute Participant

WORK EXPERIENCE

Organization Director
Anser Charter School / Garden City, ID / 2010 – Present

Co-Director of Boise's first charter school, responsible for managing all aspects of Finance, Human Resources, Administrative Operations, Facilities, IT, Governance, Marketing, Enrollment, Volunteer Development, Fundraising, Food Service and paid programs.

- Worked collaboratively with faculty to lead change initiatives in areas of program effectiveness, academic achievement and long-term planning.
- Developed the annual $3 million operating budget to support program objectives and ensure long term financial health of the organization.
- Supervised all financial processes including payroll, accounts payable and receivable, reserve analysis, and financial reporting to the Anser Board.
- Implemented all HR functions including recruitment, compensation, performance evaluation, personnel file management and staff training.
- Supervised all financial, administrative, custodial and food service staff.
- Recruited and trained volunteers for fundraising and community development.
- Served as Board Clerk, including preparing agendas, taking and posting minutes, retreat planning and preparing all documents for Board Meetings.
- Led effective and successful fundraising campaigns each year to raise additional funds for school programs.
- Led annual construction and remodeling projects totaling over $800,000 to improve the function of the school building.

Administrative Associate- Community Organizer Genealogy Project
Center for Community Change / Boise, ID / 2007-2010

Managed logistical support for a project to track the development of community organizing in the US and provided support to CCC's Leadership Development team.

- Filmed, edited and posted videos of interviews with community organizers
- Documented the organizing "lineage" of organizers across many sectors
- Organized all travel and interview logistics.
- Identified retreat locations around the US for Leadership Development retreats.
- Managed retreat center and lodging details for retreats.

HeatherDennis

ADDITIONAL SKILLS

Volunteer Development

Board Clerk

Grant Writing

Non-Profit Fund Development

Project/Process Management

Retreat and Event Planning

ACCOMPLISHMENTS

Strategic Budgeting

Led Anser through 4 years of recession era school funding while maintaining all student programs.

Focus on Sustainability

Increased Anser's reserve fund balance from $400,000 to over $800,000 to ensure long term sustainability of the organization.

Change Leadership

Led numerous change processes, including change to core education programs to increase STEM, reorganization of grade levels to support academic achievement, and the Visioning work for the future of the organization.

Program Manager
Community Living Opportunities / Lawrence, KS / 1993-1995

Directed the staff and activities of a workshop to develop work skills for adults with developmental disabilities

- Recruited and Managed teaching staff
- Developed the budget for various programs
- Worked with community partners to develop work opportunities for clients.
- Developed and implemented a new staffing structure that provided more direct service time to clients.

VOLUNTEER EXPERIENCE

Garden City Comprehensive Plan Review Committee, 2018

Representing education interests within a group of Garden City stakeholders to review the current Garden City Comprehensive plan, written in 2006 and suggest revisions, updates and additions to the Garden City Council. Taking part in public meetings to seek input from Garden City community members on the Comprehensive plan.

Family Council President-Anser Charter School 2006-2009

Led Anser's parent group by building a large, engaged parent community to support fundraising, teacher needs and maintaining Anser's culture. At the request of the Anser Board my term was extended and I recruited and managed parents in donating over 12,000 volunteer remodeling hours when Anser's new building was acquired.

Board President- Boise Cooperative Preschool 2002-2005

Served as President of one of Boise's longest running, non-profit preschools. Duties included leading board meetings, hiring, and evaluating the teaching staff, overseeing management of the school, and identifying, acquiring and remodeling a new location for the preschool.

REFERENCES

Gary Sandusky
Retired Director of Organizing
Center for Community Change
1536 U. St. Washington D.C.
208.484.6062
garysand@gmail.com

Dave Wagers
Owner
Idaho Candy Company
Anser Board President 2012-2014
412 S. 8th St Boise, ID
208.631.5009
dave@idahospud.com

Steven Reames
Director Ada County Medical Society
305 W. Jefferson St.
Boise, ID
208.490-7664
thereames@gmail.com

Appendix F
Supporting Documentation

Anser Charter School Organization Chart

Appendix F1
Letter to School District requesting Charter Transfer

Anser Charter School

Heather Dennis
Anser Charter School
202 E. 42nd St.
Garden City ID, 83714

October 16th 2019

Coby Dennis
8169 W. Victory Rd
Boise ID, 83709

Dear Coby

We are writing to you to formally request that the charter and performance certificate for Anser Charter School be transferred from the Boise Independent School District to the Idaho Public Charter School Commission. The Anser Board of Directors voted to approve the transfer of their charter on October 15th, 2019 and to authorize the Anser Co-Directors to complete the process with the Boise Independent School District staff prior to both Boards taking action to effect the transfer of the revised Anser Charter Performance Certificate.

Pursuant to Idaho Code §33-5205A, please accept this formal request. A copy of the updated Anser charter and the timeline Anser developed with input from Idaho Public Charter School Commission for the process of its approval will be sent via email to yourself and Lisa Roberts. Anser would like to be operating under the authority of the Commission by the 2020-21 school year.

We appreciate the 20-year authorization relationship our organizations have shared. Thank you for your consideration.

Sincerely,

Heather Dennis
Organization Director, Anser Charter School

Cc: Tamara Baysinger, Idaho Public Charter School Commission

Anser Charter School

Heather Dennis
Anser Charter School
202 E. 42nd St.
Garden City ID, 83714

October 16th 2019

Tamara Baysinger
Idaho Public Charter School Commission
304 N. 8th St, Suite 242
Boise ID, 83702

Dear Tamara:

We are writing to you to formally request that the charter and performance certificate for Anser Charter School be transferred from the Boise Independent School District to the Idaho Public Charter School Commission. The Anser Board of Directors voted to approve the transfer of their charter on October 15th, 2019. We believe that the Boise School District Board of Trustees likewise will approve the transfer of the charter and performance certificate.

Pursuant to Idaho Code §33-5205A, please accept this formal request and let us know what additional information the Commission may need. Anser would like to be operating under the authority of the Commission by the 2020-21 school year. Thank you for your consideration.

Sincerely,

Heather Dennis
Organization Director, Anser Charter School

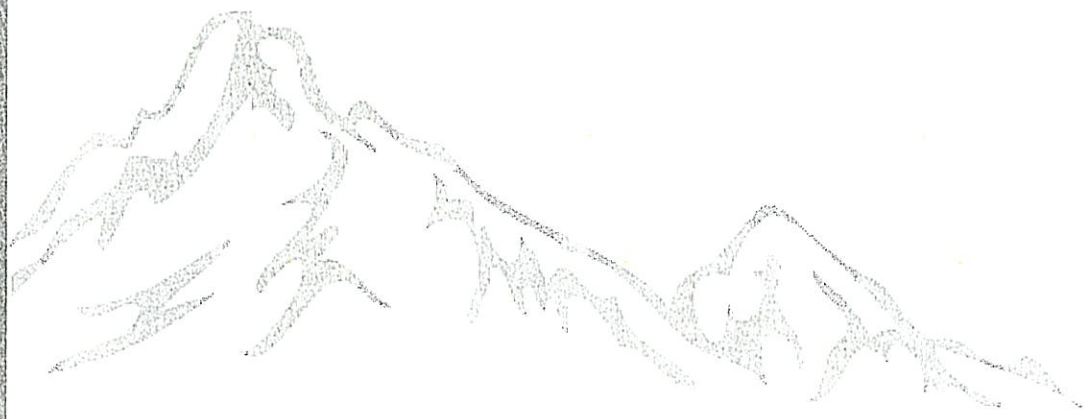
Cc: Coby Dennis, Boise Independent School District

Appendix F2
Anser FY19 Fiscal Audit

Anser of Idaho, Inc.

Year Ended June 30, 2019

Audited Financial Statements



Quest CPAs PLLC

www.qcpas.com

ANSER OF IDAHO, INC.
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Quest CPAs PLLC

Quality Expertise Service Timeliness

Independent Auditor's Report

Board of Directors
Anser of Idaho, Inc.

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Anser of Idaho, Inc. (the School) as of and for the year ended June 30, 2019, and the related notes to the financial statements, which collectively comprise the School's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

11501 Highway 95, Payette, Idaho 83661 | www.qcpas.com | info@qcpas.com | 208-642-1417

Basis for Qualified Opinion on Governmental Activities

Management has elected not to adopt the provisions of GASB 75 *Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions*. Accounting principles generally accepted in the United States of America require recognition and measurement of an asset or liability, deferred outflows of resources, deferred inflows of resources, and expenses related to the other postemployment benefits as well as certain note disclosures and required supplementary information. The amount by which the departure would affect net position, assets, liabilities, deferred outflows of resources, deferred inflows of resources, expenses, note disclosures, and required supplementary information has not been determined.

Qualified Opinion

In our opinion, except for the effects of the matter described in the "Basis for Qualified Opinion on Governmental Activities" paragraph, the financial statements referred to previously present fairly, in all material respects, the financial position of the governmental activities of the School, as of June 30, 2019, and the changes in financial position thereof for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Unmodified Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of each major fund and the aggregate remaining fund information of the School as of June 30, 2019, and the respective changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the budgetary comparison schedules, schedule of employer's share of net pension liability, and schedule of employer contributions listed as required supplementary information in the table of contents be presented to supplement the basic financial statements. Such information, although not required to be a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, and historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Management has not included the management's discussion and analysis information that accounting principles generally accepted in the United States of America require to be presented to supplement the basic financial statements. Such information, although not part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, and historical context. Our opinion on the basic financial statements is not affected by not including this information.

Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the School's basic financial statements. The accompanying combining and individual nonmajor fund financial statements are presented for purposes of additional analysis and are not a required part of the basic financial statements.

The combining and individual nonmajor fund financial statements are the responsibility of management and were derived from and relate directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the combining and individual nonmajor fund financial statements are fairly stated in all material respects in relation to the basic financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated August 26, 2019, on our consideration of the School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance.

Quest CPAs PLLC

Payette, Idaho
August 26, 2019

ANSER OF IDAHO, INC.
Statement of Net Position
June 30, 2019

	Governmental Activities
Assets	
Current Assets	
Cash	$875,232
Receivables:	
Local Sources	5,878
State Sources	75,938
Federal Sources	0
Total Current Assets	957,048
Noncurrent Assets	
Nondepreciable Capital Assets	893,658
Depreciable Net Capital Assets	2,541,221
Total Noncurrent Assets	3,434,879
Total Assets	4,391,927
Deferred Outflows of Resources	
Pension Deferred Outflows	290,106
Total Deferred Outflows of Resources	290,106
Total Assets and Deferred Outflows of Resources	$4,682,033
Liabilities	
Current Liabilities	
Accounts Payable	$12,836
Salaries & Benefits Payable	264,998
Prepaid Registration & Deposits	3,512
Long-Term Debt, Current	108,416
Total Current Liabilities	389,762
Noncurrent Liabilities	
Long-Term Debt, Noncurrent	1,940,093
Net Pension Liability	685,902
Total Noncurrent Liabilities	2,625,995
Total Liabilities	3,015,757
Deferred Inflows of Resources	
Pension Deferred Inflows	128,010
Total Deferred Inflows of Resources	128,010
Total Liabilities and Deferred Inflows of Resources	3,143,767
Net Position	
Net Investment in Capital Assets	1,386,370
Restricted:	
Special Programs	36,502
Debt Service	225,000
Unrestricted	(109,606)
Total Net Position	1,538,266
Total Liabilities and Deferred Inflows of Resources and Net Position	$4,682,033

See Accompanying Notes

ANSER OF IDAHO, INC.
Statement of Activities
Year Ended June 30, 2019

Functions/Programs	Expenses	Program Revenues			Net (Expense) Revenue And Changes in Net Position
		Charges For Services	Operating Grants And Contributions	Capital Grants And Contributions	Governmental Activities
Governmental Activities					
Instructional Programs					
Elementary School	$817,134		$63,052		($754,082)
Secondary School	373,476				(373,476)
Special Education	211,831		42,740		(169,091)
Gifted & Talented	348				(348)
Support Service Programs					
Special Education Support Services	30				(30)
Instruction Improvement	144,584				(144,584)
Educational Media Program	1,156				(1,156)
Pension Sources	96,321		87,736		(8,585)
Board of Education Program	40,718				(40,718)
District Administration Program	1,263		1,220		(43)
School Administration	210,223				(210,223)
Business Operation	119,446				(119,446)
Administrative Technology	25,030				(25,030)
Buildings - Care	98,054				(98,054)
Maintenance - Student Occupied	38,039				(38,039)
Maintenance - Grounds	8,007				(8,007)
Security	22,082		6,526		(15,556)
Non-Instructional Programs					
Child Nutrition	109,843	$63,161	41,910		(4,772)
Community Services	50,485				(50,485)
Capital Assets - Student Occupied	83,715				(83,715)
Capital Assets - Non-Student Occupied	0				0
Debt Service - Principal	0				0
Debt Service - Interest	68,308				(68,308)
Total	$2,520,093	$63,161	$243,184	$0	(2,213,748)
	General Revenues				
	Local Revenue				209,253
	State Revenue				2,331,148
	Federal Revenue				0
	Pension Revenue (Expense)				(152,123)
	Total				2,388,278
	Change in Net Position				174,530
	Net Position - Beginning				1,363,736
	Net Position - Ending				$1,538,266

ANSER OF IDAHO, INC.
Balance Sheet - Governmental Funds
June 30, 2019

	General Fund	Child Nutrition Fund	Other Governmental Funds
Assets			
Cash	$806,994	$17,583	$50,655
Receivables:			
Local Sources	5,565		313
State Sources	75,938		0
Federal Sources			0
Due From Other Funds	283		0
Total Assets	$888,780	$17,583	$50,968
Liabilities			
Accounts Payable	$260	$367	$12,209
Due To Other Funds			283
Salaries & Benefits Payable	247,708	3,987	13,303
Prepaid Registration & Deposits	1,612		1,900
Total Liabilities	249,580	4,354	27,695
Fund Balances			
Restricted:			
Special Programs		13,229	23,273
Debt Service	225,000		0
Unassigned	414,200		0
Total Fund Balances	639,200	13,229	23,273
Total Liabilities and Fund Balances	$888,780	$17,583	$50,968

See Accompanying Notes

ANSER OF IDAHO, INC.
Balance Sheet - Governmental Funds
June 30, 2019

	Total Governmental Funds
Assets	
Cash	$875,232
Receivables:	
Local Sources	5,878
State Sources	75,938
Federal Sources	0
Due From Other Funds	283
Total Assets	$957,331
Liabilities	
Accounts Payable	$12,836
Due To Other Funds	283
Salaries & Benefits Payable	264,998
Prepaid Registration & Deposits	3,512
Total Liabilities	281,629
Fund Balances	
Restricted:	
Special Programs	36,502
Debt Service	225,000
Unassigned	414,200
Total Fund Balances	675,702
Total Liabilities and Fund Balances	$957,331

ANSER OF IDAHO, INC.
Balance Sheet - Governmental Funds
June 30, 2019

Reconciliation of Total Governmental Fund Balances to Net Position of Governmental Activities	
Total Governmental Fund Balances	$675,702
Amounts reported for governmental activities in the statement of net position are different because:	
Capital assets used in governmental activities are not financial resources and therefore are not reported in the funds.	3,434,879
Certain liabilities are not due and payable in the current period and therefore are not reported in the funds.	(2,048,509)
Net pension liability and related pension source deferred outflow and deferred inflow of resources, are not due and payable in the current period and therefore are not reported in the funds.	(523,806)
Net Position of Governmental Activities	$1,538,266

ANSER OF IDAHO, INC.

Statement of Revenues, Expenditures, and Changes in
Fund Balances - Governmental Funds
Year Ended June 30, 2019

	General Fund	Child Nutrition Fund	Other Governmental Funds
Revenues			
Local Revenue	$173,019	$63,161	$99,286
State Revenue	2,331,148		95,482
Federal Revenue		41,910	42,740
Total Revenues	2,504,167	105,071	237,508
Expenditures			
Instructional Programs			
Elementary School	933,233		700
Secondary School	426,859		0
Special Education	169,091		42,740
Gifted & Talented	348		0
Support Service Programs			
Special Education Support Services	30		0
Instruction Improvement	144,584		0
Educational Media Program	1,156		0
Instruction-Related Technology			96,321
Board of Education Program	40,718		0
District Administration Program			1,263
School Administration	178,712		31,511
Business Operation	119,446		0
Administrative Technology	25,030		0
Buildings - Care	98,054		0
Maintenance - Student Occupied	38,039		0
Maintenance - Grounds	8,007		0
Security	15,556		6,526
Non-Instructional Programs			
Child Nutrition	2,151	107,692	0
Community Services	222		50,263
Capital Assets - Student Occupied	14,481		0
Capital Assets - Non-Student Occupied	279,235		0
Debt Service - Principal	105,149		0
Debt Service - Interest	68,308		0
Total Expenditures	2,668,409	107,692	229,324
Excess (Deficiency) of Revenues Over Expenditures	(164,242)	(2,621)	8,184
Other Financing Sources (Uses)			
Transfers In	68,881		0
Transfers Out			(68,881)
Total Other Financing Sources (Uses)	68,881	0	(68,881)
Net Change in Fund Balances	(95,361)	(2,621)	(60,697)
Fund Balances - Beginning	734,561	15,850	83,970
Fund Balances - Ending	$639,200	$13,229	$23,273

ANSER OF IDAHO, INC.

Statement of Revenues, Expenditures, and Changes in
Fund Balances - Governmental Funds
Year Ended June 30, 2019

	Total Governmental Funds
Revenues	
Local Revenue	$335,466
State Revenue	2,426,630
Federal Revenue	84,650
Total Revenues	2,846,746
Expenditures	
Instructional Programs	
Elementary School	933,933
Secondary School	426,859
Special Education	211,831
Gifted & Talented	348
Support Service Programs	
Special Education Support Services	30
Instruction Improvement	144,584
Educational Media Program	1,156
Instruction-Related Technology	96,321
Board of Education Program	40,718
District Administration Program	1,263
School Administration	210,223
Business Operation	119,446
Administrative Technology	25,030
Buildings - Care	98,054
Maintenance - Student Occupied	38,039
Maintenance - Grounds	8,007
Security	22,082
Non-Instructional Programs	
Child Nutrition	109,843
Community Services	50,485
Capital Assets - Student Occupied	14,481
Capital Assets - Non-Student Occupied	279,235
Debt Service - Principal	105,149
Debt Service - Interest	68,308
Total Expenditures	3,005,425
Excess (Deficiency) of Revenues Over Expenditures	(158,679)
Other Financing Sources (Uses)	
Transfers In	68,881
Transfers Out	(68,881)
Total Other Financing Sources (Uses)	0
Net Change in Fund Balances	(158,679)
Fund Balances - Beginning	834,381
Fund Balances - Ending	$675,702

See Accompanying Notes

ANSER OF IDAHO, INC.

Statement of Revenues, Expenditures, and Changes in Fund Balances - Governmental Funds
Year Ended June 30, 2019

Reconciliation of the Statement of Revenues, Expenditures, and Changes in Fund Balances - Governmental Funds to the Statement of Activities

Net Change in Fund Balances - Total Governmental Funds	($158,679)
Amounts reported for governmental activities in the statement of activities are different because:	
Government funds report capital outlays as expenditures. However, in the statement of activities the cost of those assets is allocated over their estimated useful lives as depreciation expense. This is the excess of capital outlays over (under) depreciation expense in the current period.	210,001
Repayment of debt principal is an expenditure in the governmental funds, but the repayment reduces long-term debt in the statement of net position.	105,149
Changes in net pension liability and related pension source deferred outflow and deferred inflow of resources do not provide or require current financial resources and therefore are not reflected in the funds.	18,059
Change in Net Position of Governmental Activities	$174,530

See Accompanying Notes

ANSER OF IDAHO, INC.
Statement of Fiduciary Net Position
June 30, 2019

	Agency Funds - Student Activity
Assets	
Cash & Investments	$5,689
Total Assets	$5,689
Liabilities	
Due to Student Groups	$5,689
Total Liabilities	5,689
Net Position	0
Total Net Position	0
Total Liabilities and Net Position	$5,689

See Accompanying Notes

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Reporting Entity – Anser of Idaho, Inc. (the School) is organized as a nonprofit corporation providing public charter school educational services as authorized by Section 33 of Idaho Code.

Idaho Code Section 33-5210(3) requires charter schools to comply with the same financial reporting requirements imposed on school districts, i.e. – on a governmental, rather than nonprofit, basis of accounting. Additionally, enabling legislation creates charter schools as public entities, i.e. – as public schools, subject to provisions common with other governmental entities as set forth in Idaho Code Section 33-5204. Accordingly, the School's basis of presentation follows the governmental, rather than nonprofit, reporting model.

These financial statements are prepared in accordance with generally accepted accounting principles (GAAP) as applied to charter schools. The governmental accounting standards board (GASB) is responsible for establishing GAAP for state and local governments through its pronouncements (statements and interpretations). The more significant accounting policies established in GAAP and used by the School are discussed below.

Basic Financial Statements - Government-Wide Statements – The School's basic financial statements include both government-wide (reporting the School as a whole) and fund financial statements (reporting the School's major funds). Both government-wide and fund financial statements categorize primary activities as either governmental or business type. Currently, all the School's activities are categorized as governmental activities.

In the government-wide statement of net position, the activities columns (a) are presented on a consolidated basis by column, (b) and are reported on a full accrual, economic resource basis, which recognizes all long-term assets and receivables as well as long-term debt and obligations.

The government-wide statement of activities reports both the gross and net cost of each of the School's functions. The functions are also supported by general government revenues as reported in the statement of activities. The statement of activities reduces gross expenses (including depreciation when recorded) by related program revenues and operating and capital grants. Program revenues must be directly associated with the function. Internal activity between funds (when two or more funds are involved) is eliminated in the government-wide statement of activities. Operating grants include operating-specific and discretionary (either operating or capital) grants while the capital grants column reports capital-specific grants.

The net costs (by function) are normally covered by general revenues.

The School reports expenditures in accordance with the State Department of Education's "Idaho Financial Accounting Reporting Management System" (IFARMS). IFARMS categorizes all expenditures by function, program and object. Accordingly, there is no allocation of indirect costs.

The government-wide focus is more on the sustainability of the School as an entity and the change in the School's net position resulting from the current year's activities. Fiduciary funds, when present, are not included in the government-wide statements.

Basic Financial Statements - Fund Financial Statements – The financial transactions of the School are reported in individual funds in the fund financial statements. Each fund is accounted for by providing a

separate set of self-balancing accounts that comprises its assets, deferred outflows of resources, liabilities, deferred inflows of resources, fund equity, revenues and expenditures/expenses.

The emphasis in fund financial statements is on the major funds. Nonmajor funds by category are summarized into a single column. Generally accepted accounting principles set forth minimum criteria (percentage of assets and deferred outflows of resources, liabilities and deferred inflows of resources, revenues or expenditures/expenses of the funds) for the determination of major funds.

The focus of the governmental funds' measurement (in the fund statements) is upon determination of financial position and changes in financial position (sources, uses, and balances of financial resources) rather than upon net income. Major governmental funds of the School include:

General Fund – The general fund is the School's primary operating fund. It is used to account for all financial resources except those required to be accounted for in another fund.

Special Revenue Funds – Special revenue funds are used to account for the proceeds of specific revenue sources that are legally restricted to expenditures for specified purposes. Major special revenue funds include the child nutrition fund, which serves to account for providing nutritional meals to students (including subsidized meals).

Fiduciary funds are used to report assets held in a trustee or agency capacity for others and therefore are not available to support School programs. The reporting focus is on net position and changes in net position and are reported using accounting principles similar to proprietary funds. Fiduciary funds of the School include:

Agency Funds – Agency funds are used to account for assets held by the School on behalf of students.

Basis of Accounting – Basis of accounting refers to the point at which revenues or expenditures/expenses are recognized in the accounts and reported in the financial statements. It relates to the timing of the measurements made regardless of the measurement focus applied.

Activities in the government-wide and fiduciary fund financial statements are presented on the full accrual basis of accounting. Revenues are recognized when earned and expenses are recognized when incurred.

The governmental funds financial statements are presented on the modified accrual basis of accounting. Under the modified accrual basis of accounting, revenues are recorded when susceptible to accrual (when they become both measurable and available). "Measurable" means the amount of the transaction can be determined and "available" means collectible within the current period or within thirty days after year end. Expenditures are recorded when the related fund liability is incurred. Exceptions to this general rule include principal and interest on long-term debt which, if any, are recognized when due and payable.

Cash – Nearly all the cash balances of the School's funds are pooled for investment purposes. The individual funds' portions of the pooled cash are reported in each fund as cash. Interest earned on pooled cash is allocated to the various funds in proportion to each fund's respective investment balance.

Receivables – Receivables are reported net of any estimated uncollectible amounts.

Inventories – Material supplies on hand at year end are stated at the lower of cost or net realizable value using the first-in, first-out method.

Capital Assets and Depreciation – Capital assets purchased or acquired with an original cost of $5,000 or more are reported at historical cost or estimated historical cost. Contributed assets are reported at acquisition value as of the date received. Additions, improvements and other capital outlays that significantly extend the useful life of an asset are capitalized. Other costs incurred for repairs and maintenance are expensed as incurred. Depreciation over the estimated useful lives of depreciable assets is recorded using the straight line method.

Compensated Absences – The School provides certain compensated absences to its employees. The estimated amount of compensation for future amounts is deemed to be immaterial and, accordingly, no liability is recorded.

Other Post-Employment Benefits – The School does not provide benefits to retired employees other than retirement benefits funded through the Public Employees Retirement System of Idaho. However, certain retired employees can remain on the School insurance policy after retirement if the retired employee pays the average monthly cost. The difference between the age-adjusted monthly cost and the average monthly cost is referred to as an "implicit subsidy" since the medical insurance rate of a retired employee is generally higher than the medical insurance rate of a younger employee. GASB 75 requires that employers have actuarial calculations performed for these other post-employment benefits so that liabilities and related expenses can be recorded in the government-wide financial statements and related notes and required supplementary information can be prepared. Management believes the costs of implementing GASB 75 cannot be justified at this time. Accordingly, the School accounts for the other-post employment benefits for retirees on the pay-as-you-go basis.

Pensions – For purposes of measuring the net pension liability and pension expense/revenue, information about the fiduciary net position of the Public Employee Retirement System of Idaho Base Plan (the Base Plan) and additions to/deductions from Base Plan's fiduciary net position have been determined on the same basis as they are reported by the Base Plan. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

Net Position – Net position is assets plus deferred outflows of resources less liabilities less deferred inflows of resources. The net investment in capital assets component of net position consists of the historical cost of capital assets less accumulated depreciation less any outstanding debt that was used to finance those assets plus deferred outflows of resources less deferred inflows of resources related to those assets. Restricted net position consists of assets that are restricted by creditors, grantors, contributors, legislation, and other parties. All other net position not reported as restricted or net investment in capital assets is reported as unrestricted.

Fund Balance Classifications – Restrictions of the fund balance indicate portions that are legally or contractually segregated for a specific future use. Nonspendable portions of the fund balance are those amounts that cannot be spent because they are in a nonspendable form or because they are legally or contractually required to be maintained intact. Committed portions represent amounts that can only be used for specific purposes pursuant to formal action (i.e. board approval) of the reporting entity's governing body. Assigned portions represent amounts that are constrained by the government's intent to be used for a specific purpose. Remaining fund balances are reported as unassigned. When expenditures are incurred that qualify for either restricted or unrestricted resources, the School first utilizes restricted resources. When expenditures are incurred that qualify for either committed or assigned or unassigned resources, the School first utilizes committed resources then assigned resources before using unassigned resources.

Income Taxes – The School is exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code except for income, if any, derived from unrelated business activities. The School's tax returns for the current year and prior two years are subject to examination by the IRS and state tax authorities, generally for three years after they are filed.

Contingent Liabilities – Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount, if any, of expenditures which may be disallowed by the grantor cannot be determined at this time although the School expects such amounts, if any, to be immaterial.

Interfund Activity – Interfund activity is reported either as loans, services provided, reimbursements, or transfers. Loans are reported as interfund receivables and payables as appropriate and are subject to elimination upon consolidation. Services provided, deemed to be at market or near market rates, are treated as revenues and expenditures/expenses. Reimbursements are when one fund incurs a cost, charges the appropriate benefiting fund, and reduces its related cost as a reimbursement. All other interfund transactions are treated as transfers.

Use of Estimates – The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Custodial Credit Risk – The School maintains its cash at insured financial institutions. Periodically, balances may exceed federally insured limits. The School does not have a formal policy concerning custodial credit risk.

Risk Management – The School is exposed to various risks related to its operations. Insurance is utilized to the extent practical to minimize these risks.

Nonmonetary Transactions – Items received via food commodities programs are recognized at their stated fair market value.

Subsequent Events – Subsequent events were evaluated through the date of the auditor's report, which is the date the financial statements were available to be issued.

B. CASH

Cash consists of the following at year end:

	Governmental Funds	Fiduciary Funds	Total
Cash - Deposits	$875,232	$5,689	$880,921
Total	$875,232	$5,689	$880,921

Deposits – At year end, the carrying amounts of the School's deposits were $880,921 and the bank balances were $883,841. Of the bank balances, $500,000 was insured and the balance was uninsured and uncollateralized.

Investments – State statutes authorize government entities to invest in certain bonds, notes, accounts, investment pools, and other obligations of the state, U.S. Government, and U.S. corporations pursuant to Idaho Code 67-1210 and 67-1210A. These statutes are designed to help minimize the custodial risk that deposits may not be returned in the event of the failure of the issuer or other counterparty, interest rate risk resulting from fair value losses arising from rising interest rates, or credit risks that an issuer or other counterparty will not fulfill its obligations. The School's investment policy complies with state statutes.

C. RECEIVABLES

Receivables consist of the following at year end:

	General Fund	Special Revenue Funds	Total
Local Sources			
Other Local	$5,565	$313	$5,878
Total	$5,565	$313	$5,878
State Sources			
Foundation Programs	$75,938		$75,938
Total	$75,938		$75,938

D. CAPITAL ASSETS

A summary of capital assets for the year is as follows:

	Beginning Balance	Increases	Decreases	Ending Balance
Nondepreciable Capital Assets				
Land	$614,423	$279,235		$893,658
Total	614,423	279,235	$0	893,658
Depreciable Capital Assets				
Buildings	3,144,560			3,144,560
Equipment	117,645			117,645
Subtotal	3,262,205	0	0	3,262,205
Accumulated Depreciation				
Buildings	580,588	62,890		643,478
Equipment	71,162	6,344		77,506
Subtotal	651,750	69,234	0	720,984
Total	2,610,455	(69,234)	0	2,541,221
Net Capital Assets	$3,224,878	$210,001	$0	$3,434,879

Depreciation expense of $69,234 was charged to the capital assets – student occupied program.

E. LONG-TERM DEBT

Bonded Debt - At year end, the School's bonded debt was as follows:

	Outstanding
2009 - $2,700,000 - bonds for capital improvements due in monthly payments of $13,545 (including one final balloon payment for all remaining principal and interest due on June 1, 2023) with interest at a variable rate (currently at 3.09%) through 2022/23, secured by real estate, paid through the general fund	$1,934,433
Total	$1,934,433

Maturities on the bonds are estimated as follows:

Year Ended	Principal	Interest
6/30/20	$103,242	$59,293
6/30/21	106,685	55,850
6/30/22	110,076	52,460
6/30/23	1,614,430	48,962
Total	$1,934,433	$216,565

Note Payable – At year end, the School's note payable was as follows:

Note payable due in monthly payments of $910 (including one final balloon payment for all remaining principal and interest due on June 1, 2023) with interest at 5.06% through 2022/23, secured by real estate and equipment, paid through the general fund	$114,076
Total	$114,076

Maturities on the note are estimated as follows:

Year Ended	Principal	Interest
6/30/20	$5,174	$5,748
6/30/21	5,462	5,460
6/30/22	5,749	5,173
6/30/23	97,691	4,871
Total	$114,076	$21,252

Changes in long-term debt are as follows:

Description	Beginning Balance	Increases	Decreases	Ending Balance	Due Within One Year
2009 Bonds	$2,034,651		$100,218	$1,934,433	$103,242
Note Payable	119,007		4,931	114,076	5,174
Total	$2,153,658	$0	$105,149	$2,048,509	$108,416

Interest and related costs during the year amounted to $68,308 and were charged to the debt service – interest program.

F. PENSION PLAN

Plan Description

The School contributes to the Base Plan which is a cost-sharing multiple-employer defined benefit pension plan administered by Public Employee Retirement System of Idaho (PERSI or System) that covers substantially all employees of the State of Idaho, its agencies and various participating political subdivisions. The cost to administer the plan is financed through the contributions and investment earnings of the plan. PERSI issues a publicly available financial report that includes financial statements and the required supplementary information for PERSI. That report may be obtained on the PERSI website at www.persi.idaho.gov.

Responsibility for administration of the Base Plan is assigned to the Board comprised of five members appointed by the Governor and confirmed by the Idaho Senate. State law requires that two members of the Board be active Base Plan members with at least ten years of service and three members who are Idaho citizens not members of the Base Plan except by reason of having served on the Board.

Pension Benefits

The Base Plan provides retirement, disability, death and survivor benefits of eligible members or beneficiaries. Benefits are based on members' years of service, age, and highest average salary. Members become fully vested in their retirement benefits with five years of credited service (5 months for elected or appointed officials). Members are eligible for retirement benefits upon attainment of the ages specified for their employment classification. The annual service retirement allowance for each month of credited service is 2.0% (2.3% for police/firefighters) of the average monthly salary for the highest consecutive 42 months.

The benefit payments for the Base Plan are calculated using a benefit formula adopted by the Idaho Legislature. The Base Plan is required to provide a 1% minimum cost of living increase per year provided the Consumer Price Index increases 1% or more. The PERSI Board has the authority to provide higher cost of living increases to a maximum of the Consumer Price Index movement or 6%, whichever is less; however, any amount above the 1% minimum is subject to review by the Idaho Legislature.

Member and Employer Contributions

Member and employer contributions paid to the Base Plan are set by statute and are established as a percent of covered compensation. Contribution rates are determined by the PERSI Board within limitations, as defined by state law. The Board may make periodic changes to employer and employee contribution rates

(expressed as percentages of annual covered payroll) that are adequate to accumulate sufficient assets to pay benefits when due.

The contribution rates for employees are set by statute at 60% of the employer rate for general employees and 72% for police and firefighters. As of June 30, 2018 it was 6.79% for general employees and 8.36% for police and firefighters. The employer contribution rate as a percent of covered payroll is set by the Retirement Board and was 11.32% for general employees and 11.66% for police and firefighters. The School's contributions were $170,182 for the year ended June 30, 2019.

Pension Liabilities, Pension Expense (Revenue), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions

At June 30, 2019, the School reported a liability for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2018, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of that date. The School's proportion of the net pension liability was based on the School's share of contributions in the Base Plan pension plan relative to the total contributions of all participating PERSI Base Plan employers. At June 30, 2019, the School's proportion was 0.0465013 percent.

For the year ended June 30, 2019, the School recognized pension revenue (expense) of ($152,123). At June 30, 2019, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$75,293	$51,802
Changes in assumptions or other inputs	44,631	
Net difference between projected and actual earnings on pension plan investments		76,208
Employer contributions subsequent to the measurement date	170,182	
Total	$290,106	$128,010

$170,182 reported as deferred outflows of resources related to pensions resulting from School contributions made subsequent to the measurement date will be recognized as an addition to the pension (expense) or reduction of the pension revenue in the year ending June 30, 2019.

The average of the expected remaining service lives of all employees that are provided with pensions through the System (active and inactive employees) determined at July 1, 2017 the beginning of the measurement period ended June 30, 2018 is 4.9 and 5.5 for the measurement period June 30, 2018.
Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension (expense) revenue as follows:

Year Ended	
6/30/20	$55,755
6/30/21	6,570
6/30/22	(56,205)
6/30/23	(14,206)
Total	($8,086)

Actuarial Assumptions

Valuations are based on actuarial assumptions, the benefit formulas, and employee groups. Level percentages of payroll normal costs are determined using the Entry Age Normal Cost Method. Under the Entry Age Normal Cost Method, the actuarial present value of the projected benefits of each individual included in the actuarial valuation is allocated as a level percentage of each year's earnings of the individual between entry age and assumed exit age. The Base Plan amortizes any unfunded actuarial accrued liability based on a level percentage of payroll. The maximum amortization period for the Base Plan permitted under Section 59-1322, Idaho Code, is 25 years.

The total pension liability in the June 30, 2018 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	3.25%
Salary increases	4.25 – 10.00%
Salary inflation	3.75%
Investment rate of return	7.10%, net of investment expenses
Cost-of-living adjustments	1%

Mortality rates were based on the RP – 2000 combined table for healthy males or females as appropriate with the following offsets:

- Set back 3 years for teachers
- No offset for male fire and police
- Forward one year for female fire and police
- Set back one year for all general employees and all beneficiaries

An experience study was performed for the period July 1, 2007 through June 30, 2013 which reviewed all economic and demographic assumptions other than mortality. Mortality and all economic assumptions were studied in 2014 for the period from July 1, 2009 through June 30, 2013. The total pension liability as of June 30, 2018 is based on the results of an actuarial valuation date of July 1, 2018.

The long-term expected rate of return on pension plan investments was determined using the building block approach and a forward-looking model in which best estimate ranges of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighing the expected future real rates of return by the target asset allocation percentage and by adding expected inflation.

Even though history provides a valuable perspective for setting the investment return assumption, the System relies primarily on an approach which builds upon the latest capital market assumptions. Specifically, the System uses consultants, investment managers and trustees to develop capital market

assumptions in analyzing the System's asset allocation. The assumptions and the System's formal policy for asset allocation are shown below. The formal asset allocation policy is somewhat more conservative than the current allocation of System's assets.

The best-estimate range for the long-term expected rate of return is determined by adding expected inflation to expected long-term real returns and reflecting expected volatility and correlation. The capital market assumptions are as of January 1, 2017.

Capital Market Assumptions

Asset Class	Expected Return*	Expected Risk	Strategic Normal	Strategic Ranges
Equities			70%	66% - 77%
Broad Domestic Equities	9.15%	19.00%	55%	50% - 65%
International	9.25%	20.20%	15%	10% - 20%
Fixed Income	3.05%	3.75%	30%	23% - 33%
Cash	2.25%	0.90%	0%	0% - 5%

Total Fund	Expected Return*	Expected Inflation	Expected Real Return	Expected Risk
Actuary	7.00%	3.25%	3.75%	N/A
Portfolio	6.58%	2.25%	4.33%	12.67%

*Expected arithmetic return net of fees and expenses

Actuarial Assumptions	
Assumed Inflation - Mean	3.25%
Assumed Inflation - Standard Deviation	2.00%
Portfolio Arithmetic Mean Return	8.42%
Portfolio Long-Term Expected Geometric Rate of Return	7.50%
Assumed Investment Expenses	0.40%
Long-Term Expected Geometric Rate of Return, Net of Investment Expenses	**7.10%**

Discount Rate

The discount rate used to measure the total pension liability was 7.10%. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate. Based on these assumptions, the pension plans' net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability. The long-term expected rate of return was determined net of pension plan investment expense but without reduction for pension plan administrative expense.

Sensitivity of the School's proportionate share of the net pension liability to changes in the discount rate.

The following presents the School's proportionate share of the net pension liability calculated using the discount rate of 7.10 percent, as well as what the School's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1-percentage-point lower (6.10 percent) or 1-percentage-point higher (8.10 percent) than the current rate:

	1% Decrease (6.10%)	Current Discount Rate (7.10%)	1% Increase (8.10%)
School's proportionate share of the net pension liability (asset)	$1,716,969	$685,902	($167,863)

Pension plan fiduciary net position

Detailed information about the pension plan's fiduciary net position is available in the separately issued PERSI financial report.

PERSI issues a publicly available financial report that includes financial statements and the required supplementary information for PERSI. That report may be obtained on the PERSI website at www.persi.idaho.gov.

Impacts on the School's net position

Depending on the annual performance of the Base Plan and the various non-financial factors that affect the collective Base Plan net pension liability (as described above), the School may periodically experience a deficit in its net position. This can occur as a result of recording the School's allocable portion of the net pension liability which is an estimated liability that changes substantially from year to year depending on the factors described above but does not currently require cash outflows. As the net pension liability of the Base Plan is closely monitored by PERSI's board (who makes changes to the contribution rates and other terms of the Base Plan whenever deemed necessary), such deficits are not deemed to be of substantial concern.

G. INTERFUND TRANSFERS

Interfund balances at year end consist of the following:

	Due From Fund	
Due To Fund	Nonmajor Governmental	Total
General	$283	$283
Total	$283	$283

These interfund balances resulted from the time lag between when expenditures are incurred in a fund and when the fund is reimbursed for such expenditures.

Interfund transfers during the year consist of the following:

Fund	Transfer In	Transfer Out	Purpose
General	$68,881		Reimbursements
Nonmajor Governmental		$68,881	Reimbursements
Total	$68,881	$68,881	

ANSER OF IDAHO, INC.

Budgetary Comparison Schedule - General and Major Special Revenue Funds

Year Ended June 30, 2019

General Fund	Budgeted Amounts (GAAP Basis) Original	Budgeted Amounts (GAAP Basis) Final	Actual Amounts	Final Budget Variance Positive (Negative)	
Revenues					
Local Revenue	$127,800	$127,800	$173,019	$45,219	
State Revenue	2,357,582	2,357,582	2,331,148	(26,434)	
Federal Revenue	0	0	0	0	
Total Revenues	2,485,382	2,485,382	2,504,167	18,785	
Expenditures					
Instructional Programs					
Elementary School	964,602	964,602	933,233	31,369	
Secondary School	401,670	401,670	426,859	(25,189)	
Special Education	170,309	170,309	169,091	1,218	
Gifted & Talented	500	500	348	152	
Support Service Programs					
Special Education Support Services	500	500	30	470	
Instruction Improvement	140,824	140,824	144,584	(3,760)	
Educational Media Program	3,300	3,300	1,156	2,144	
Instruction-Related Technology	0	0	0	0	
Board of Education Program	30,750	30,750	40,718	(9,968)	
District Administration Program	0	0	0	0	
School Administration	202,750	202,750	178,712	24,038	
Business Operation	112,570	112,570	119,446	(6,876)	
Administrative Technology	29,700	29,700	25,030	4,670	
Buildings - Care	99,348	99,348	98,054	1,294	
Maintenance - Student Occupied	65,000	65,000	38,039	26,961	
Maintenance - Grounds	9,000	9,000	8,007	993	
Security	21,921	21,921	15,556	6,365	
Non-Instructional Programs					
Child Nutrition	2,494	2,494	2,151	343	
Community Services	0	0	222	(222)	
Capital Assets - Student Occupied	10,000	10,000	14,481	(4,481)	
Capital Assets - Non-Student Occupied	221,119	221,119	279,235	(58,116)	
Debt Service - Principal	105,149	105,149	105,149	0	
Debt Service - Interest	68,308	68,308	68,308	0	
Total Expenditures	2,659,814	2,659,814	2,668,409	(8,595)	*
Excess (Deficiency) of Revenues Over Expenditures	(174,432)	(174,432)	(164,242)	10,190	
Other Financing Sources (Uses)					
Transfers In	0	0	68,881	68,881	
Transfers Out	0	0	0	0	*
Total Other Financing Sources (Uses)	0	0	68,881	68,881	
Net Change in Fund Balances	(174,432)	(174,432)	(95,361)	79,071	
Fund Balances - Beginning	730,035	730,035	734,561	4,526	
Fund Balances - Ending	$555,603	$555,603	$639,200	$83,597	
		**Total expenditures (over) under appropriations are:*		($8,595)	

ANSER OF IDAHO, INC.

Budgetary Comparison Schedule - General and Major Special Revenue Funds
Year Ended June 30, 2019

Child Nutrition Fund	Budgeted Amounts (GAAP Basis) Original	Budgeted Amounts (GAAP Basis) Final	Actual Amounts	Final Budget Variance Positive (Negative)	
Revenues					
Local Revenue	$85,000	$85,000	$63,161	($21,839)	
Federal Revenue	0	0	41,910	41,910	
Total Revenues	85,000	85,000	105,071	20,071	
Expenditures					
Non-Instructional Programs					
Buildings - Care			0		
Child Nutrition	85,001	85,001	107,692	(22,691)	
Total Expenditures	85,001	85,001	107,692	(22,691)	*
Excess (Deficiency) of Revenues Over Expenditures	(1)	(1)	(2,621)	(2,620)	
Other Financing Sources (Uses)					
Transfers In	0	0	0	0	
Transfers Out	0	0	0	0	*
Total Other Financing Sources (Uses)	0	0	0	0	
Net Change in Fund Balances	(1)	(1)	(2,621)	(2,620)	
Fund Balances - Beginning	17,185	17,185	15,850	(1,335)	
Fund Balances - Ending	$17,184	$17,184	$13,229	($3,955)	
	**Total expenditures (over) under appropriations are:*			($22,691)	

ANSER OF IDAHO, INC.

Schedule of Employer's Share of Net Pension Liability

PERSI - Base Plan

Last 10 - Fiscal Years*

	2018	2017	2016	2015	2014
School's portion of the net pension liability	0.0465013%	0.0455680%	0.0419714%	0.0375696%	0.0378396%
School's proportionate share of the net pension liability	$685,902	$716,251	$850,825	$494,731	$278,599
School's covered payroll	$1,496,113	$1,415,300	$1,222,827	$1,060,707	$1,025,124
School's proportional share of the net pension liability as a percentage of its covered payroll	45.85%	50.61%	69.58%	46.64%	27.18%
Plan fiduciary net position as a percentage of the total pension liability	91.69%	90.68%	87.26%	91.38%	94.95%

*GASB 68 requires ten years of information to be presented in this table. However, until a 10-year trend is compiled, only those years for which information is available will be presented.

Data reported is measured as of June 30.

ANSER OF IDAHO, INC.

Schedule of Employer Contributions

PERSI - Base Plan

Last 10 - Fiscal Years*

	2019	2018	2017	2016	2015
Statutorily required contribution	$170,182	$169,360	$160,212	$138,424	$120,072
Contributions in relation to the statutorily required contribution	$170,182	$169,360	$160,212	$138,424	$120,072
Contribution deficiency (excess)	$0	$0	$0	$0	$0
School's covered payroll	$1,503,375	$1,496,113	$1,415,300	$1,222,827	$1,060,707
Contributions as a percentage of covered payroll	11.32%	11.32%	11.32%	11.32%	11.32%

*GASB 68 requires ten years of information to be presented in this table. However, until a 10-year trend is compiled, only those years for which information is available will be presented.

Data reported is measured as of each year's fiscal year end.

ANSER OF IDAHO, INC.

Combining Balance Sheet - Nonmajor Governmental Funds

June 30, 2019

	Special Revenue Funds		
	STEM	AAYC	Grant
Assets			
Cash		$31,207	$483
Receivables:			
Local Sources			
State Sources			
Federal Sources			
Due From Other Funds			
Total Assets	$0	$31,207	$483
Liabilities			
Accounts Payable		$797	
Due To Other Funds			
Salaries & Benefits Payable		7,243	
Prepaid Registration & Deposits		1,900	
Total Liabilities	$0	9,940	$0
Fund Balances			
Restricted:			
Special Programs		21,267	483
Debt Service			
Unassigned			
Total Fund Balances	0	21,267	483
Total Liabilities and Fund Balances	$0	$31,207	$483

ANSER OF IDAHO, INC.

Combining Balance Sheet - Nonmajor Governmental Funds

June 30, 2019

	Special Revenue Funds		
	Capital Campaign	Albertsons Fund	Technology
Assets			
Cash			$12,905
Receivables:			
Local Sources		$313	
State Sources			
Federal Sources			
Due From Other Funds			
Total Assets	$0	$313	$12,905
Liabilities			
Accounts Payable			$11,412
Due To Other Funds		$283	
Salaries & Benefits Payable			
Prepaid Registration & Deposits			
Total Liabilities	$0	283	11,412
Fund Balances			
Restricted:			
Special Programs		30	1,493
Debt Service			
Unassigned			
Total Fund Balances	0	30	1,493
Total Liabilities and Fund Balances	$0	$313	$12,905

ANSER OF IDAHO, INC.

Combining Balance Sheet - Nonmajor Governmental Funds

June 30, 2019

	Special Revenue Funds		
	Substance Abuse	IDEA Part B 611 School Age 3-21	Total
Assets			
Cash		$6,060	$50,655
Receivables:			
Local Sources			313
State Sources			0
Federal Sources			0
Due From Other Funds			0
Total Assets	$0	$6,060	$50,968
Liabilities			
Accounts Payable			$12,209
Due To Other Funds			283
Salaries & Benefits Payable		$6,060	13,303
Prepaid Registration & Deposits			1,900
Total Liabilities	$0	6,060	27,695
Fund Balances			
Restricted:			
Special Programs			23,273
Debt Service			0
Unassigned			0
Total Fund Balances	0	0	23,273
Total Liabilities and Fund Balances	$0	$6,060	$50,968

ANSER OF IDAHO, INC.

Combining Statement of Revenues, Expenditures, and Changes in Fund Balances - Nonmajor Governmental Funds

Year Ended June 30, 2019

	Special Revenue Funds		
	STEM	AAYC	Grant
Revenues			
Local Revenue	$2,870	$64,155	$720
State Revenue			1,220
Federal Revenue			
Total Revenues	2,870	64,155	1,940
Expenditures			
Instructional Programs			
Elementary School			700
Secondary School			
Special Education			
Gifted & Talented			
Support Service Programs			
Special Education Support Services			
Instruction Improvement			
Educational Media Program			
Instruction-Related Technology			
Board of Education Program			
District Administration Program			1,263
School Administration			
Business Operation			
Administrative Technology			
Buildings - Care			
Maintenance - Student Occupied			
Maintenance - Grounds			
Security			
Non-Instructional Programs			
Child Nutrition			
Community Services	2,870	47,393	
Capital Assets - Student Occupied			
Capital Assets - Non-Student Occupied			
Debt Service - Principal			
Debt Service - Interest			
Total Expenditures	2,870	47,393	1,963
Excess (Deficiency) of Revenues Over Expenditures	0	16,762	(23)
Other Financing Sources (Uses)			
Transfers In			
Transfers Out		(63,000)	
Total Other Financing Sources (Uses)	0	(63,000)	0
Net Change in Fund Balances	0	(46,238)	(23)
Fund Balances - Beginning	0	67,505	506
Fund Balances - Ending	$0	$21,267	$483

ANSER OF IDAHO, INC.

Combining Statement of Revenues, Expenditures, and Changes in Fund Balances - Nonmajor Governmental Funds

Year Ended June 30, 2019

	Special Revenue Funds		
	Capital Campaign	Albertsons Fund	Technology
Revenues			
Local Revenue		$31,541	
State Revenue			$87,736
Federal Revenue			
Total Revenues	$0	31,541	87,736
Expenditures			
Instructional Programs			
Elementary School			
Secondary School			
Special Education			
Gifted & Talented			
Support Service Programs			
Special Education Support Services			
Instruction Improvement			
Educational Media Program			
Instruction-Related Technology			96,321
Board of Education Program			
District Administration Program			
School Administration		31,511	
Business Operation			
Administrative Technology			
Buildings - Care			
Maintenance - Student Occupied			
Maintenance - Grounds			
Security			
Non-Instructional Programs			
Child Nutrition			
Community Services			
Capital Assets - Student Occupied			
Capital Assets - Non-Student Occupied			
Debt Service - Principal			
Debt Service - Interest			
Total Expenditures	0	31,511	96,321
Excess (Deficiency) of Revenues Over Expenditures	0	30	(8,585)
Other Financing Sources (Uses)			
Transfers In			
Transfers Out	(5,881)		
Total Other Financing Sources (Uses)	(5,881)	0	0
Net Change in Fund Balances	(5,881)	30	(8,585)
Fund Balances - Beginning	5,881	0	10,078
Fund Balances - Ending	$0	$30	$1,493

ANSER OF IDAHO, INC.

Combining Statement of Revenues, Expenditures, and Changes in Fund Balances - Nonmajor Governmental Funds

Year Ended June 30, 2019

	Special Revenue Funds		
	Substance Abuse	IDEA Part B 611 School Age 3-21	Total
Revenues			
Local Revenue			$99,286
State Revenue	$6,526		95,482
Federal Revenue		$42,740	42,740
Total Revenues	6,526	42,740	237,508
Expenditures			
Instructional Programs			
Elementary School			700
Secondary School			0
Special Education		42,740	42,740
Gifted & Talented			0
Support Service Programs			
Special Education Support Services			0
Instruction Improvement			0
Educational Media Program			0
Instruction-Related Technology			96,321
Board of Education Program			0
District Administration Program			1,263
School Administration			31,511
Business Operation			0
Administrative Technology			0
Buildings - Care			0
Maintenance - Student Occupied			0
Maintenance - Grounds			0
Security	6,526		6,526
Non-Instructional Programs			
Child Nutrition			0
Community Services			50,263
Capital Assets - Student Occupied			0
Capital Assets - Non-Student Occupied			0
Debt Service - Principal			0
Debt Service - Interest			0
Total Expenditures	6,526	42,740	229,324
Excess (Deficiency) of Revenues Over Expenditures	0	0	8,184
Other Financing Sources (Uses)			
Transfers In			0
Transfers Out			(68,881)
Total Other Financing Sources (Uses)	0	0	(68,881)
Net Change in Fund Balances	0	0	(60,697)
Fund Balances - Beginning	0	0	83,970
Fund Balances - Ending	$0	$0	$23,273

Independent Auditor's Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance With *Government Auditing Standards*

Board of Directors
Anser of Idaho, Inc.

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the Anser of Idaho, Inc. (the School), as of and for the year ended June 30, 2019, and the related notes to the financial statements, which collectively comprise the School's basic financial statements, and have issued our report thereon dated August 26, 2019.

Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the School's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The

11501 Highway 95, Payette, Idaho 83661 | www.qcpas.com | info@qcpas.com | 208-642-1417

results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control over financial reporting and compliance. Accordingly, this communication is not suitable for any other purpose.

Quest CPAs PLLC

Payette, Idaho
August 26, 2019

Appendix F3
Anser Professional Development and Work Plan 2019-2020

EL Education

Anser Charter School Work Plan - 2019-2020

Work Plan Overview:

	Mastery of Knowledge and Skills	Character	High Quality Work
Multi-Year Impact Goals	Anser students' academic achievement will improve in math, science, and ELA as the result of using student assessment data to inform instruction.	Anser students will contribute to a community of learning by demonstrating the character traits of compassion, discipline, respect, responsibility, courage, and integrity.	Anser Charter School students will produce high-quality work that reflects multiple perspectives, connects to big concepts within disciplines, and cultivates EL attributes of quality work.
2019-20 Performance Benchmarks	Anser students will achieve the following proficiency averages by grade level as measured by the spring Math ISAT: • 3rd-5th: 60% • 6th: 45% • 7th-8th: 60%	Anser students will demonstrate social-emotional competence, self-efficacy, self-regulation, and empathy by becoming allies and upstanders who reject and confront behaviors that disrupt a respectful culture. (same goal as last year)	Anser students will create high quality expedition products that demonstrate an authentic (real world) format, an authentic audience (see hierarchy of audience), and are assessed using student co-created scoring tools.
2019-20 Implementation Priorities	CP 15: Teaching Mathematics CP 30: Using Assessments to Boost Student Achievement	CP 22: Fostering Habits of Character	CP 7: Incorporating fieldwork, experts, and service learning CP 12: Planning for and supporting high quality student work
2019-20 Theory of Action	If we focus on the guiding stars of Anser (1. Agency is equity. 2. The future demands global competency. 3. Adventure breathes life into our learning and our lives. 4. Service is the heart of Anser.), we will see a positive impact in all three dimensions of student achievement. In this year's work plan, we are focusing on student agency (inquiry based learning through design thinking) and service learning (authentic audience for expedition products).		
2019-20 Leadership Goal	Anser will form an Instructional Leadership Team which will meet monthly for the purpose of evidence-based strategic improvement: Draft work plan goals, create a system for progress monitoring of work plan goals, conduct a Mid-Year Review to identify mid-course adjustments, and an end-of-year Implementation Review.		

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EL Education

Goals:

4-Year MKS Impact Goal: Anser students' academic achievement will improve in math, science, and ELA as the result of using student assessment data to inform instruction.
2019-20 MKS Performance Benchmarks: Anser students will achieve the following proficiency averages by grade level as measured by the spring Math ISAT: • 3rd-5th: 60% • 6th: 45% • 7th-8th: 60%
Rationale (How will this year's implementation priorities move you towards meeting this year's MKS Performance Benchmarks?): If Anser teachers use interim ISAT math assessments and analyze results, student spring ISAT math proficiency will improve at every grade level.
Implementation Priorities: CP 15: Teaching Mathematics CP 30: Using Assessments to Boost Student Achievement

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EL Education

Leadership and Faculty Learning Targets	Structures and Leadership Actions	EL Support and Services to build capacity	Data Points/Evidence for Monitoring Progress
I can administer at least two interim ISAT math assessments, invite students to collaboratively reflect on commonly missed questions, and use the data to differentiate math instruction (PMA for K-2 - beginning and mid-year). I can analyze differences and similarities between math curriculum assessments and ISAT interim assessments in service of preparing students for ISAT success.	Scheduled PD time with The Developmental Mathematical Thinking Initiative (DMTI) Group for 8 days during this school year. DMTI will work with K-8 teachers on units studies and co-teaching/model teaching those units fours this school year. Grade level team time for analysis with the DMTI group. Connecting the DMTI Framework to the Bridges Math Curriculum used in K-5 grades PD (fall retreat)..	Support for spring data analysis Support with protocols for disaggregating student data and item analysis.	**Evidence of Student Growth** **Baseline** Spring 2019 ISAT scores **Mid-Year:** By January (MYR), at least one interim assessment **End-of-Year:** Spring 2020 ISAT scores **Evidence of Staff Growth** **Baseline:** Credentialing data profile, downward trend in math proficiency for some grade levels **Mid-Year:** Analysis of at least one interim assessment Grade level action plan for differentiated instruction shared with whole staff **End-of-Year:** Analysis of at least one MORE interim assessment Grade level action plan for differentiated instruction shared with whole staff Spring 2020 ISAT scores

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4-Year Character Impact Goal:
Anser students will contribute to a community of learning by demonstrating the character traits of compassion, discipline, respect, responsibility, courage, and integrity.

2019-20 Character Performance Benchmarks:
Anser students will demonstrate social-emotional competence, self-efficacy, self-regulation, and empathy by becoming allies and upstanders who reject and confront behaviors that disrupt a respectful culture.

Rationale (How will this year's implementation priorities move you towards meeting this year's Character Performance Benchmarks?):
If Anser teachers implement the Second Step program with great fidelity (grade level specific lessons), and support students in making connections to Anser character traits and ELs character framework, students will demonstrate improvement in social-emotional competence, self-efficacy, self-regulation, and empathy.

Implementation Priorities:
CP 22: Fostering Habits of Character

Leadership and Faculty Learning Targets	Structures and Leadership Actions	EL Support and Services to build capacity	Data Points/Evidence for Monitoring Progress
I can implement the Second Step program at least three times a month and measure student growth through the use of pre and post inventories. I can implement the practice lessons and parent communication in order for students to transfer their learning within and beyond the classroom.	Support development and analysis of mid-year SEL student reflection Support grade level team time for Second Step lessons (Phase 2) PD on inquiry based learning through design thinking (method and mindset for students and staff)	PD on EL character framework…..connect to Anser character traits, Second Step program	**Evidence of Student Growth** **Baseline** Fall SEL survey **Mid-Year:** Mid-year student reflection (to be developed) **End-of-Year:** Spring SEL survey **Evidence of Staff Growth** **Baseline:** Notes from BOY staff conversation about Second Step **Mid-Year:** Analysis of MY student reflection and next steps **End-of-Year:**

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			Analysis of spring SEL survey

4-Year High-Quality Student Work Impact Goal:
Anser Charter School students will produce high-quality work that reflects multiple perspectives, connects to big concepts within disciplines, and cultivates EL attributes of quality work.

2019-20 Quality Work Performance Benchmarks:
Anser students will create high quality expedition products that demonstrate an authentic (real world) format, an authentic audience (see hierarchy of audience), and are assessed using student co-created scoring tools.

Rationale:
If we uplevel the authenticity of audience and format, and involve students in the creation of scoring tools, students will create expedition products that are high quality in the attribute of authenticity.

Implementation Priorities:
CP 7: Incorporating fieldwork, experts, and service learning, CP 12: Planning for and supporting high quality student work

Leadership and Faculty Learning Targets	Structures and Leadership Actions	EL Support and Services to build capacity	Data Points/Evidence for Monitoring Progress
I can develop product task descriptions with authentic format and authentic audience. I can support my students in the co-creation of product scoring tools.	Structure grade level team time on school designer days.	Support grade level teams in up-leveling authentic audience (hierarchy of audience). Support grade level teams in development of task descriptions with authentic format.	***Evidence of Student Growth*** **Baseline** Spring 2019 QWP **Mid-Year:** Fall expedition products **End-of-Year:** Spring 2020 QWP ***Evidence of Staff Growth*** **Baseline:** Spring 2019 QWP **Mid-Year:** MY modified QWP or structured discussion - sharing of task descriptions and co-created scoring tools.

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EL Education

			End-of-Year: Spring 2020 QWP

Leadership Goal: Anser will form an Instructional Leadership Team which will meet monthly for the purpose of evidence-based strategic improvement: Draft work plan goals, create a system for progress monitoring of work plan goals, conduct a Mid-Year Review to identify mid-course adjustments, and an end-of-year Implementation Review.
Rationale (How will this year's implementation priorities move you towards meeting all of this year's Performance Benchmarks?):
Implementation Priorities:

Leadership and Faculty Learning Targets	Structures and Leadership Actions	EL Support and Services to build capacity	Data Points/Evidence for Monitoring Progress
We can communicate work plan goals to the faculty and use data/evidence to regularly monitor the progress of those goals. We can work with grade level teams to facilitate expedition product planning - creating task descriptions (that include authentic format and audience) and plans for the co-creation of assessment tools (criteria lists). We can work with grade	Meet monthly Create agenda template with note section. Create or modify progress monitoring tools. Periodic walk-throughs - • EL Ethical people walk-through tools EL Education data.org	Support ILT during on-site visits.	*Evidence of Student Growth* **Baseline:** **Mid-Year:** **End-of-Year:** Meeting or exceeding all Performance Benchmarks in all three dimensions *Evidence of Staff Growth* **Baseline:** Score on Partnership Conditions Rubric **Mid-Year:** Increasing score on Partnership Conditions Rubric **End-of-Year:** IR Rubrics

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level teams to administer an ISAT interim math assessment by Thanksgiving break and the end of February, followed by an item analysis and action plan. We can regularly check-in with grade level teams to discuss the progress of Second Step.			

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EL Education

Anser Charter School- 2019-20 EL Education Professional Development Plan
The long-term goal is to build the internal capacity of every member of the school staff. In order to maximize your relationship with EL, it is essential that instructional leaders work alongside school designers whenever possible. Think strategically about how leaders and school designers' work with teachers or teams can impact school-wide implementation.

Use the calendar below to plan out how the learning and structures will be sequenced and scheduled in support of the goals.			
September 23-24 (Martha) Credentialing portfolio Work Plan Dimensions	October	November 18-19 (Martha) Meet with grade level teams on quality work goal. ILT meeting....walkthrough Help Michelle design PD agenda to support character goal.	December
January	February 11-12 (Martha) MYR with ILT	March	April 16-17 (Martha) 2-3 exhibition night (16th) QWP (17th) IR (17th)
May 5 (Martha) ILT - work planning	June	July	August 31 (Martha) Data inquiry work

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Appendix F4
3 Years of Anser Student Achievement Data

Anser Charter School

Education

STUDENT ACHIEVEMENT COMPARISON ISAT/IRI DATA 2018-2019 School Year

October, 2019

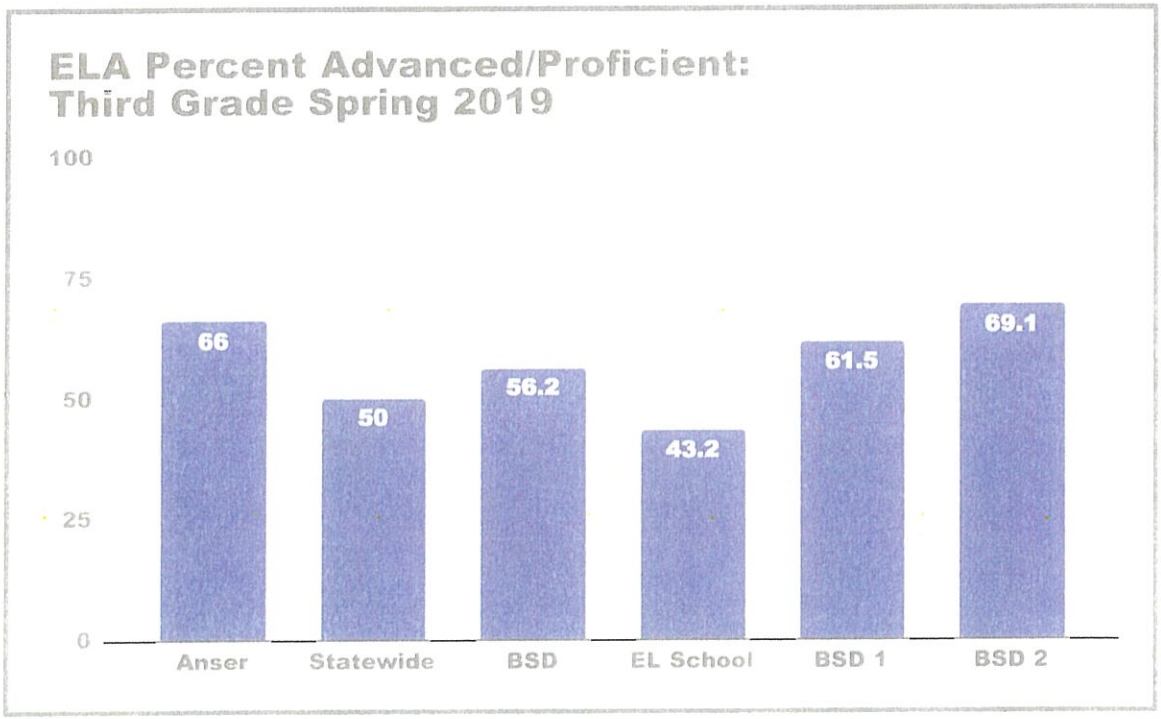
by

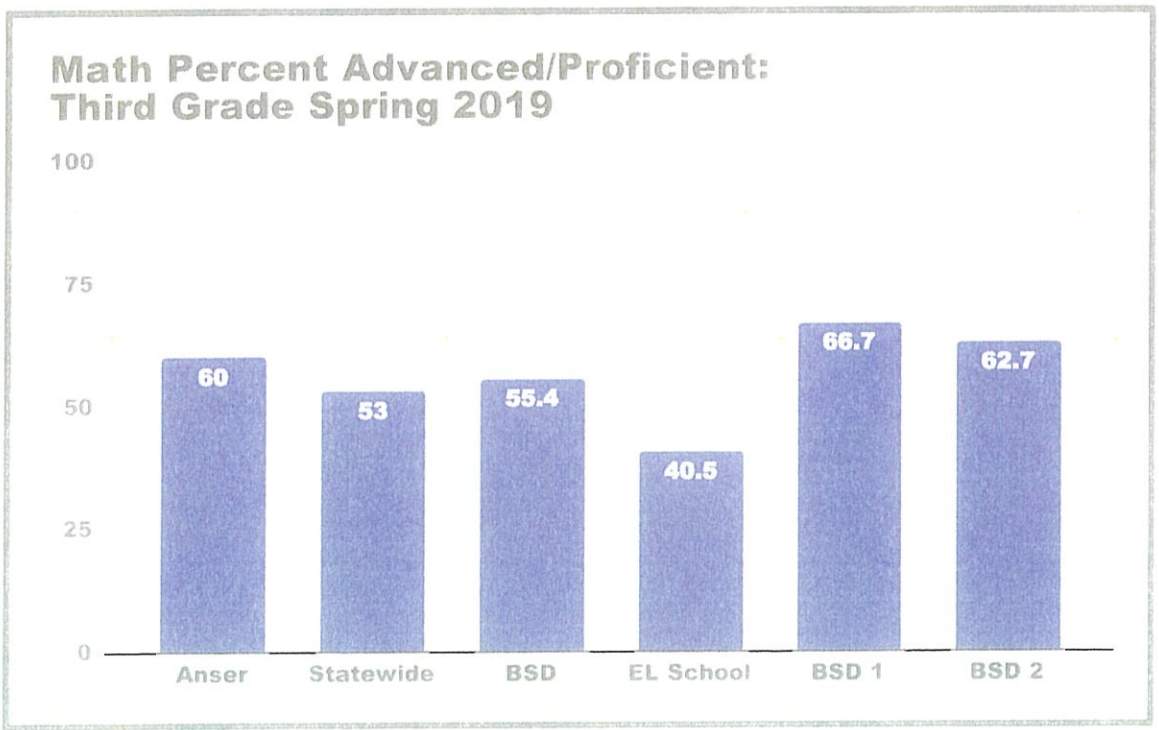
Michelle Dunstan
Anser Education Director

CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in third grade, Spring 2019. This group is compared to third grade students enrolled in a state EL Education School (K-8), two district elementary schools. BSD1: 11% Economically Disadvantaged, BSD 2: 12% and Anser: 19, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2018-2019: Grade 3	
Anser	4% (504 Plans = 3%)

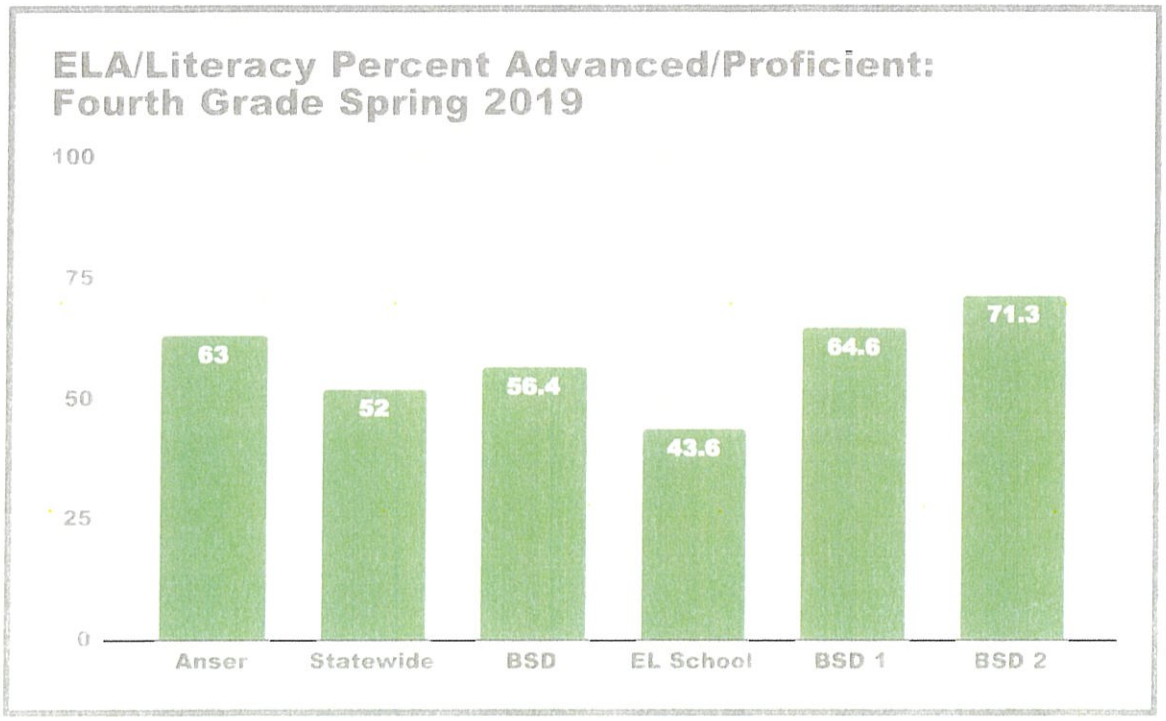


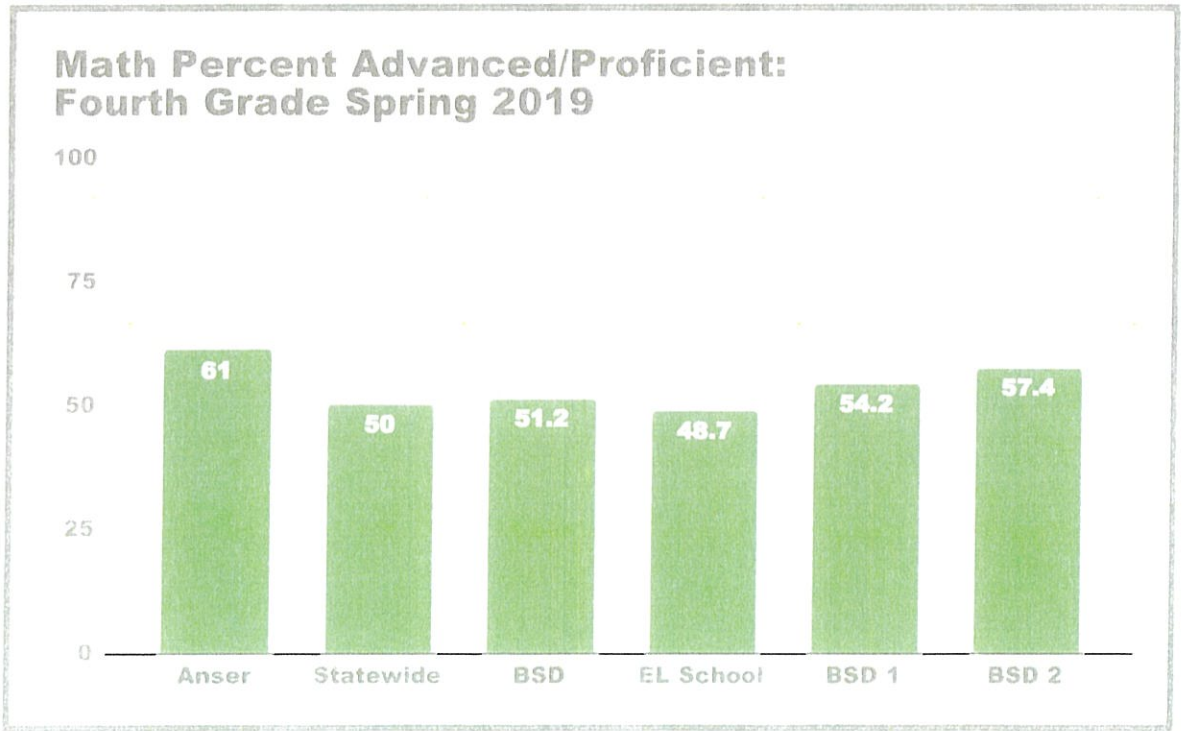


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in fourth grade, Spring 2019. This group is compared to fourth grade students enrolled in a state EL Education School (K-8), two district elementary schools. BSD1: 11% Economically Disadvantaged, BSD 2: 12% and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2018-2019: Grade 4	
Anser	5% (504 Plans = 4%)

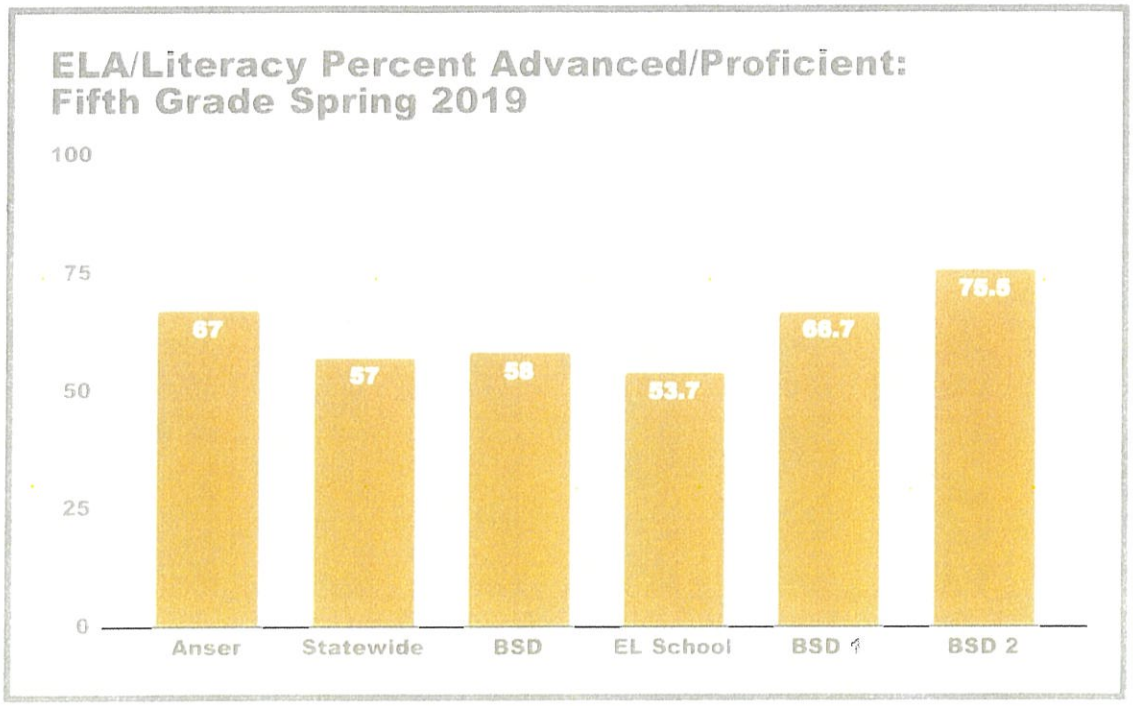


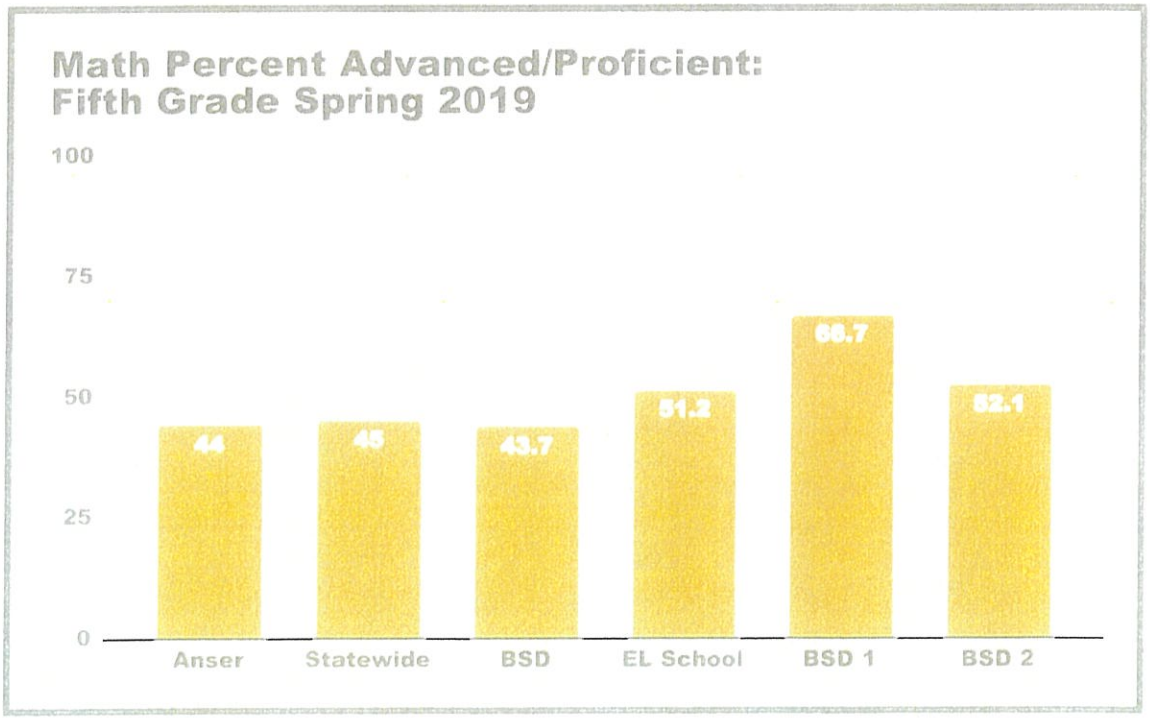


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in fifth grade, Spring 2019. This group is compared to fifth grade students enrolled in a state EL Education School (K-8), two district elementary schools. BSD1: 11% Economically Disadvantaged, BSD 2: 12% and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 5	
Anser	5% (504 Plans = 5%)

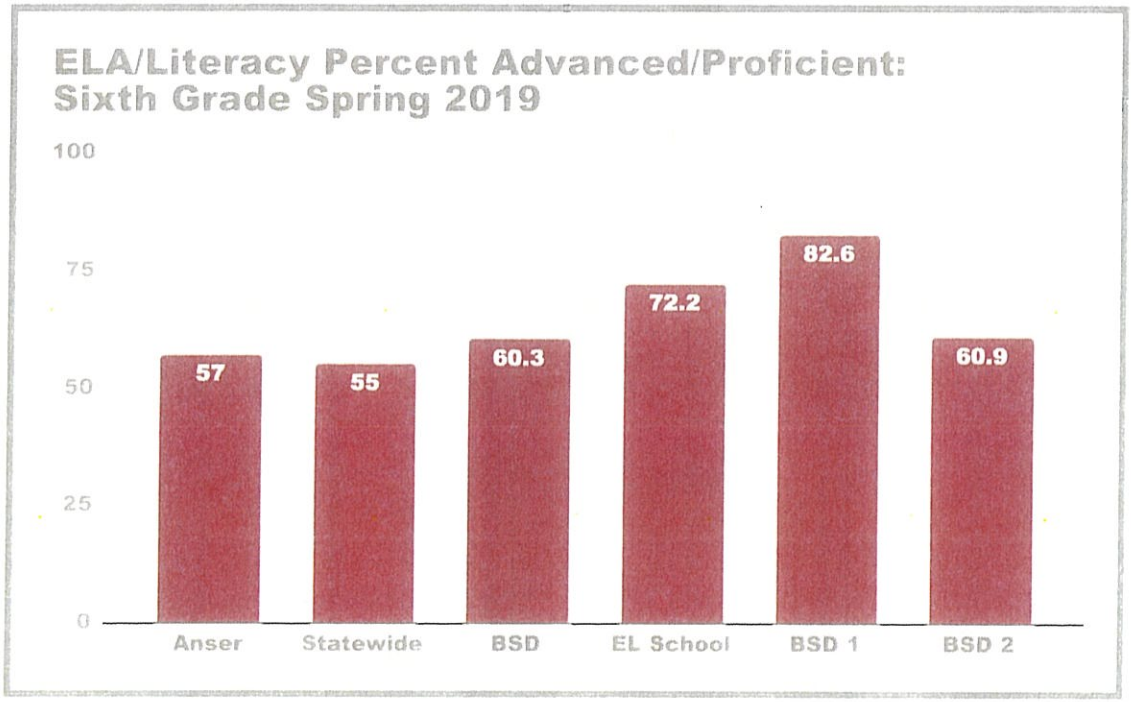


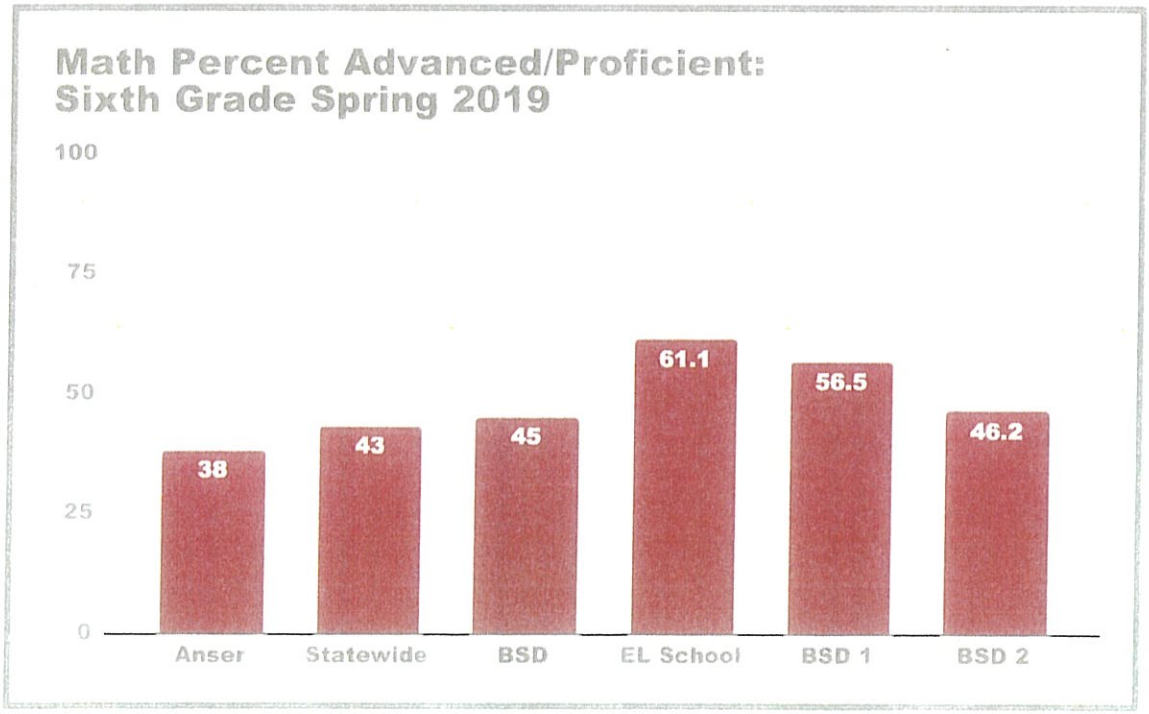


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in sixth grade, Spring 2019. This group is compared to sixth grade students enrolled in a state EL Education School (K-8), two district elementary schools. BSD1: 11% Economically Disadvantaged, BSD 2: 12% and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 6	
Anser	10% (504 Plans = 16 %)

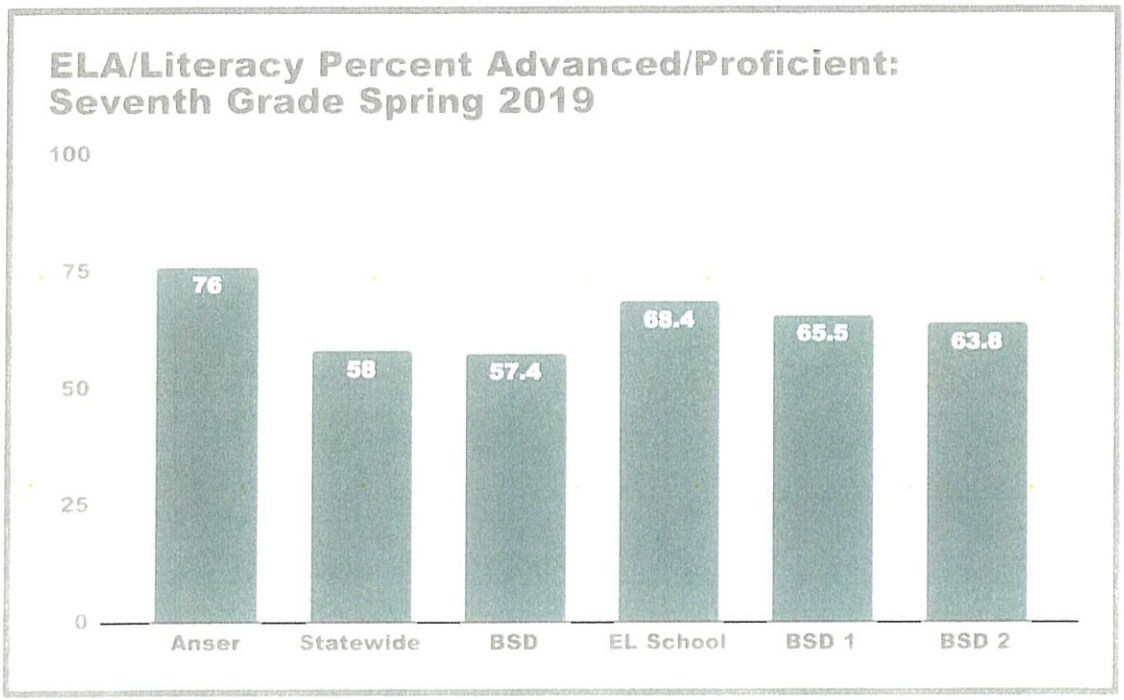


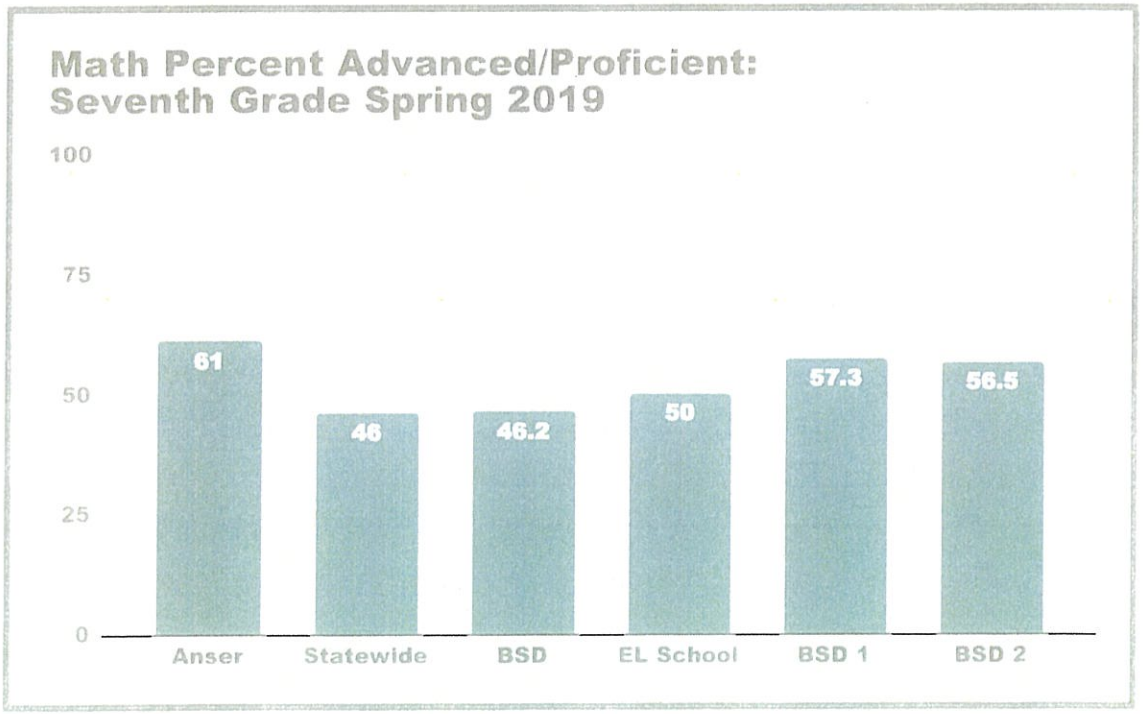


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in seventh grade, Spring 2019. This group is compared to seventh grade students enrolled in a state EL Education School (K-8), two district Junior High schools. BSD1: 19% Economically Disadvantaged, BSD 2: 19% and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 7	
Anser	5% (504 Plans = 7%)

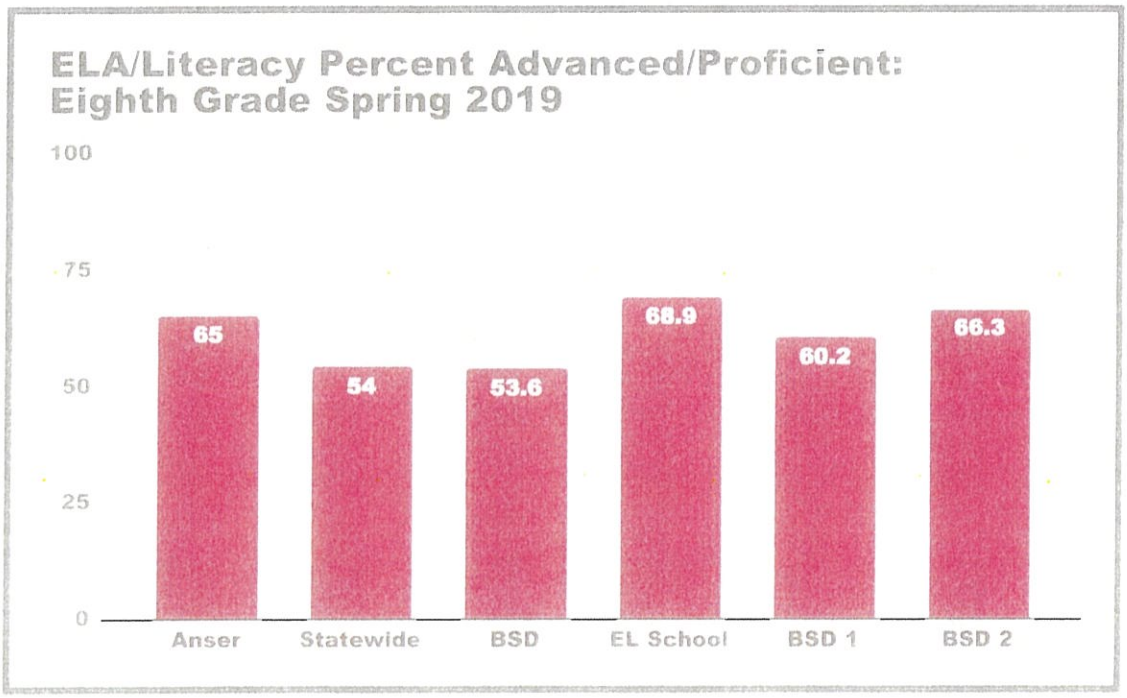


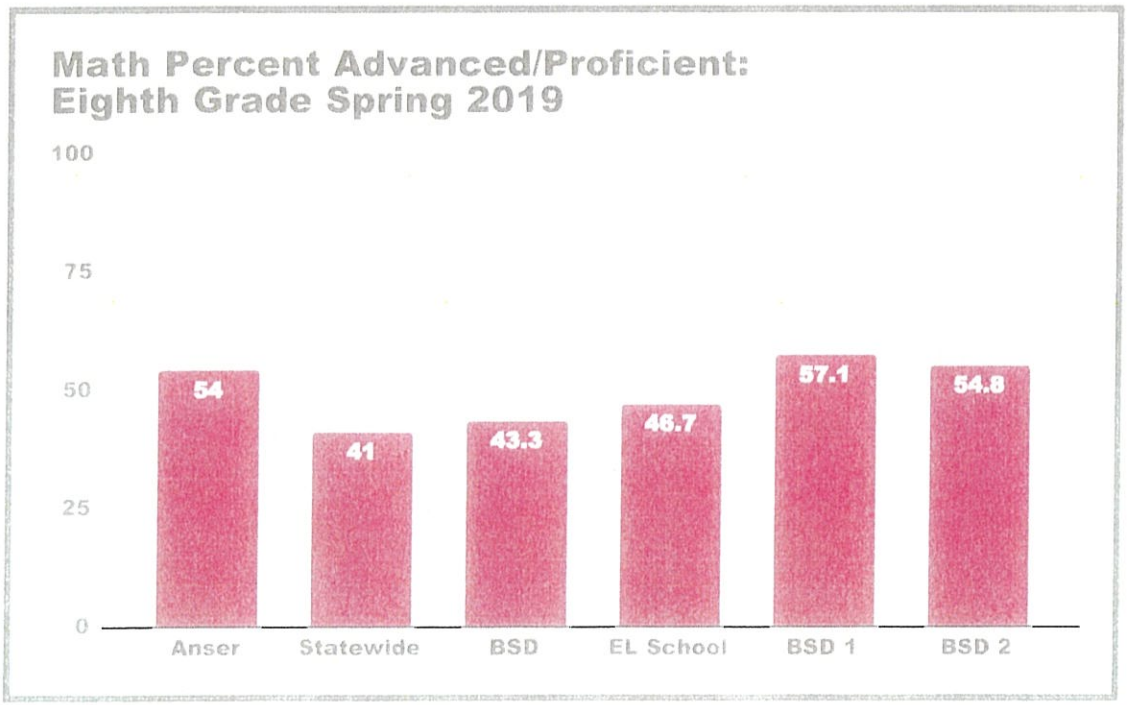


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in eighth grade, Spring 2019. This group is compared to eighth grade students enrolled in a state EL Education School (K-8), two district Junior High schools. BSD1: 19% Economically Disadvantaged, BSD 2: 19% and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 8	
Anser	7% (504 Plans = 3%)



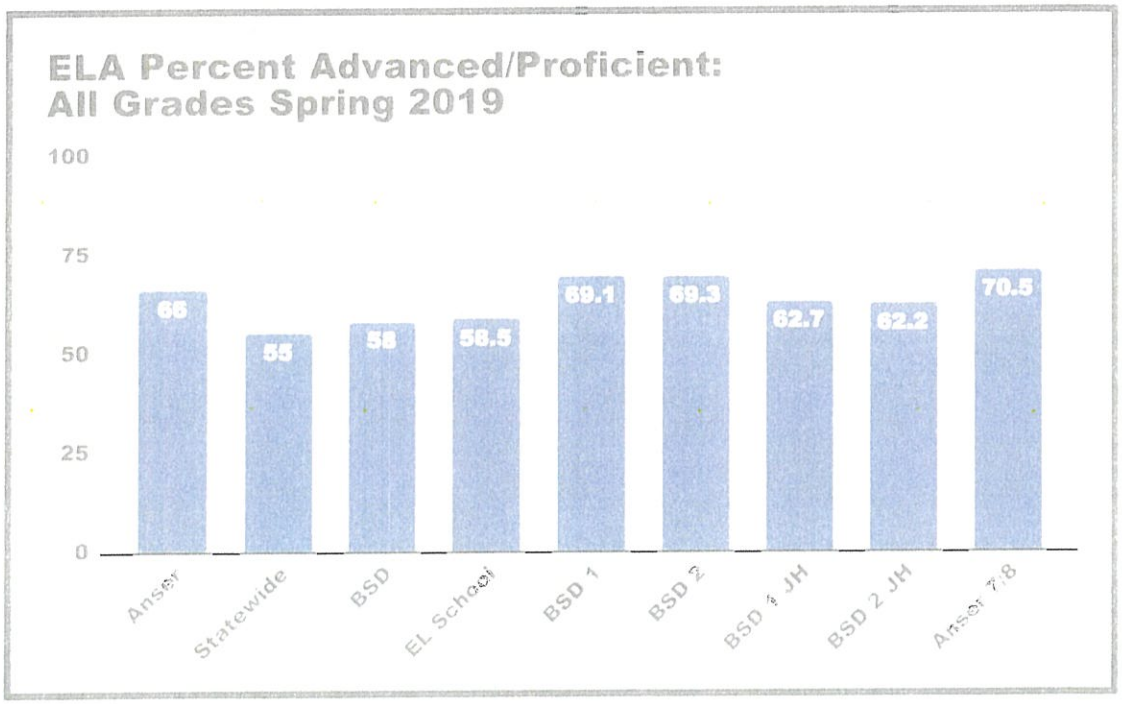


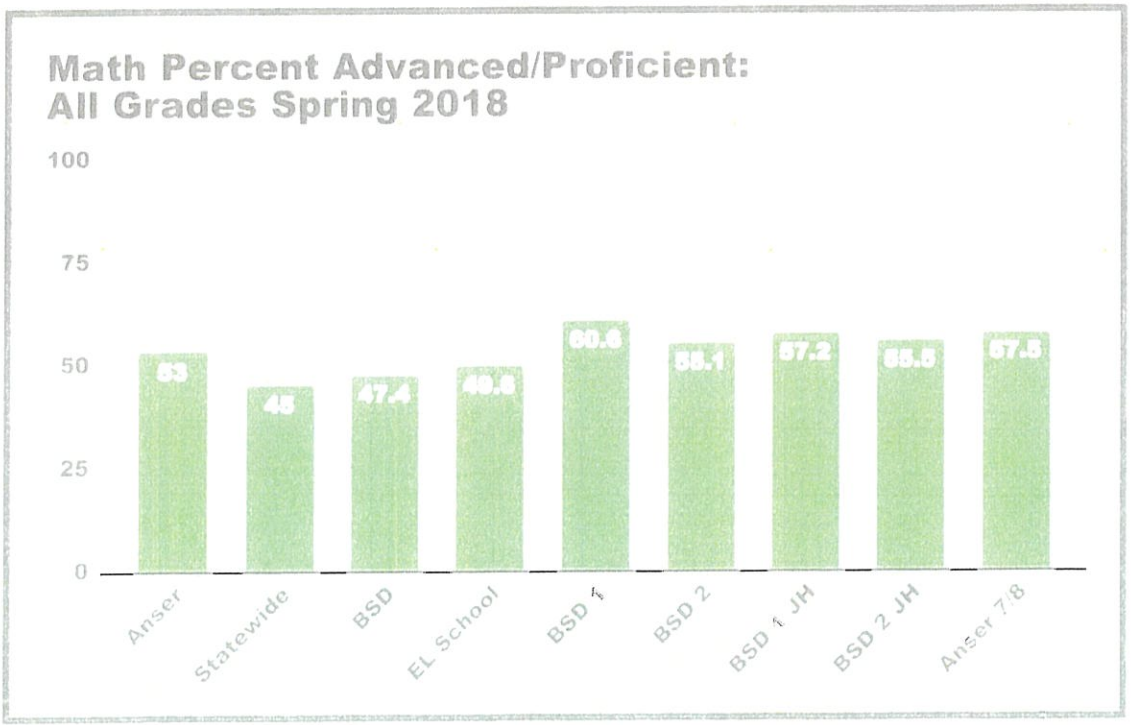
Idaho Standards Achievement Test: ALL GRADES (K-8)

ALL GRADE LEVEL COMPARATIVE ANALYSIS:

This group represents students enrolled in all grades, Spring 2019. This group is compared to K-6 students enrolled in a state EL Education School (K-8), two district elementary schools. BSD1: 11% Economically Disadvantaged, BSD 2: 12%, two district Junior High schools. BSD1: 19% Economically Disadvantaged, BSD 2: 19%, and Anser: 19%, but otherwise similar demographics(K-6), the Boise School District and the state.

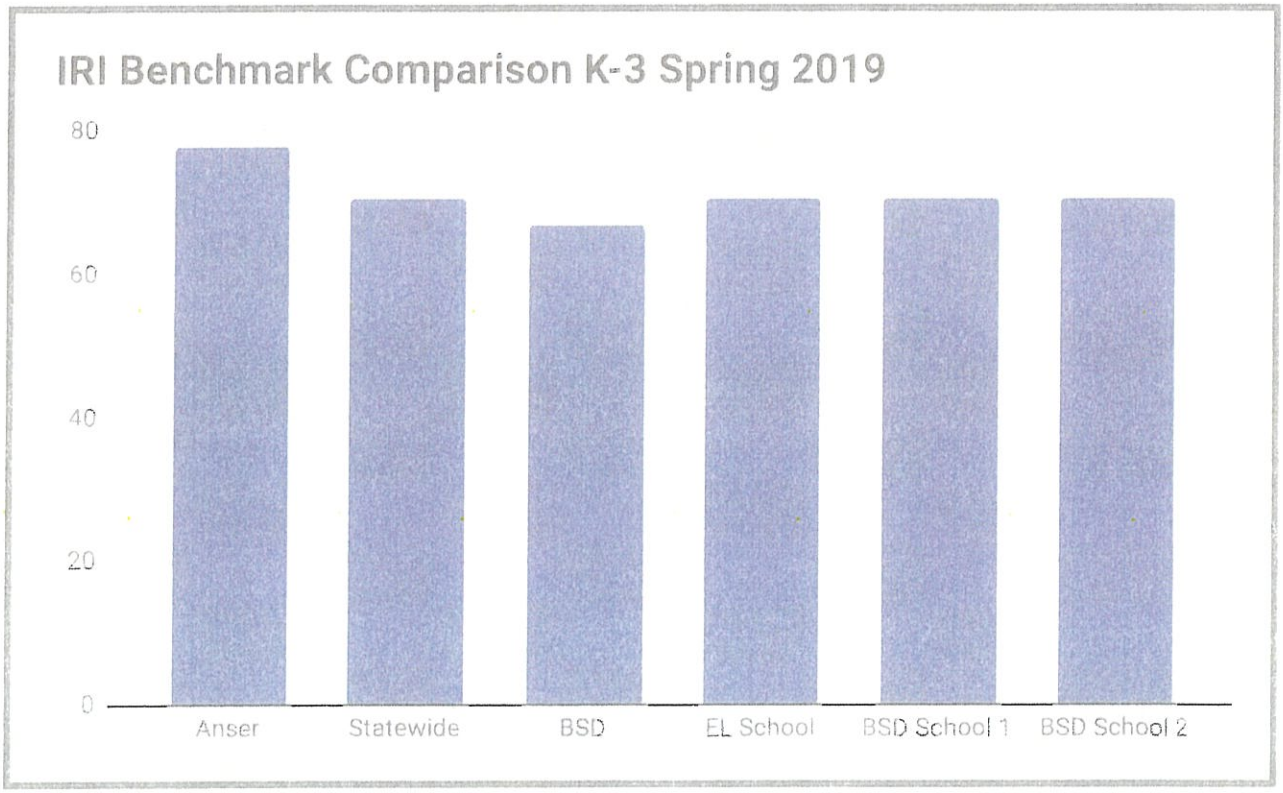
Percentage of Students Identified Special Education 2018-2019: ALL GRADES	
Anser K-6	7% (504 Plans = 7%)
Anser 7/8	12% (504 Plans = 5%)
Anser K-6	9% (504 Plans = 8%)





NEW Idaho Reading Indicator (IRI) Screening: K-3

The chart below represents class wide comparative data for Kindergarten - third grade students enrolled Spring 2019. The comparison groups include an EL Education school within the state of Idaho (also a credentialed EL Education School); two district schools with similar demographics, the Boise School District and the state of Idaho.



School Year Fall to Spring Change

School:	Percentage Point Change
Anser K-3	+17%
Boise	+9%
EL School	+19%
BSD1	+5%
BSD2	------

Anser Charter School

Education

STUDENT ACHIEVEMENT
2017-2018 School Year

Presented to Boise School District Board of Trustees

December, 2018

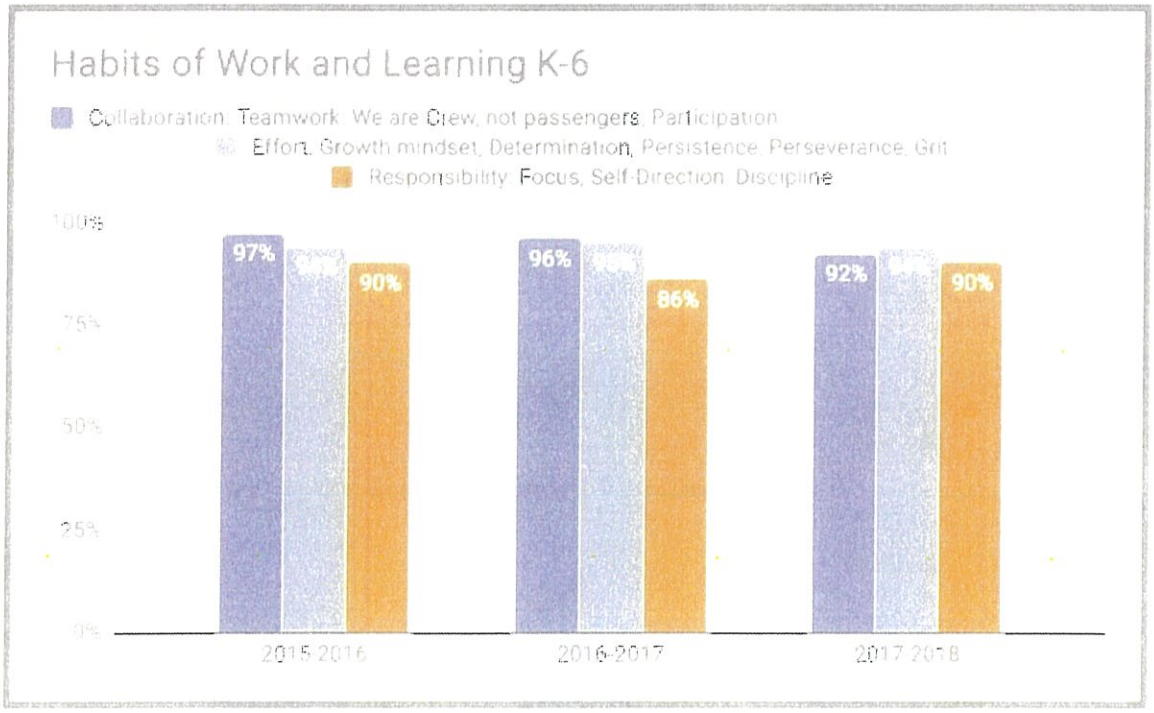
by

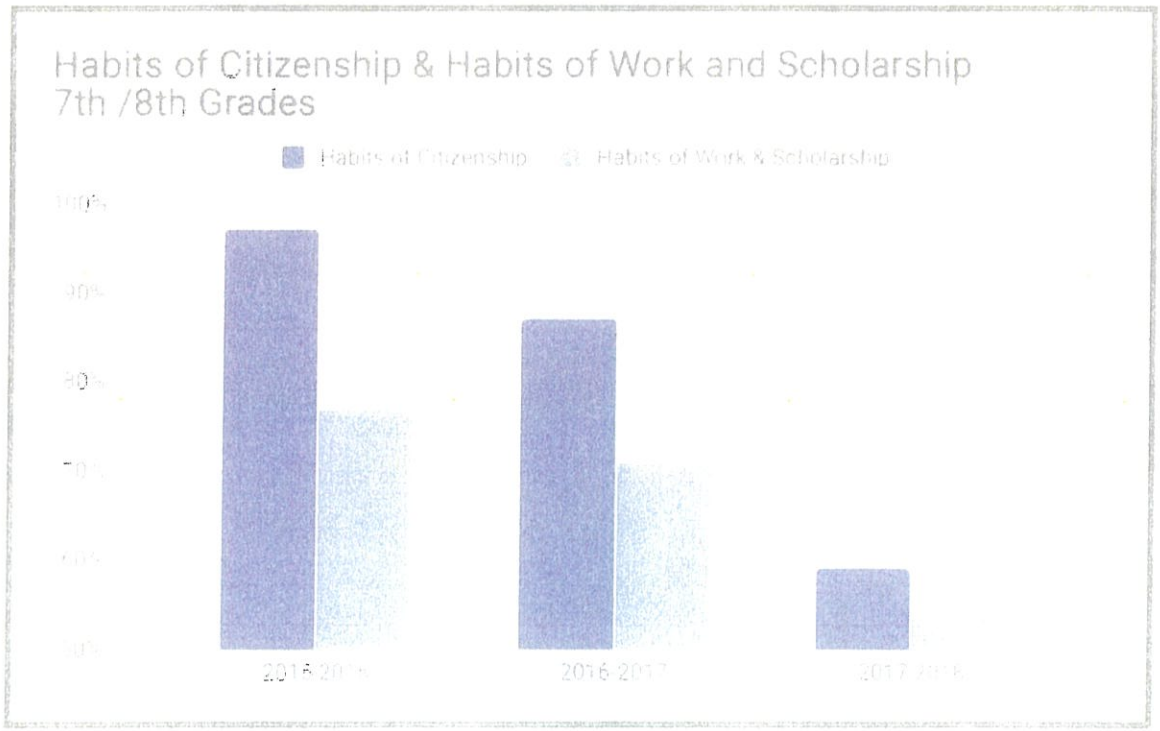
Michelle Dunstan
Anser Education Director

Character Joined to Scholarship: All Grades (K-8)

Student Character & Engagement:

This represents students enrolled at Anser, Spring 2016, 2017, and 2018. This data is collected from the final report card of the 2015-2016, 2016-2017 and 2017-2018 school years with the percentage of students meeting or exceeding expectations.





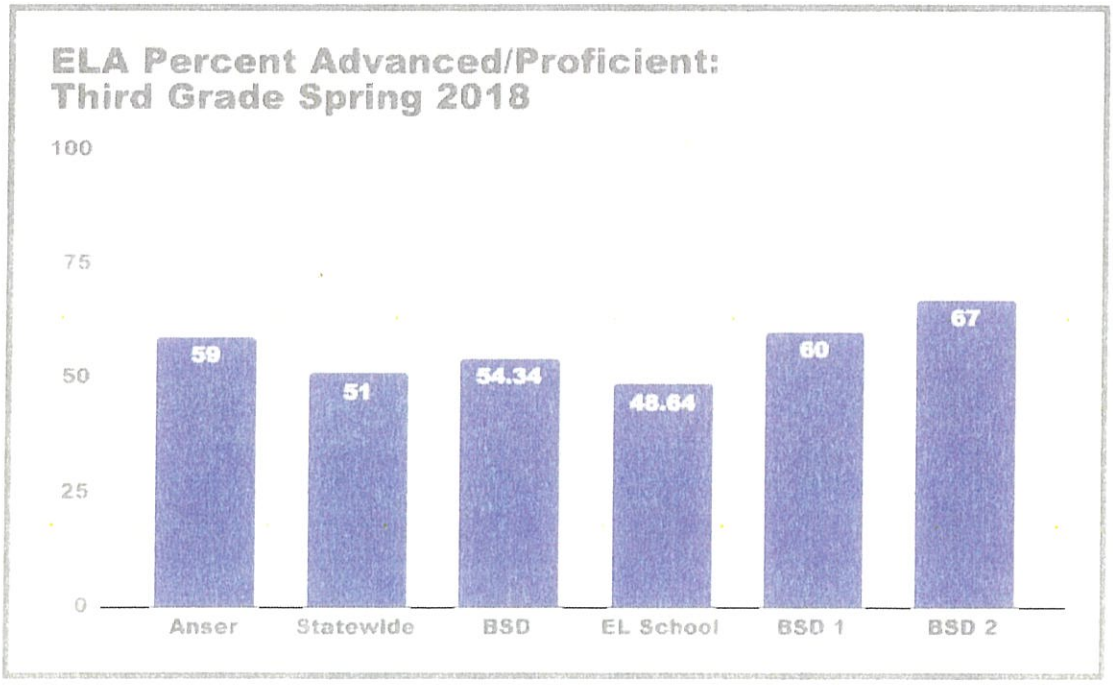
In August 2017, Anser's Board of Directors held a retreat to reaffirm the focus of the Board in supporting Anser's mission and to set the groundwork for a year of collaborative visioning for Anser's future. Throughout Fall 2017, Michelle and Heather led groups of board members, faculty, parents and students through protocols designed to engage people in identifying Anser's strengths, areas for growth, and the dreams and hopes they had for Anser's future. And while the many groups raised a variety of dreams and hopes, one area for focus that was raised among all the groups was adolescent learning and our 6th-8th grade program. All groups hoped for more opportunities for acceleration, academics grounded in student agency and deep, community centric opportunities in Adventure and Service, two Core Practices of EL Education.

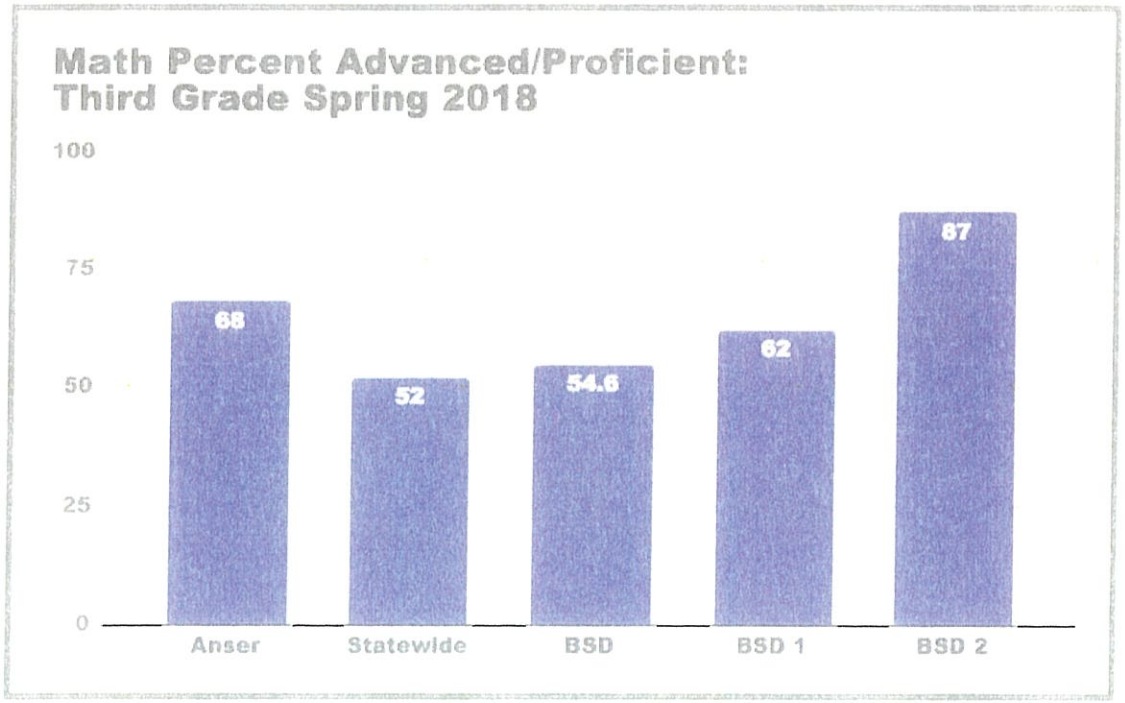
Out of this work, the Visioning Team of Anser was formed, which is comprised of the entire 6th-8th grade faculty and the administrators and works in conjunction with board, parent and student visioning advisory committees. Our work began in the Spring of 2018 to unravel the mystery of what we were seeing in our school, and in adolescent culture at large, how to prepare our students for a future we can't anticipate, while supporting students where they are now, in what seems to be a world very different from that of our own youth. The focus of this work is responding to the need we see in the Junior High Habits of Citizenship and Habits of Work & Scholarship data.

CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in third grade, Spring 2018. This group is compared to third grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), the Boise School District and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 3	
Anser	5% (504 Plans = 2%)

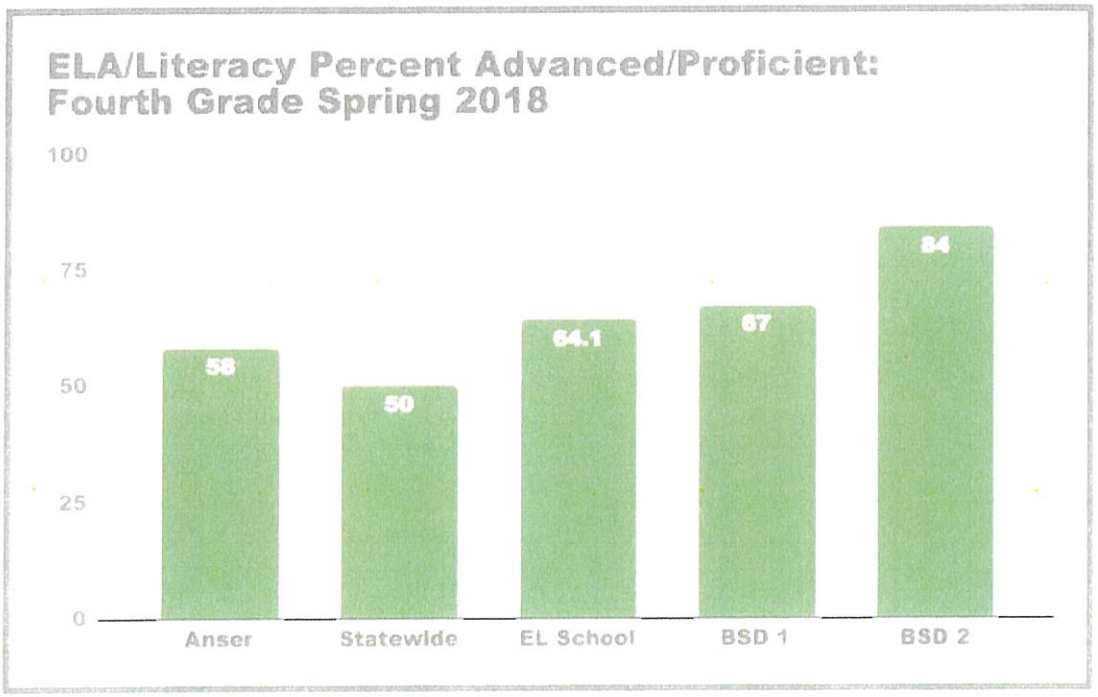


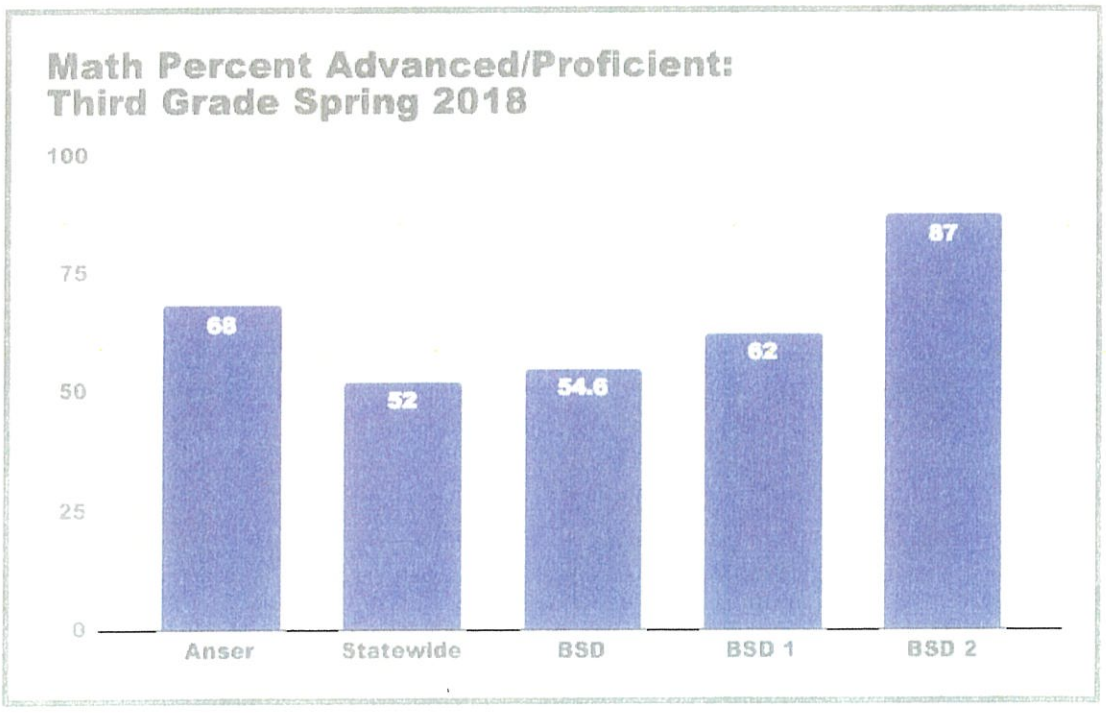


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in fourth grade, Spring 2018. This group is compared to fourth grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 4	
Anser	11.1% (504 Plans = 8.3%)

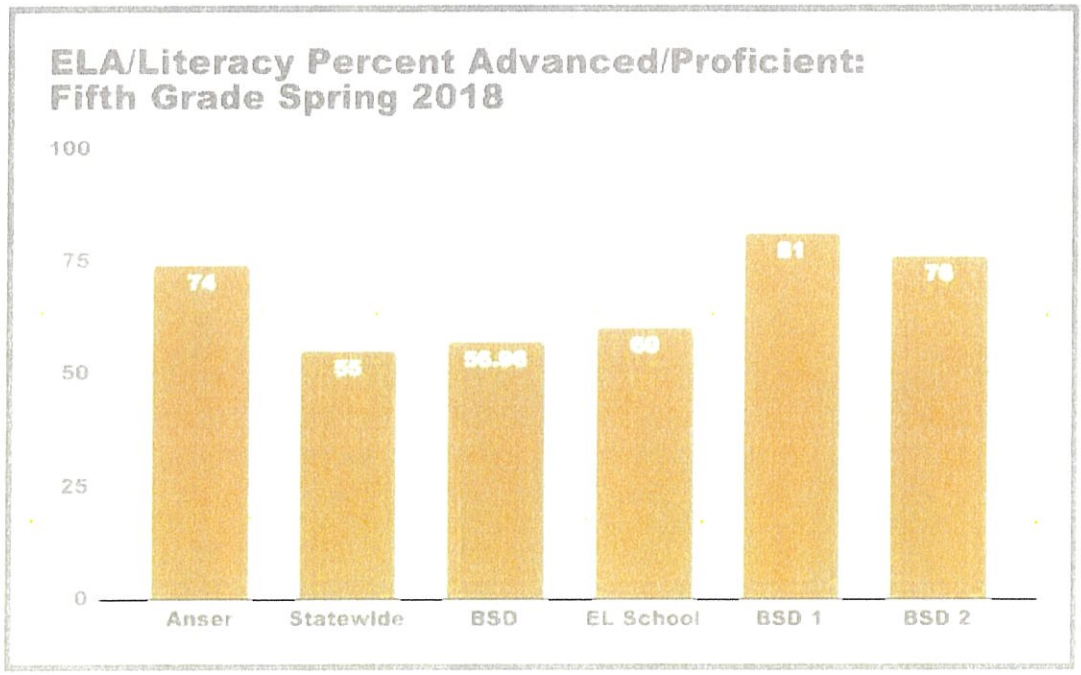


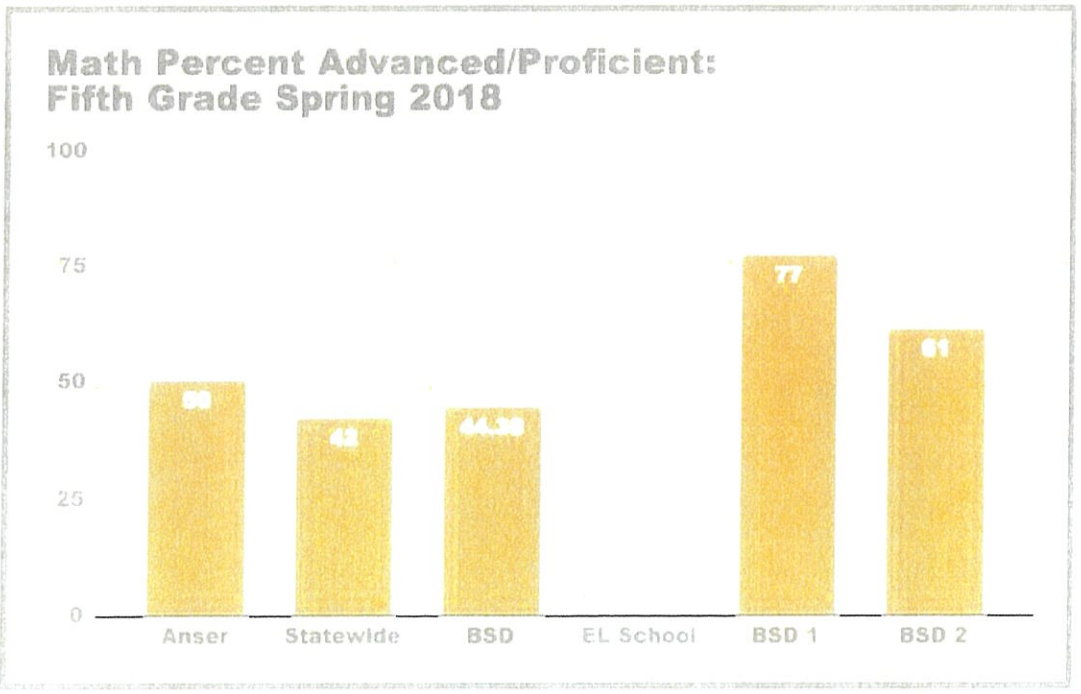


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in fifth grade, Spring 2018. This group is compared to fifth grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 5	
Anser	9.5% (504 Plans = 13%)

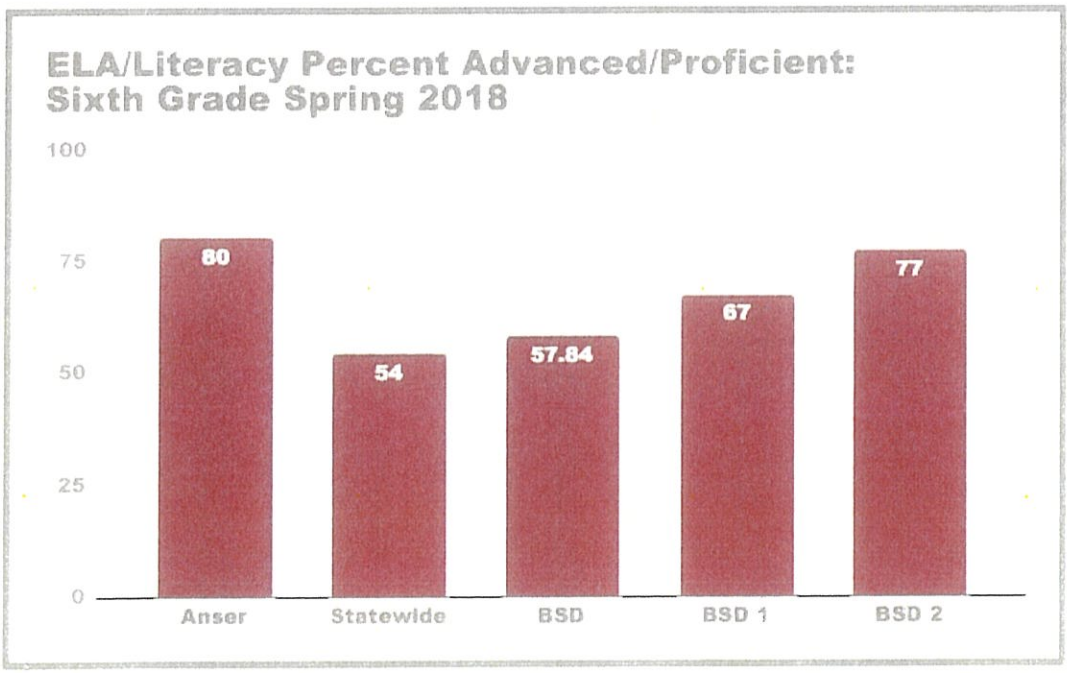


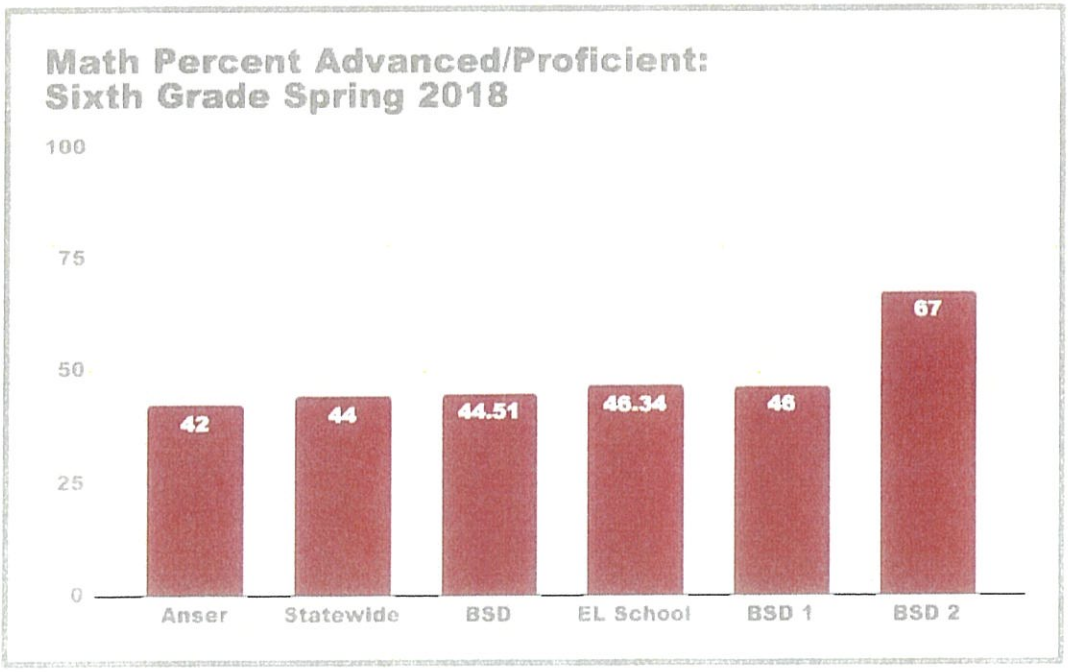


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in sixth grade, Spring 2018. This group is compared to sixth grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 6	
Anser	10% (504 Plans =8 %)

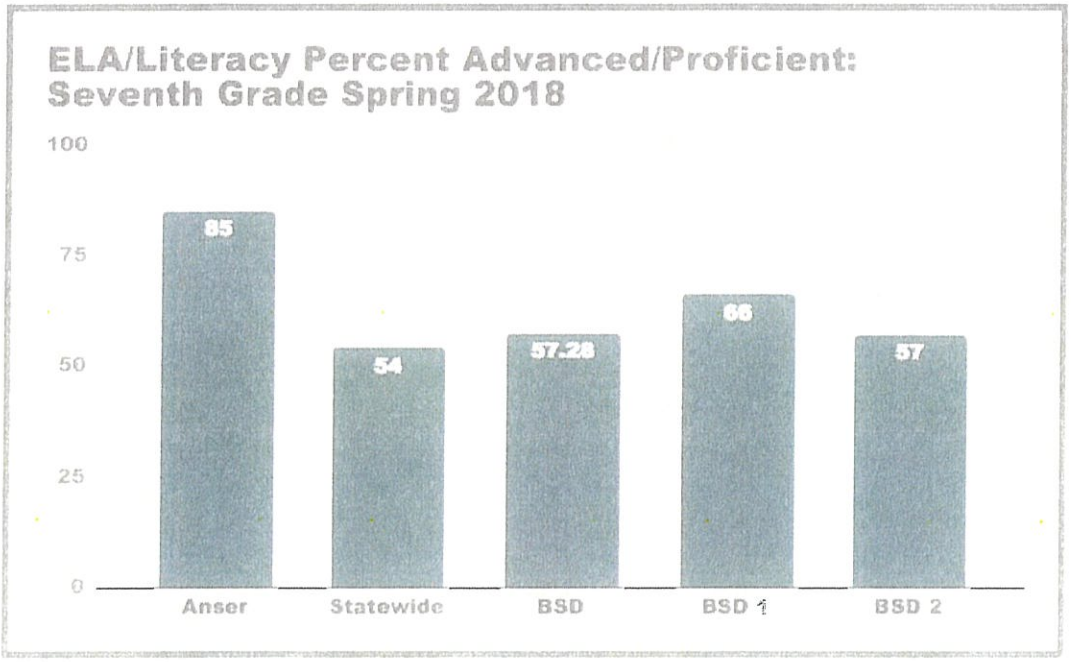


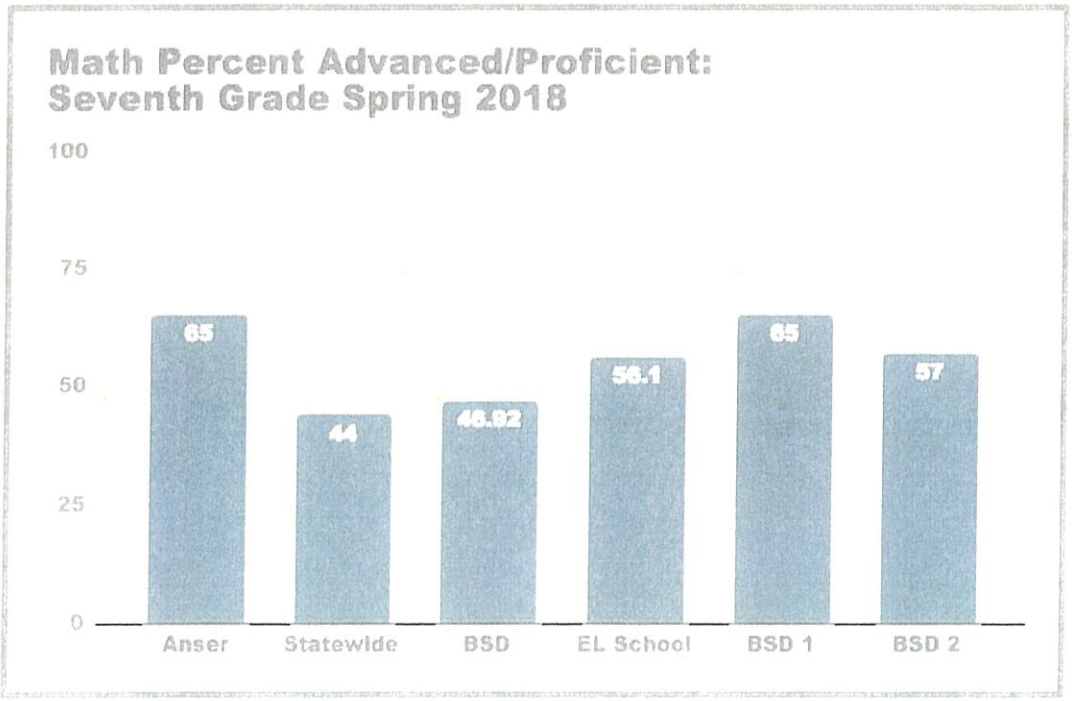


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in seventh grade, Spring 2018. This group is compared to seventh grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 7	
Anser	19.2% (504 Plans = 2%)

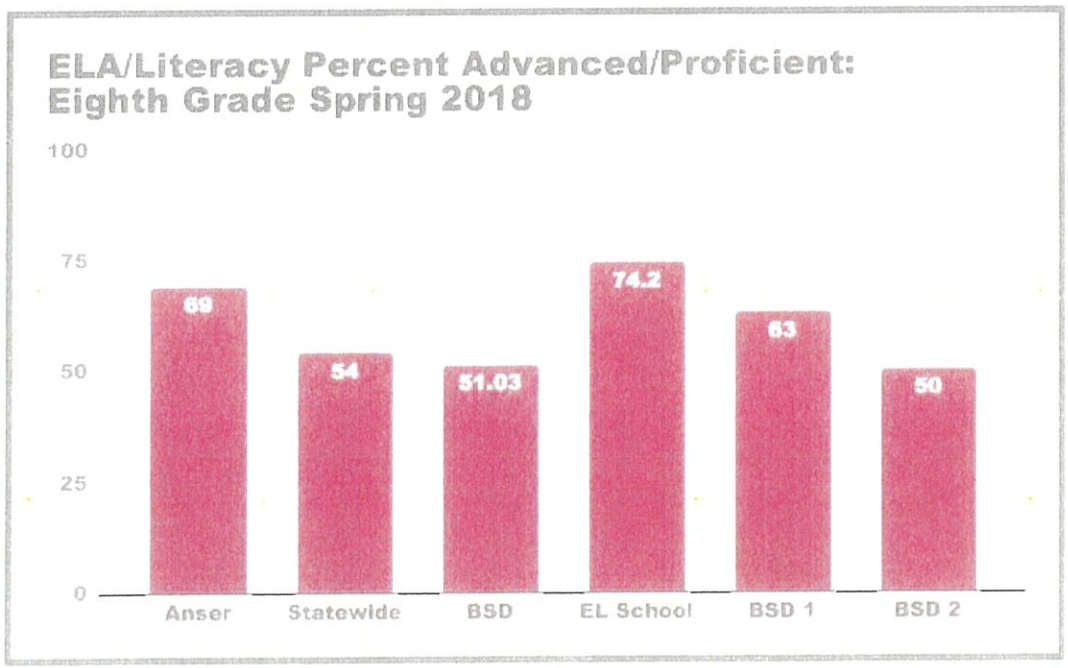


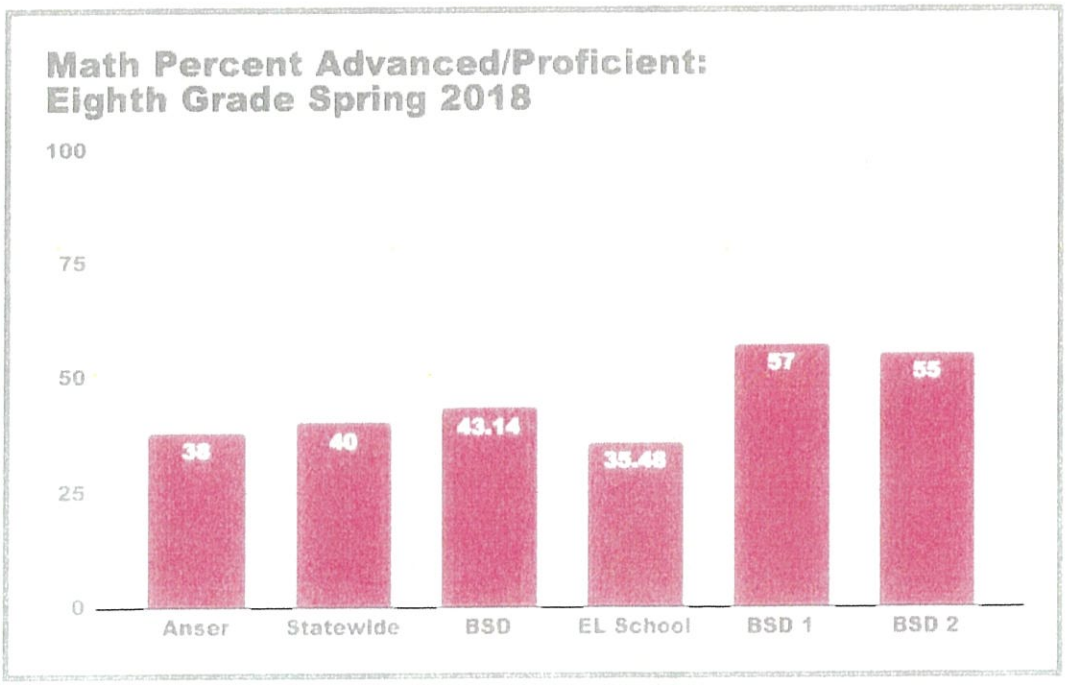


CLASS WIDE COMPARATIVE ANALYSIS:

This group represents students enrolled in eighth grade, Spring 2018. This group is compared to eighth grade students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

Percentage of Students Identified Special Education 2017-2018: Grade 8	
Anser	9% (504 Plans = 9%)



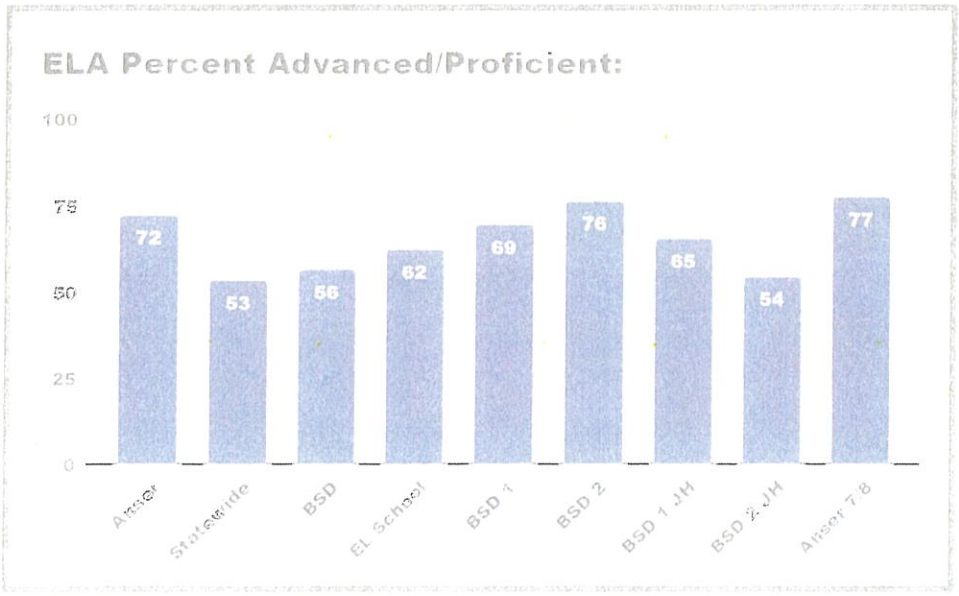


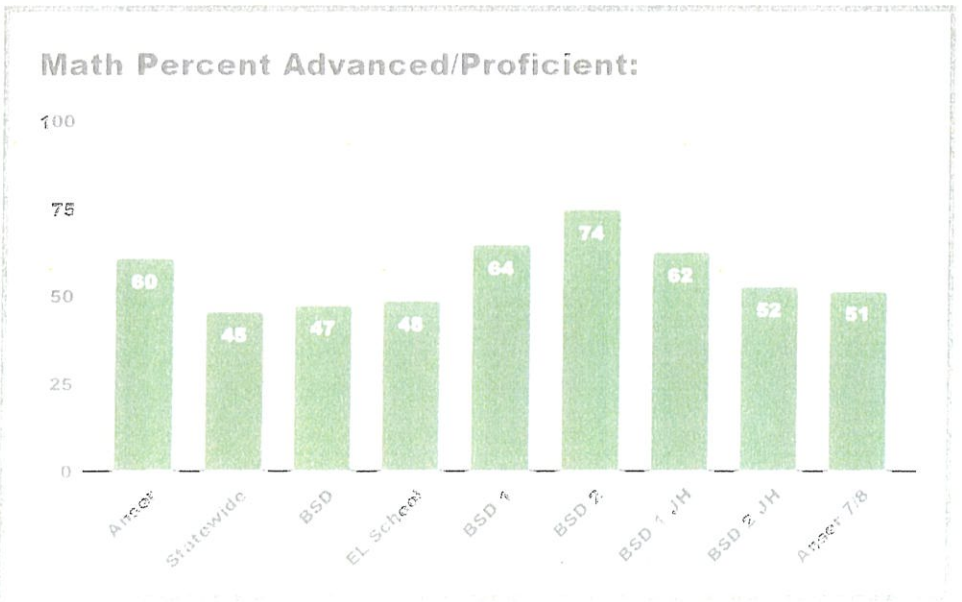
Idaho Standards Achievement Test: ALL GRADES (K-6)

ALL GRADE LEVEL COMPARATIVE ANALYSIS:

This group represents students enrolled in all grades, Spring 2018. This group is compared to all grades of students enrolled in a state EL Education School (K-8), two high performing district elementary schools (K-6), and the Boise School district and the state.

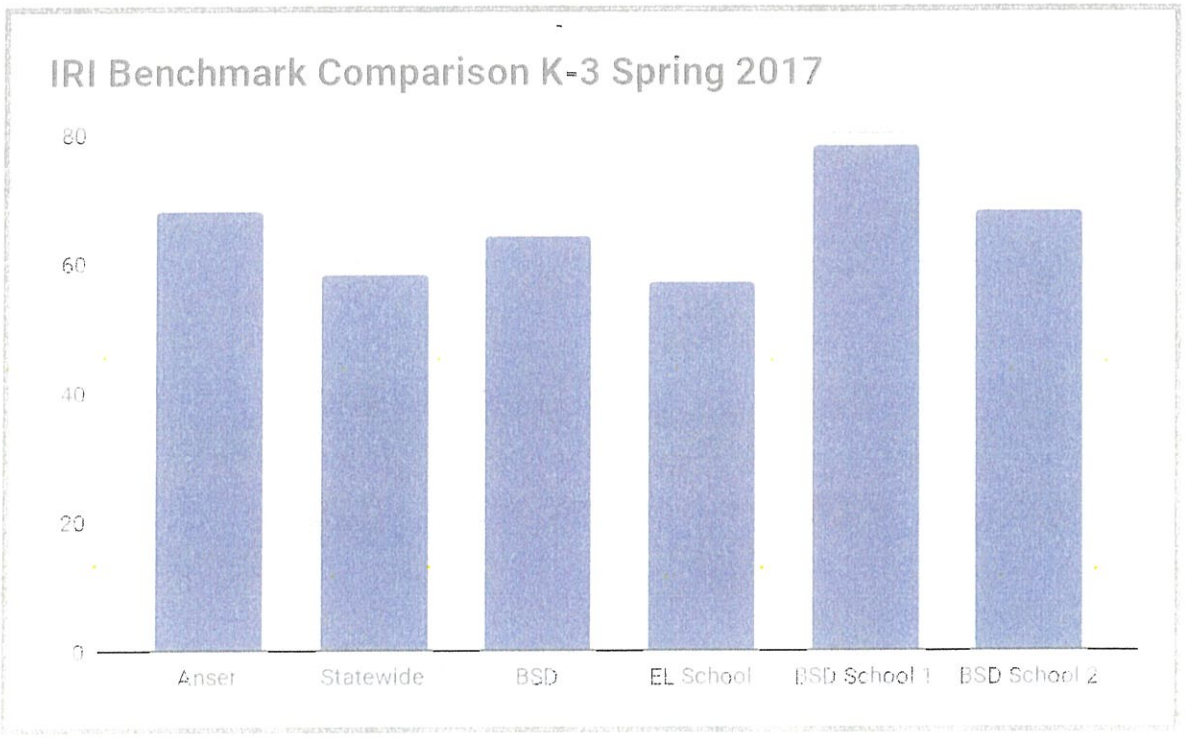
Percentage of Students Identified Special Education 2017-2018: ALL GRADES	
Anser K-6	8.9% (504 Plans = 7.8%)
BSD 1	10%
BSD 2	14%
Anser 7/8	14.1% (504 Plans = 5.5%)
BSD 1 JH	10%
BSD 2 JH	10%





Idaho Reading Indicator (IRI) Screening: K-3

The chart below represents class wide comparative data for Kindergarten students enrolled Spring 2018. The comparison groups include an EL Education school within the state of Idaho (also a credentialed EL Education School); two high performing district schools with similar demographics, the Boise School District and the state of Idaho.



New IRI Fall 2018: K-3

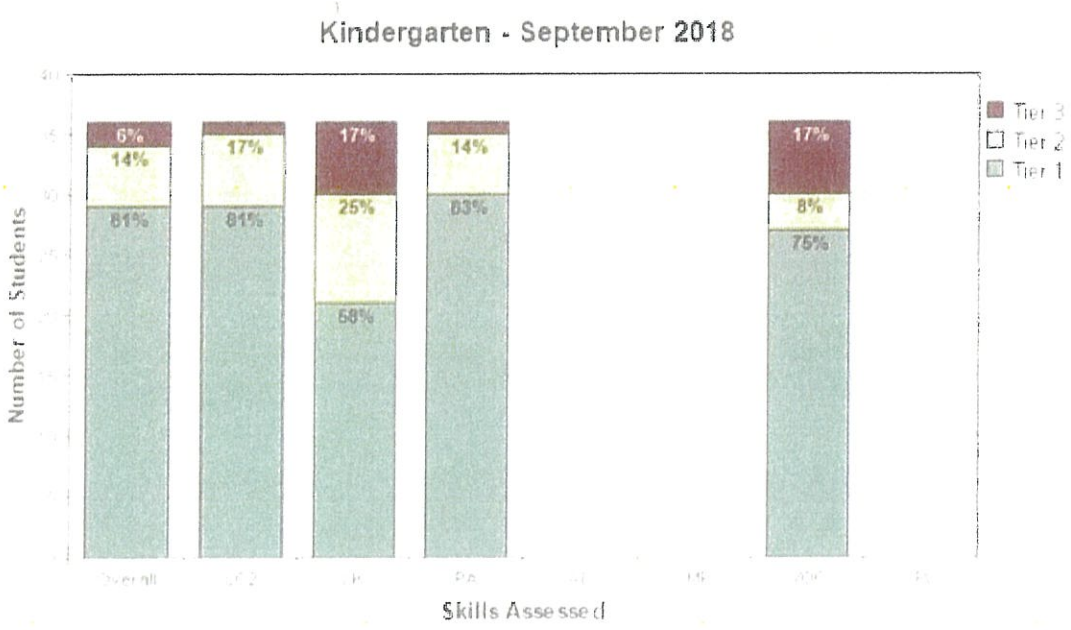
As we begin this new year with a new assessment tool for primary grade, Anser teachers have reflected and share the following:

My thoughts are that this new assessment provides a more well-rounded view of what the children seem to know. I also appreciate the lessons they provide and the way they categorize the specific areas for us to work on with the children.

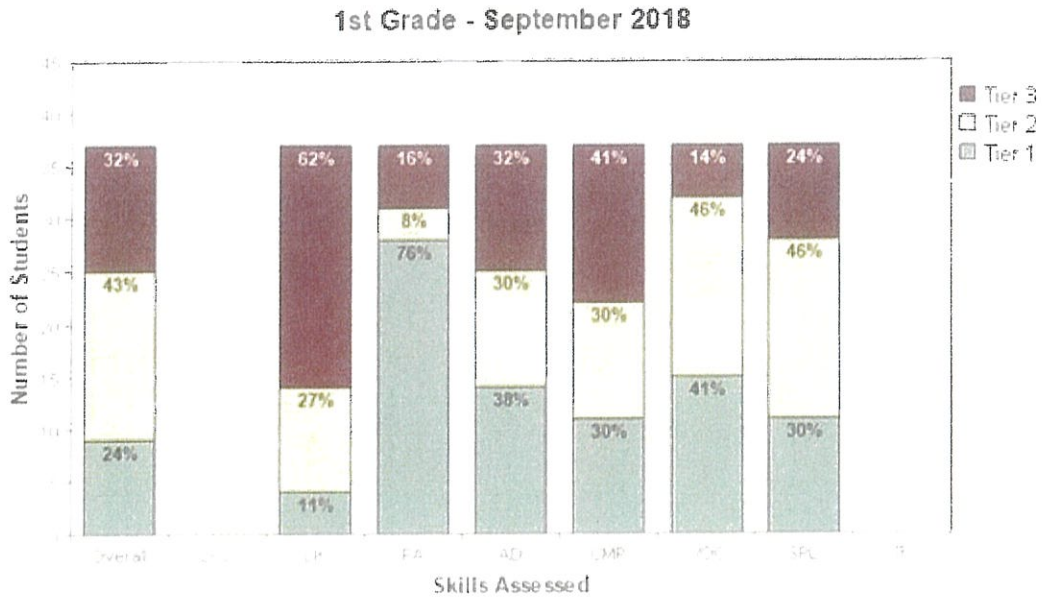
It has a broader perspective and also is less stressful for the kids to take.

The new IRI is a more comprehensive assessment of students reading skills. In the past we were only assessing how fast the students could read. This assessment gives us information on their decoding, comprehension and spelling. I noticed some third graders that could read 175 wpm but they were lower in decoding, spelling, or comprehension. It gives us the opportunity to really target the skills the students are needing to be solid readers and not have any gaps in their skills.

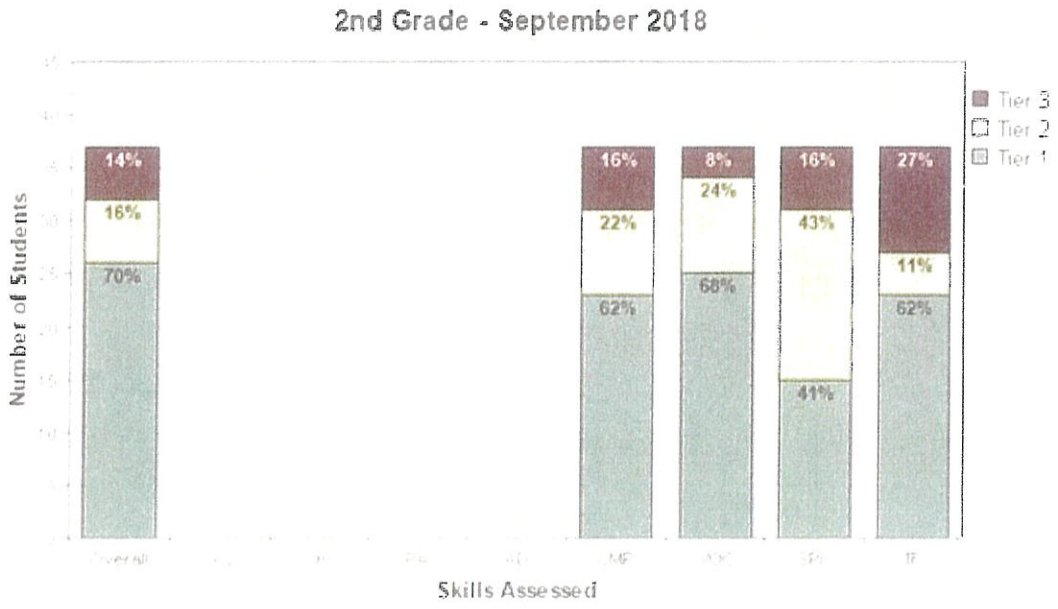
Although I somewhat agree with my esteemed colleagues, I also am not yet convinced that this new assessment accurately reflects the students' skills as it does not fully align with data I am collecting with my one-on-one assessments. Of course, most anything would be better than basing reading mastery on only speed, I question whether a fully technology-based assessment is the best tool for this age. I am interested in seeing how this assessment measures students' growth over the year and how that is or is not congruent with the skills they are demonstrating in the classroom. We shall see!



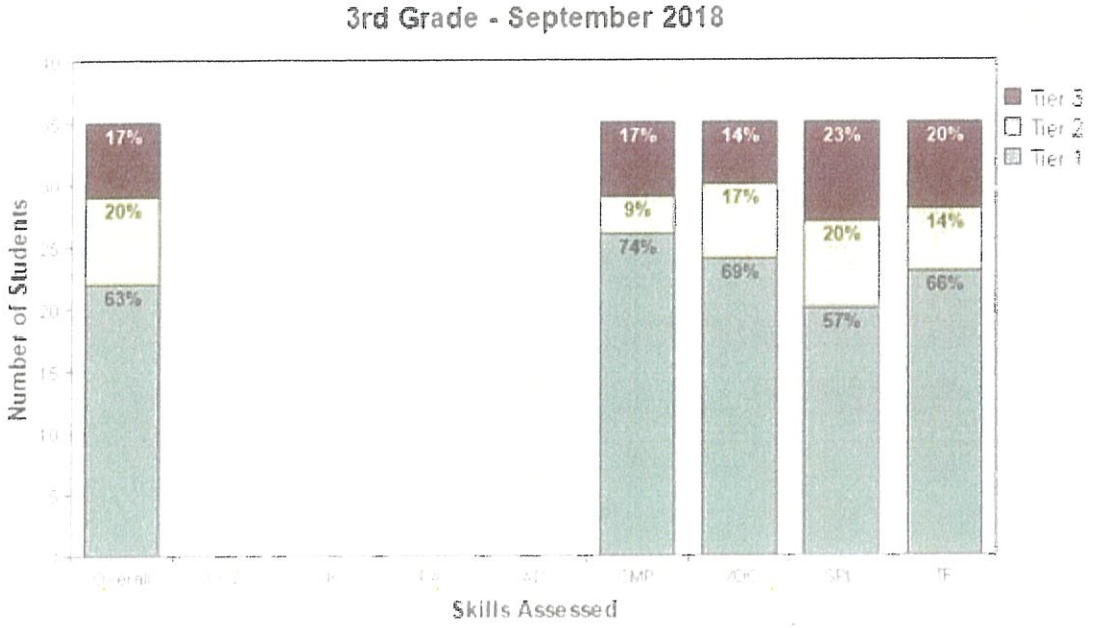
Kindergarten - Fall IRI	At Grade Level	Near Grade Level	Below Grade Level
Overall	81%	14%	6%
Listening Comprehension	81%	17%	2%
Letter Knowledge	58%	25%	17%
Phonemic Awareness	83%	14%	3%
Vocabulary	75%	8%	17%



1st Grade - Fall IRI	At Grade Level	Near Grade Level	Below Grade Level
Overall	24%	43%	32%
Letter Knowledge	11%	27%	62%
Phonemic Awareness	76%	8%	16%
Alphabetic Decoding	38%	30%	32%
Comprehension	30%	30%	41%
Vocabulary	41%	46%	14%
Spelling	30%	46%	24%



2nd Grade - Fall IRI	At Grade Level	Near Grade Level	Below Grade Level
Overall	70%	16%	14%
Comprehension	62%	22%	16%
Vocabulary	68%	24%	8%
Spelling	41%	43%	16%
Text Fluency*	62%	11%	27%



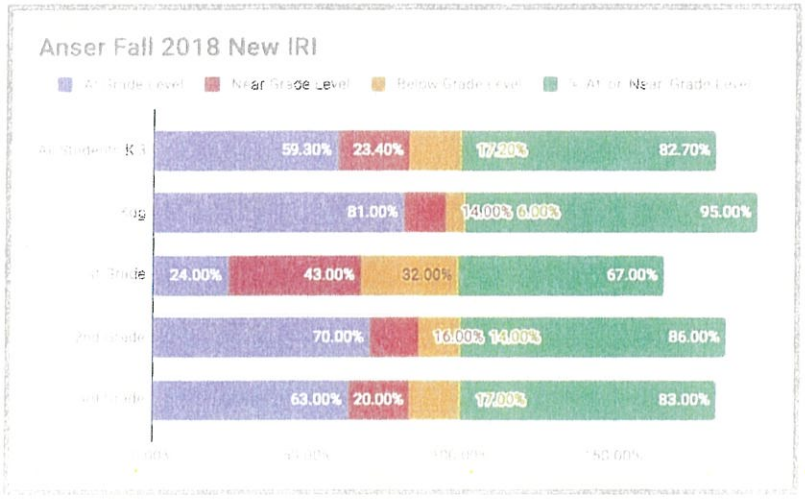
3rd Grade - Fall IRI	At Grade Level	Near Grade Level	Below Grade Level
Overall	63%	20%	17%
Comprehension	74%	9%	17%
Vocabulary	69%	17%	14%
Spelling	57%	20%	23%
Text Fluency*	66%	14%	20%

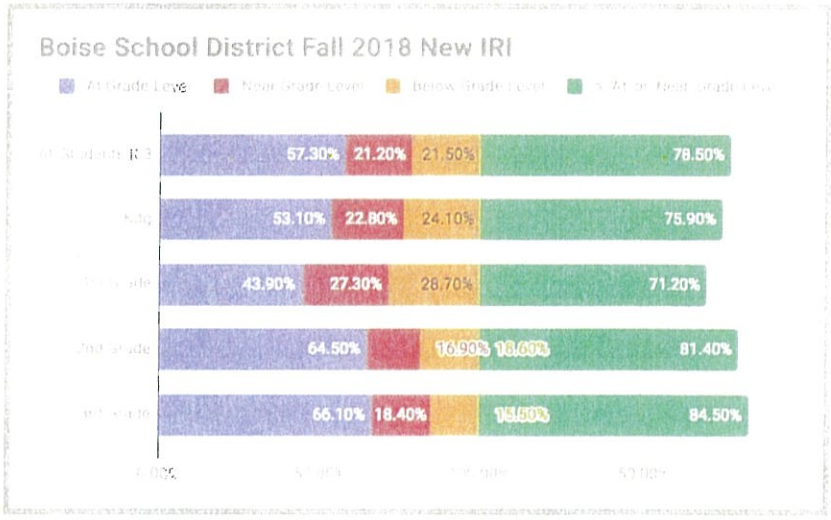
* Text Fluency - Text Fluency is not factored into the Overall score because it is based on grade-level text and therefore is not adaptive (like the rest of the ISIP).

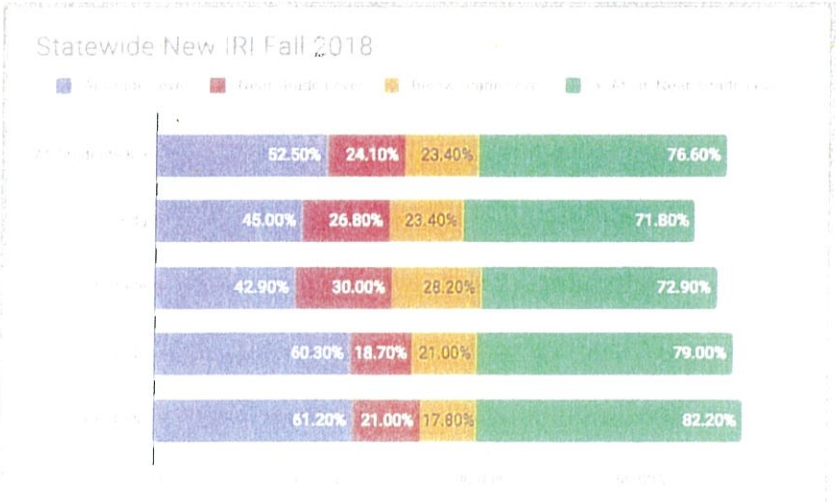
Idaho Standards Achievement Test ALL GRADES (K-3)

ALL GRADE LEVEL COMPARATIVE ANALYSIS:

This group represents students enrolled in K-3, Fall 2018. This group is compared to K-3 students enrolled in the Boise School District and the state.







Anser Charter School

STUDENT ACHIEVEMENT

Presented to Anser Community Board

September, 2017

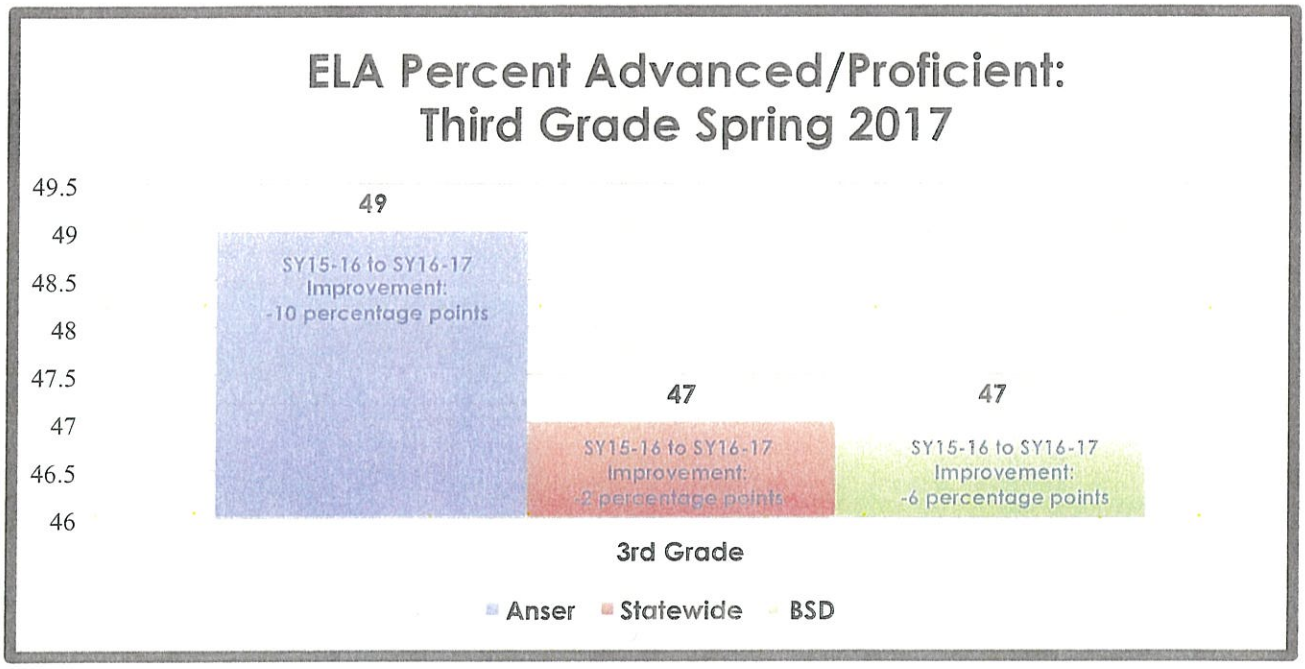
by

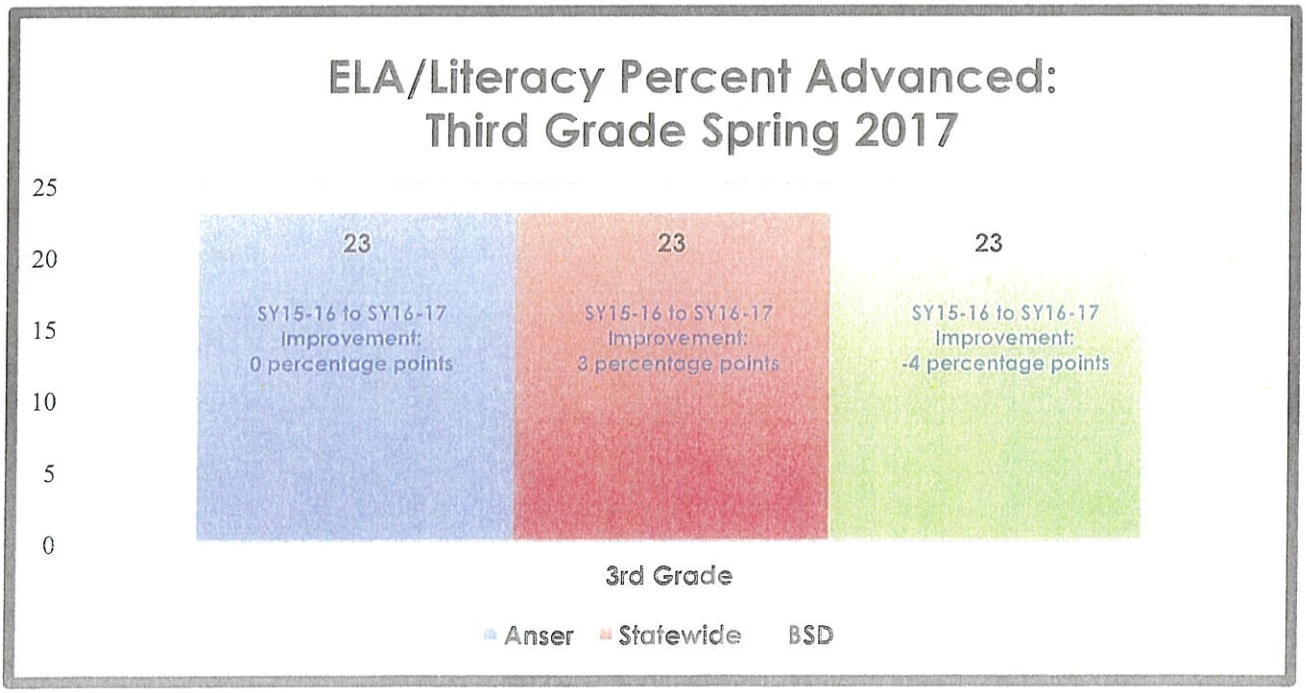
Michelle Dunstan
Anser Education Director

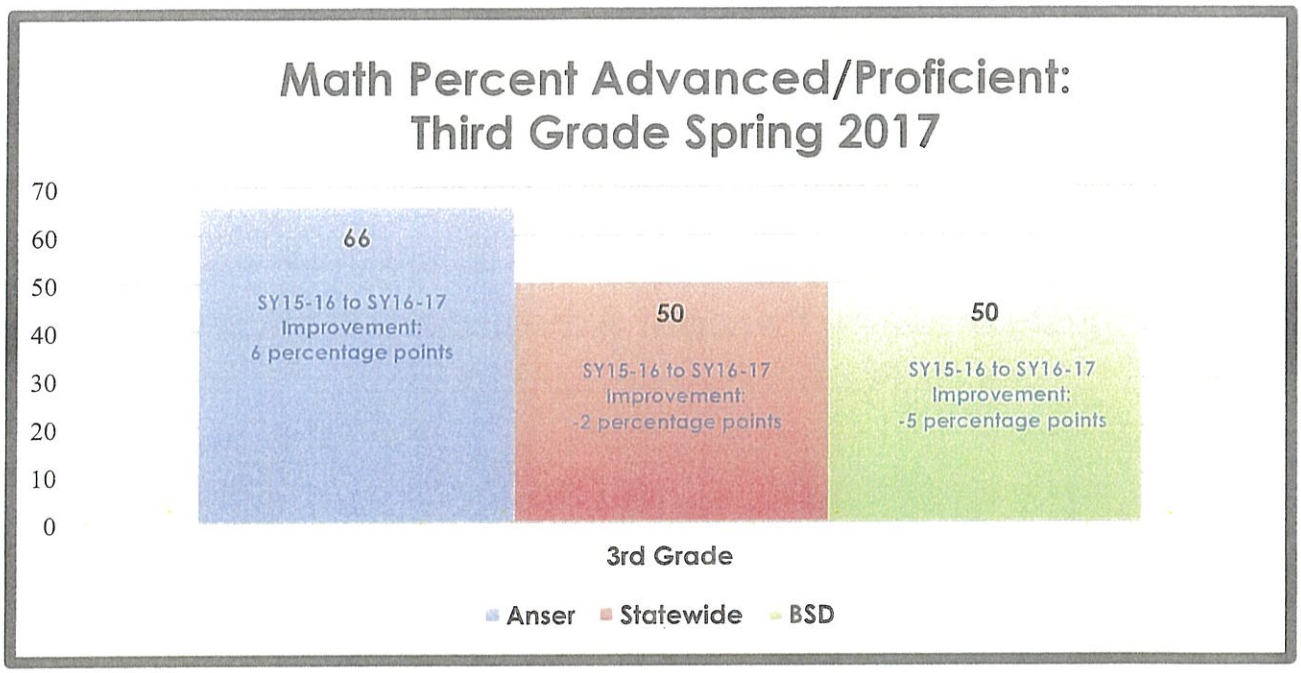
CLASS WIDE COMPARATIVE ANALYSIS:

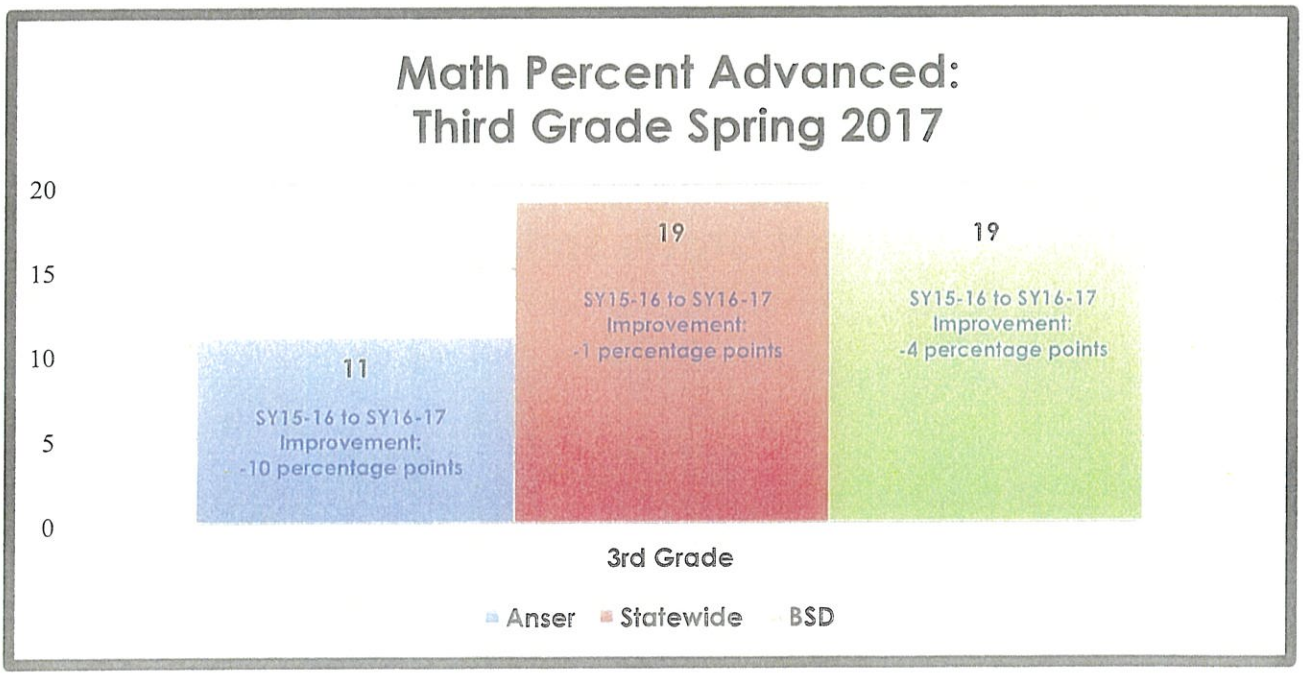
This group represents students enrolled in third grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2016-2017: Grade 3	
Anser	8.6% (504 Plans = 8.6%)
BSD	






Math Percent Advanced/Proficient:
Third Grade Spring 2017
70
60
50
40
30
20
10
0
66
SY15-16 to SY16-17
Improvement:
6 percentage points
50
SY15-16 to SY16-17
Improvement:
-2 percentage points
50
SY15-16 to SY16-17
Improvement:
-5 percentage points
3rd Grade
Anser
Statewide
BSD

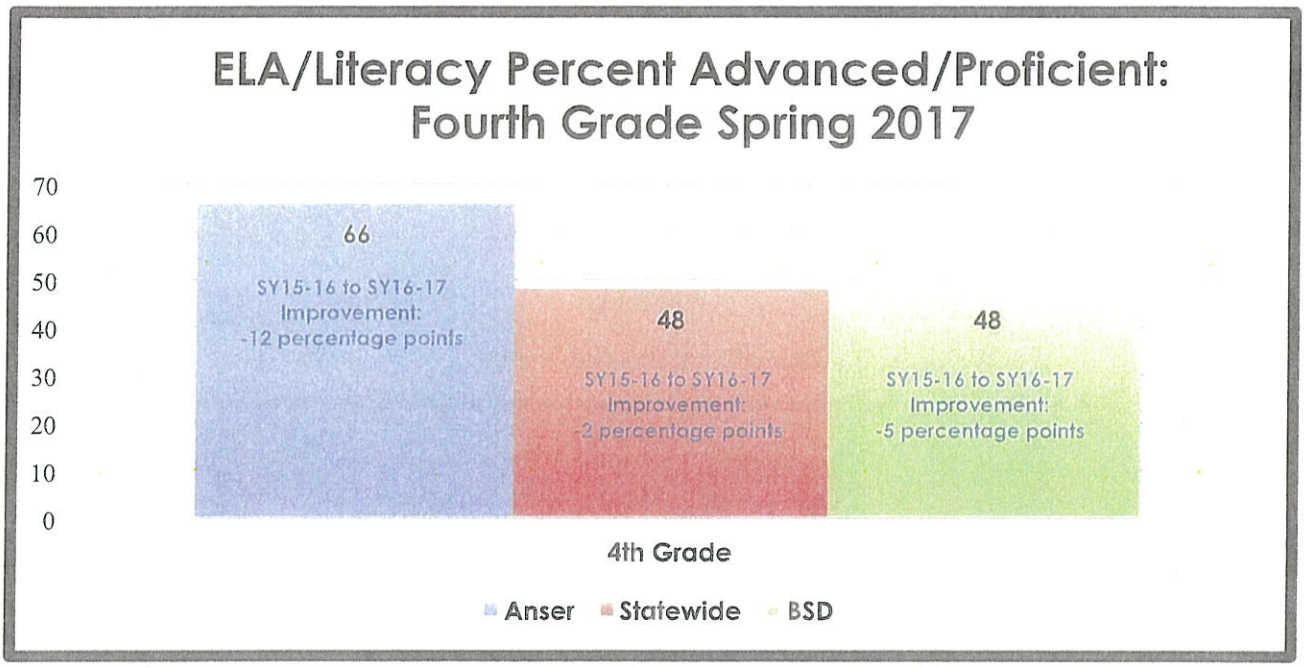

Math Percent Advanced:
Third Grade Spring 2017
20
15
10
5
0
11
SY15-16 to SY16-17
Improvement:
-10 percentage points
19
SY15-16 to SY16-17
Improvement:
-1 percentage points
19
SY15-16 to SY16-17
Improvement:
-4 percentage points
3rd Grade
Anser
Statewide
BSD

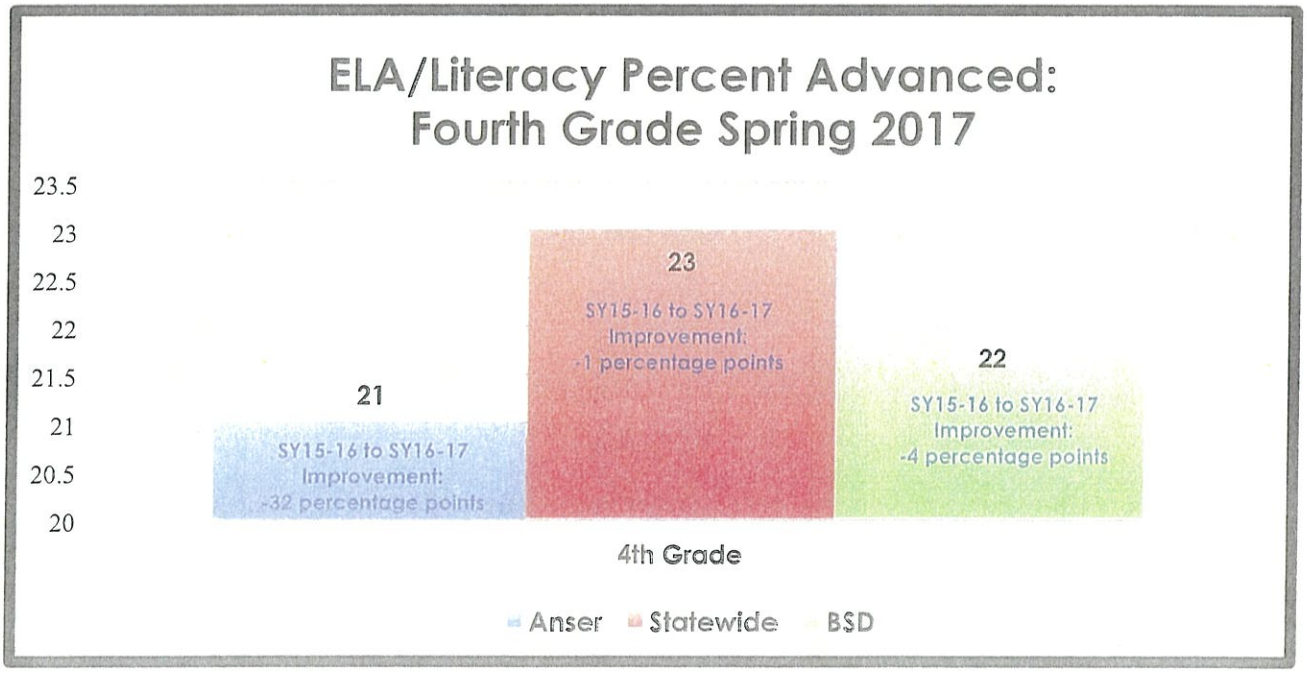
Idaho Standards Achievement Test: Grade Four

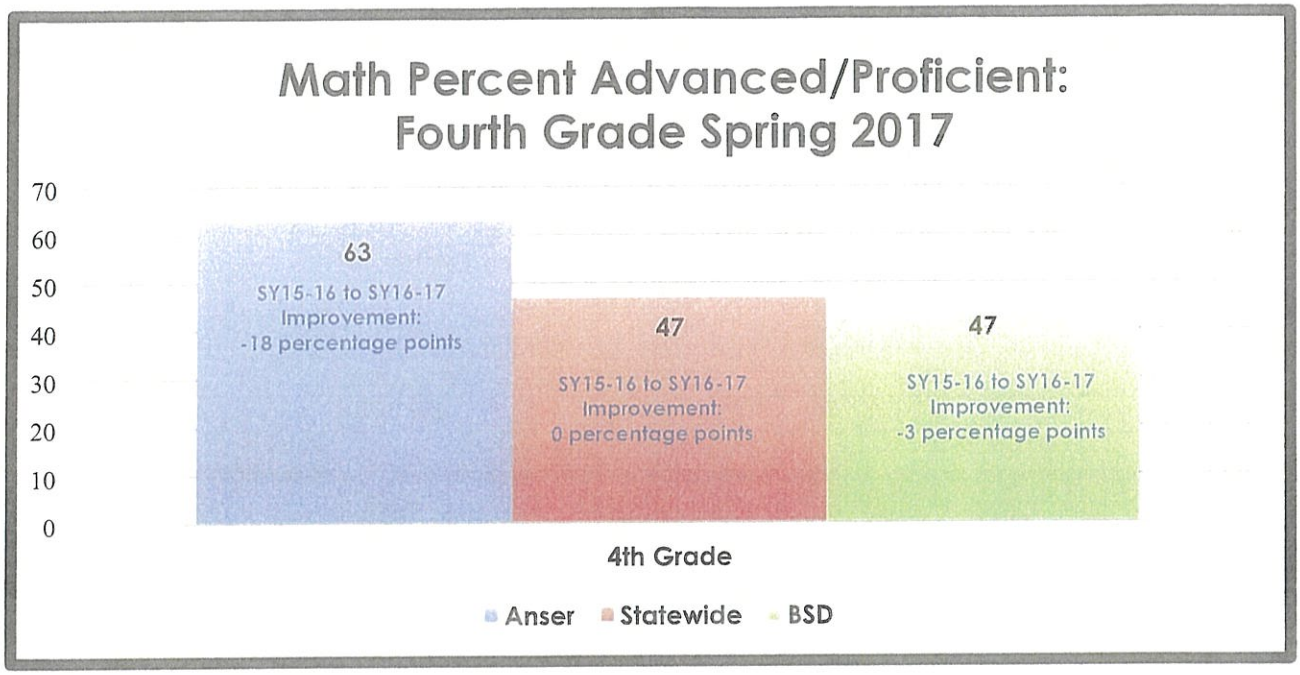
CLASS WIDE COMPARATIVE ANALYSIS:

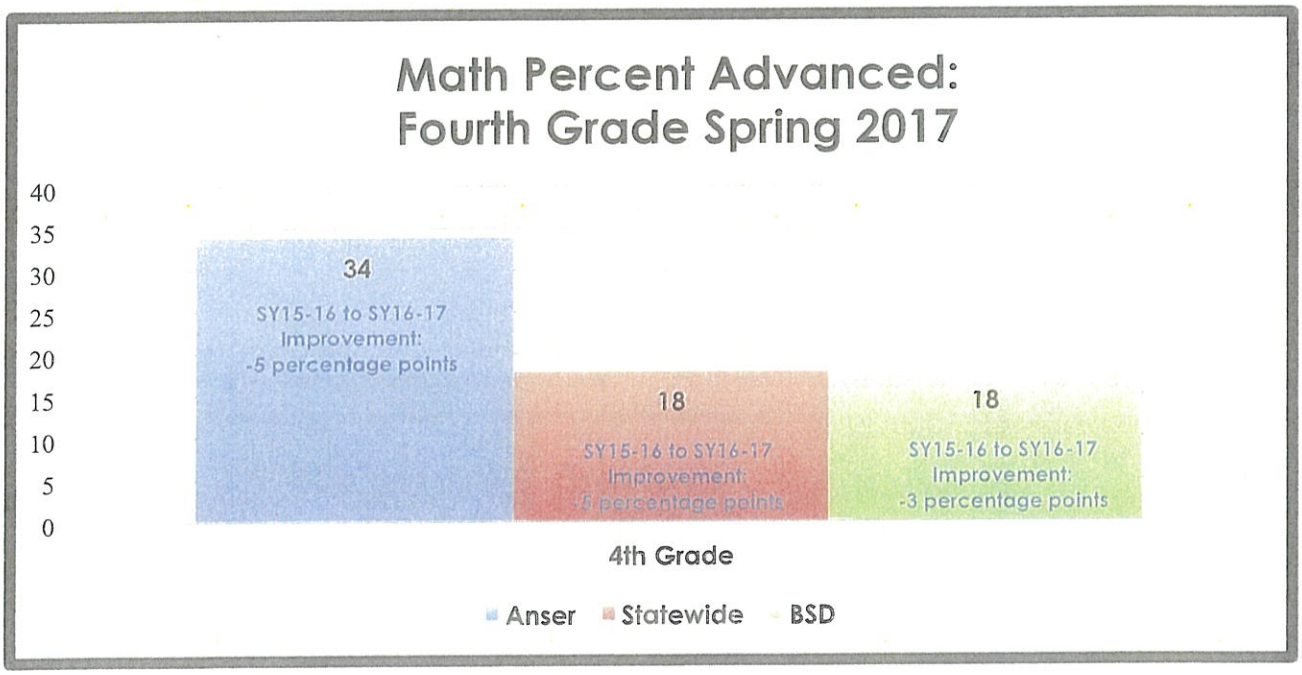
This group represents students enrolled in fourth grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2016-2017: Grade 4	
Anser	13.2% (504 Plans = 7.89%)
BSD	





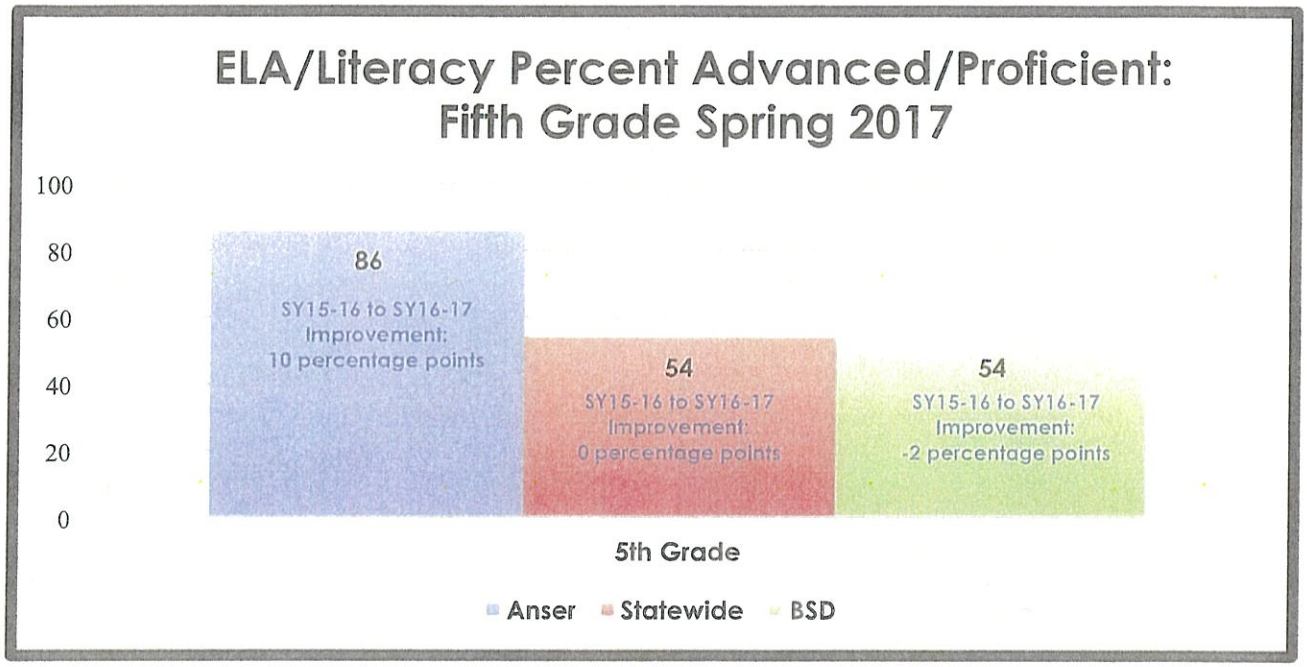

Math Percent Advanced/Proficient:
Fourth Grade Spring 2017
70
60
50
40
30
20
10
0
63
SY15-16 to SY16-17
Improvement:
-18 percentage points
47
SY15-16 to SY16-17
Improvement:
0 percentage points
47
SY15-16 to SY16-17
Improvement:
-3 percentage points
4th Grade
Anser
Statewide
BSD

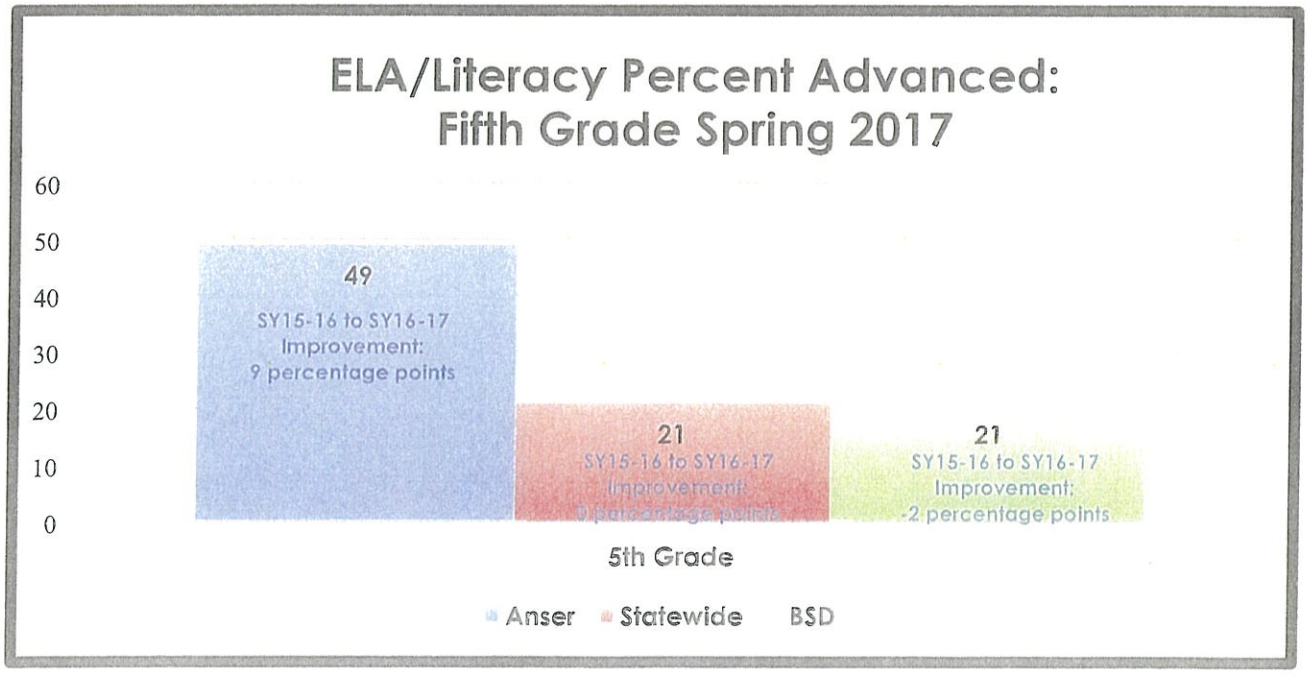

Math Percent Advanced:
Fourth Grade Spring 2017
40
35
30
25
20
15
10
5
0
34
SY15-16 to SY16-17
Improvement:
-5 percentage points
18
SY15-16 to SY16-17
Improvement:
-5 percentage points
18
SY15-16 to SY16-17
Improvement:
-3 percentage points
4th Grade
Anser
Statewide
BSD

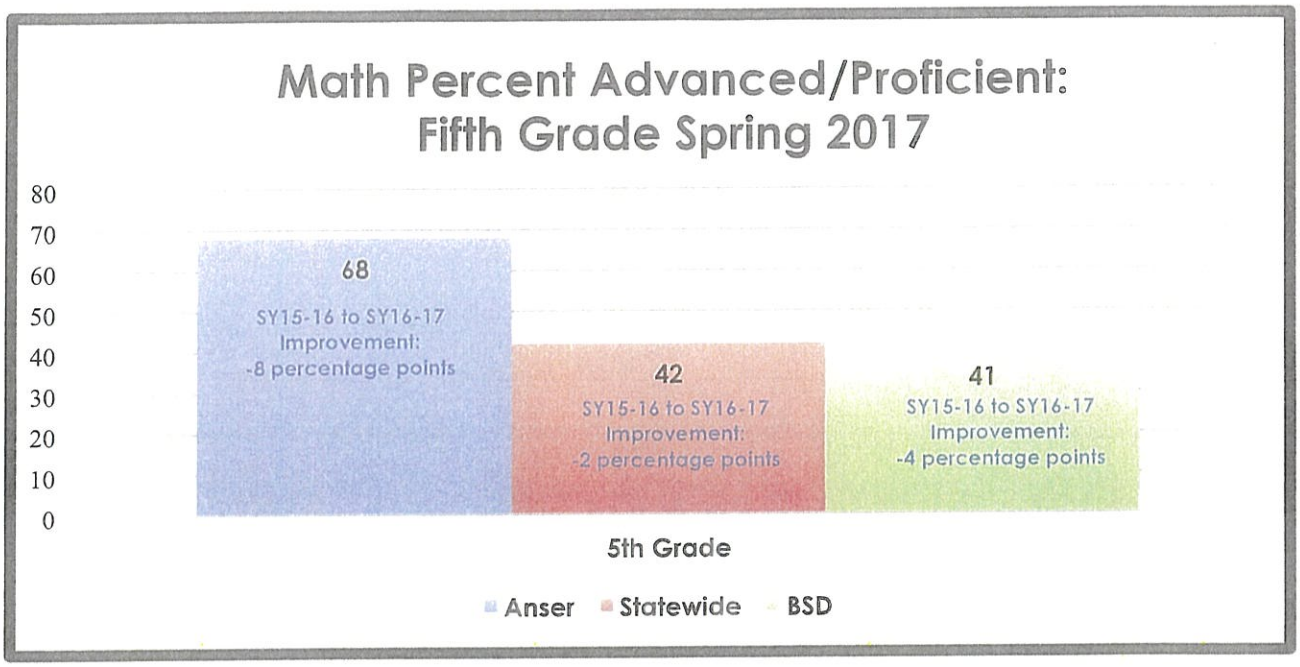
CLASS WIDE COMPARATIVE ANALYSIS:

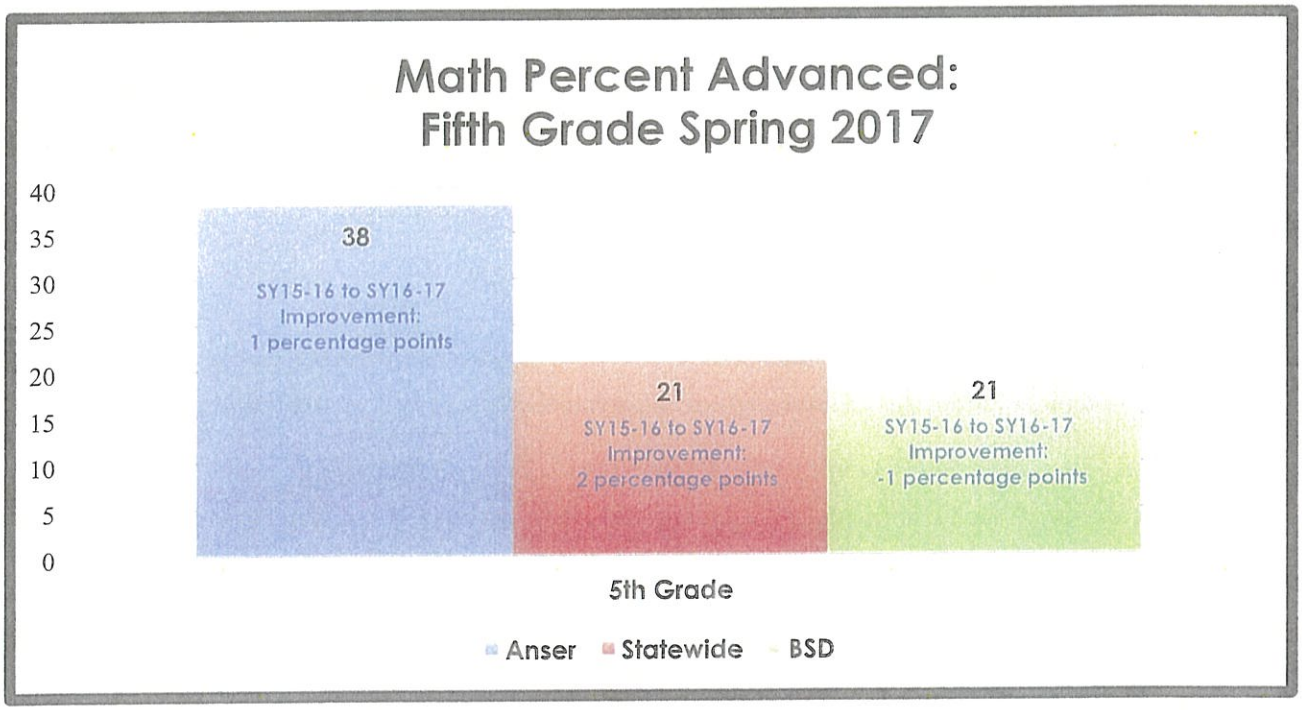
This group represents students enrolled in fifth grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2016-2017: Grade 5	
Anser	10.81% (504 Plans = 5.4%)
BSD	





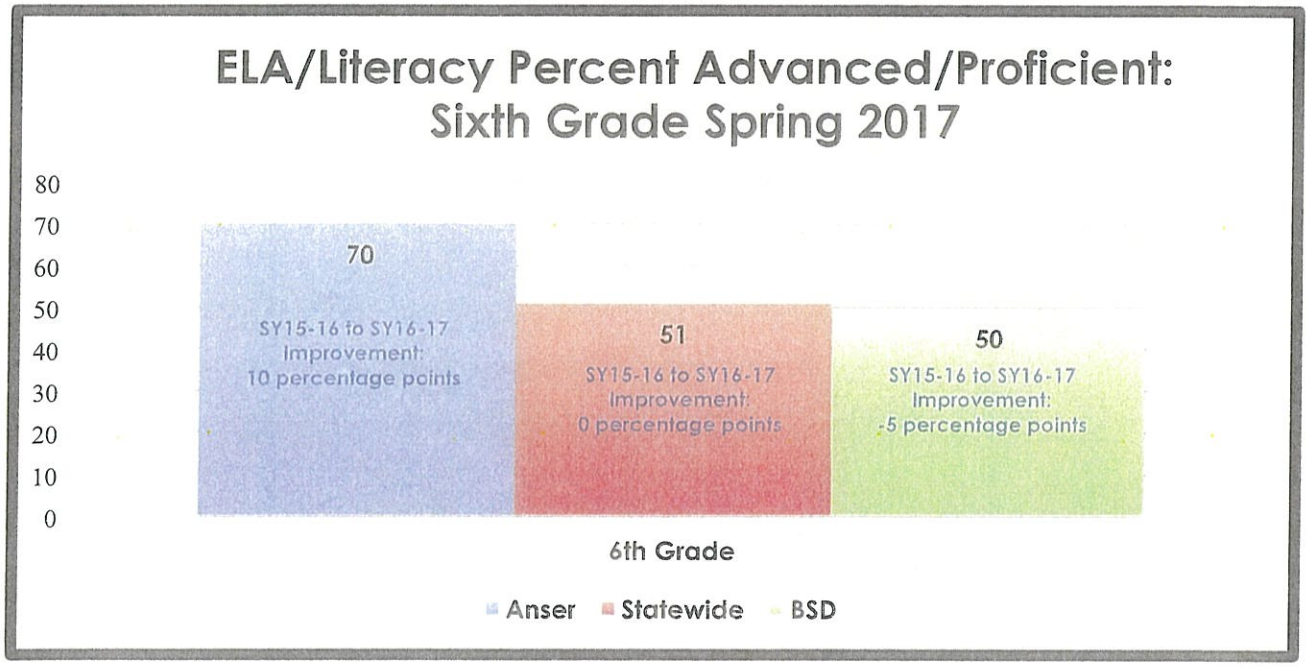

Math Percent Advanced/Proficient:
Fifth Grade Spring 2017
80
70
60
50
40
30
20
10
0
68
SY15-16 to SY16-17
Improvement:
-8 percentage points
42
SY15-16 to SY16-17
Improvement:
-2 percentage points
41
SY15-16 to SY16-17
Improvement:
-4 percentage points
5th Grade
Anser
Statewide
BSD

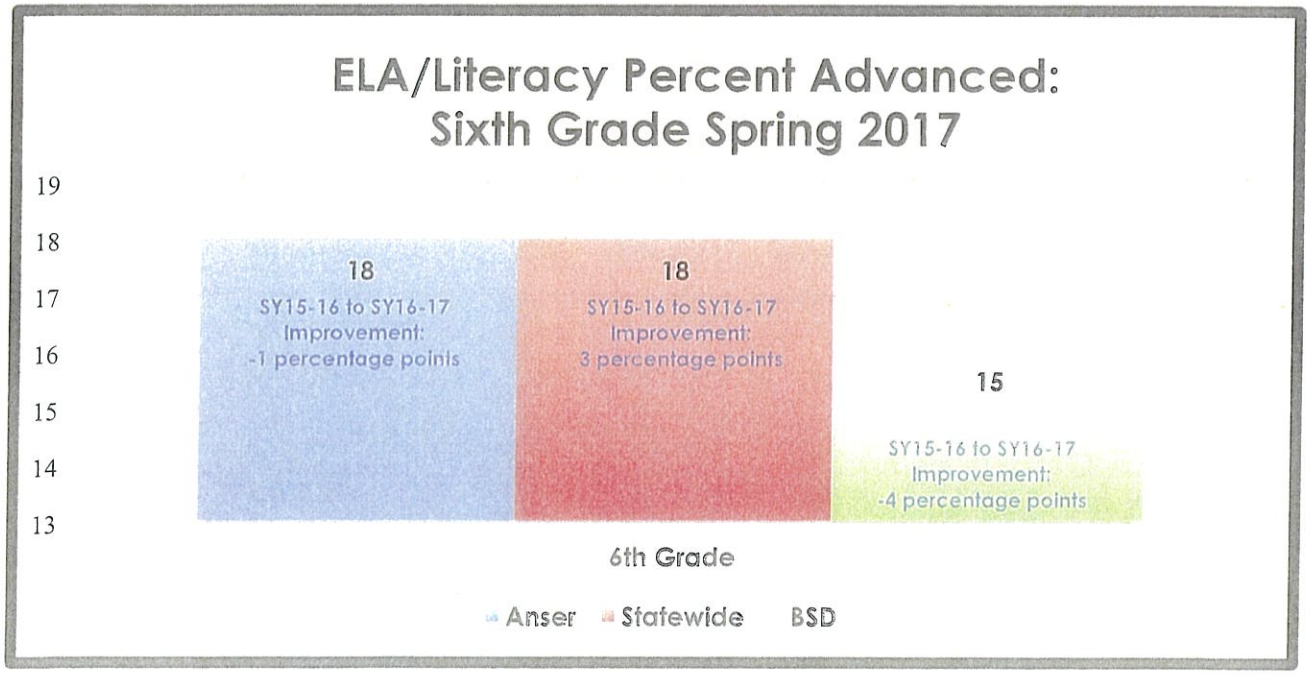

Math Percent Advanced:
Fifth Grade Spring 2017
40
35
30
25
20
15
10
5
0
38
SY15-16 to SY16-17
Improvement:
1 percentage points
21
SY15-16 to SY16-17
Improvement:
2 percentage points
21
SY15-16 to SY16-17
Improvement:
-1 percentage points
5th Grade
Anser
Statewide
BSD

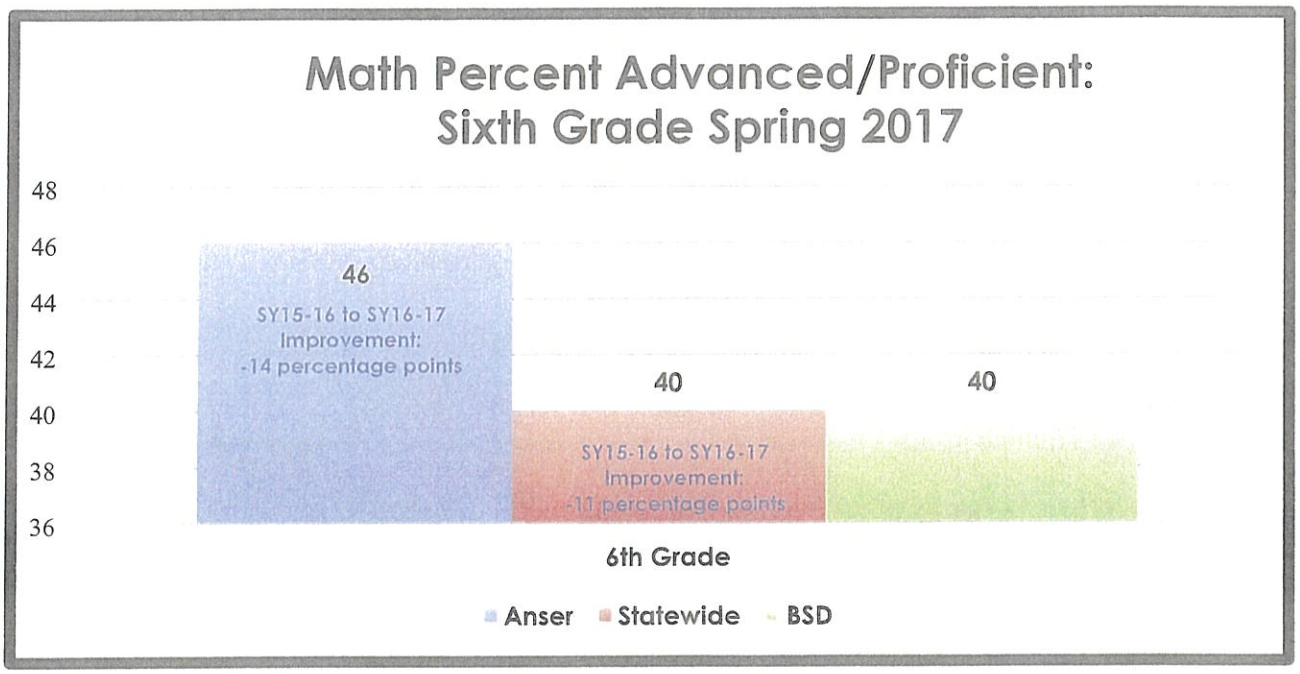
CLASS WIDE COMPARATIVE ANALYSIS:

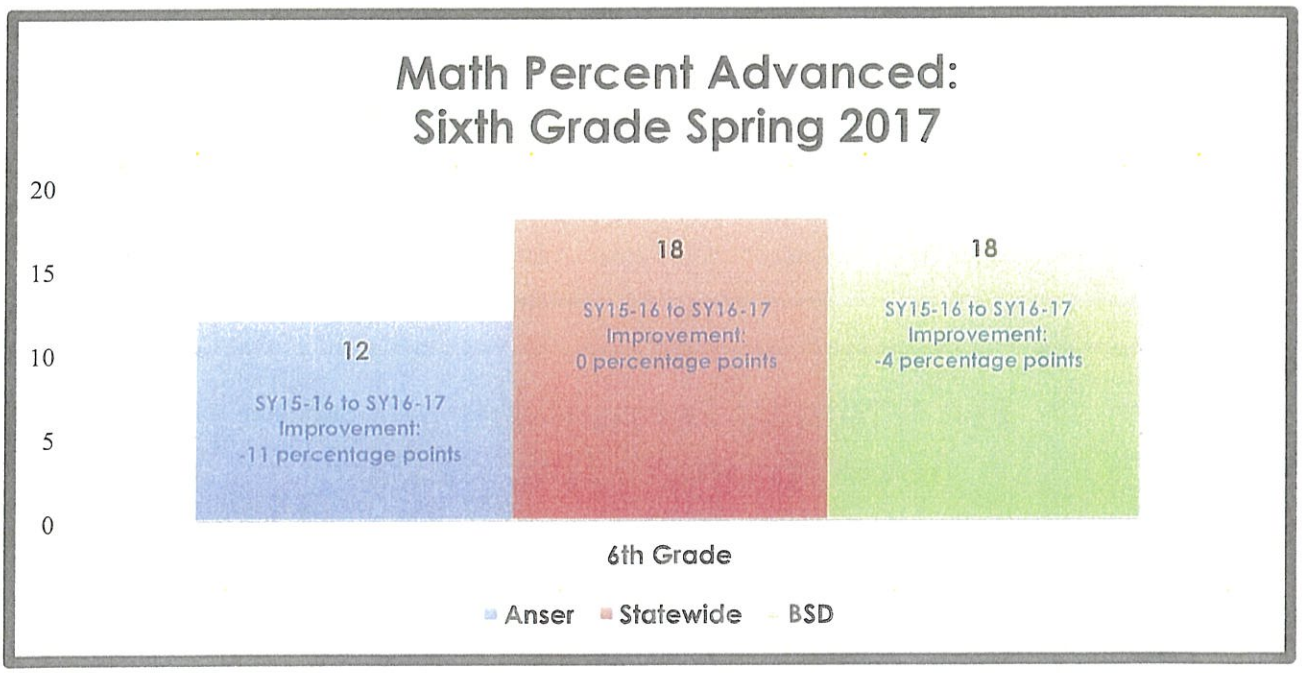
This group represents students enrolled in sixth grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2016-2017: Grade 6	
Anser	12% (504 Plans = %)
BSD 2	





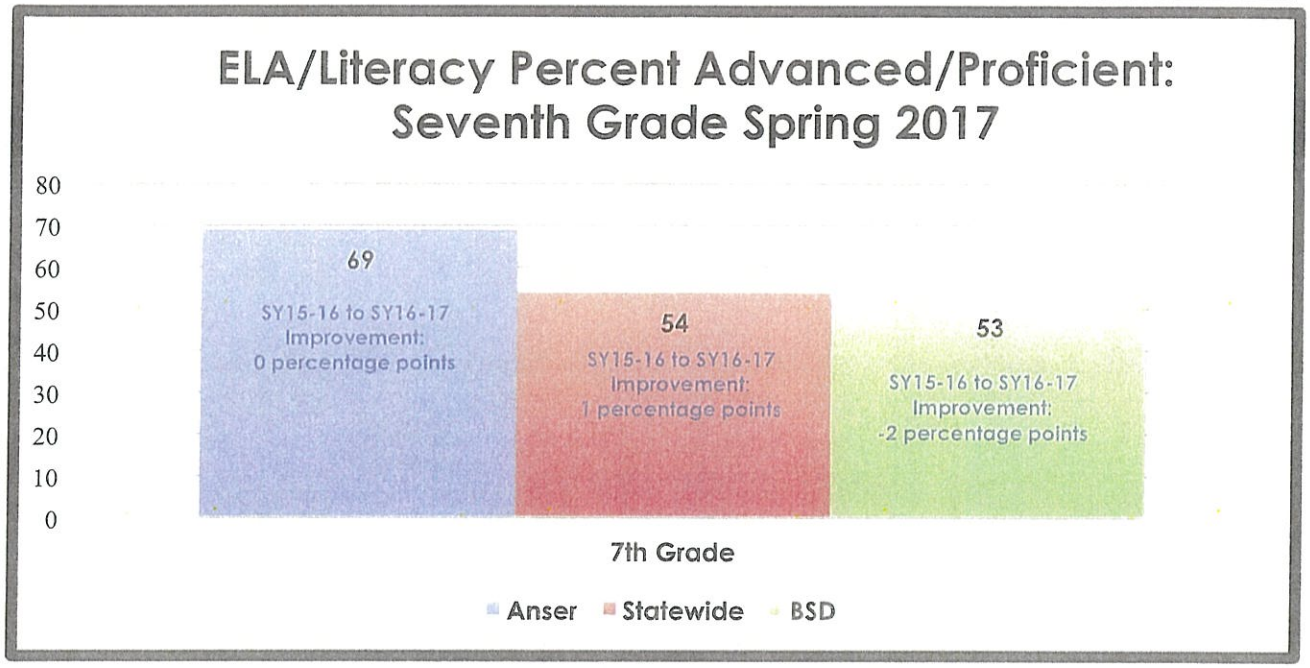

Math Percent Advanced/Proficient:
Sixth Grade Spring 2017
48
46
44
42
40
38
36
46
SY15-16 to SY16-17
Improvement:
-14 percentage points
40
SY15-16 to SY16-17
Improvement:
-11 percentage points
40
6th Grade
Anser
Statewide
BSD

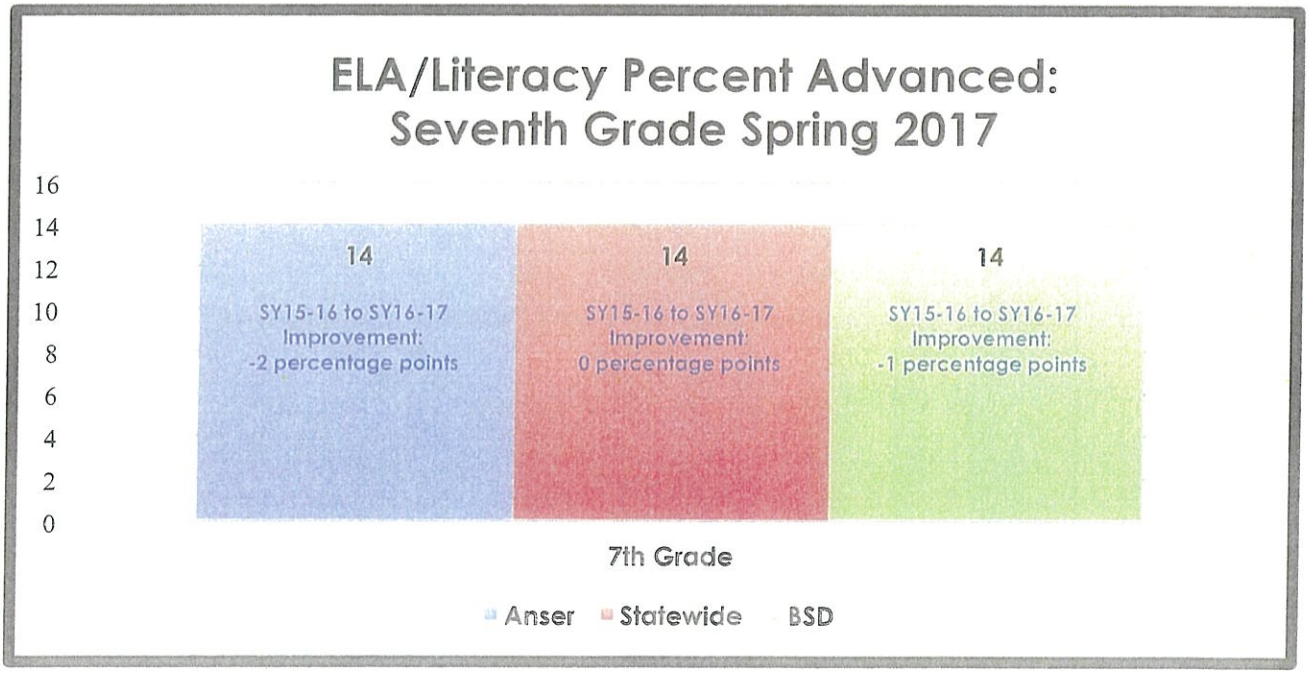

Math Percent Advanced:
Sixth Grade Spring 2017
20
15
10
5
0
12
SY15-16 to SY16-17
Improvement:
-11 percentage points
18
SY15-16 to SY16-17
Improvement:
0 percentage points
18
SY15-16 to SY16-17
Improvement:
-4 percentage points
6th Grade
Anser
Statewide
BSD

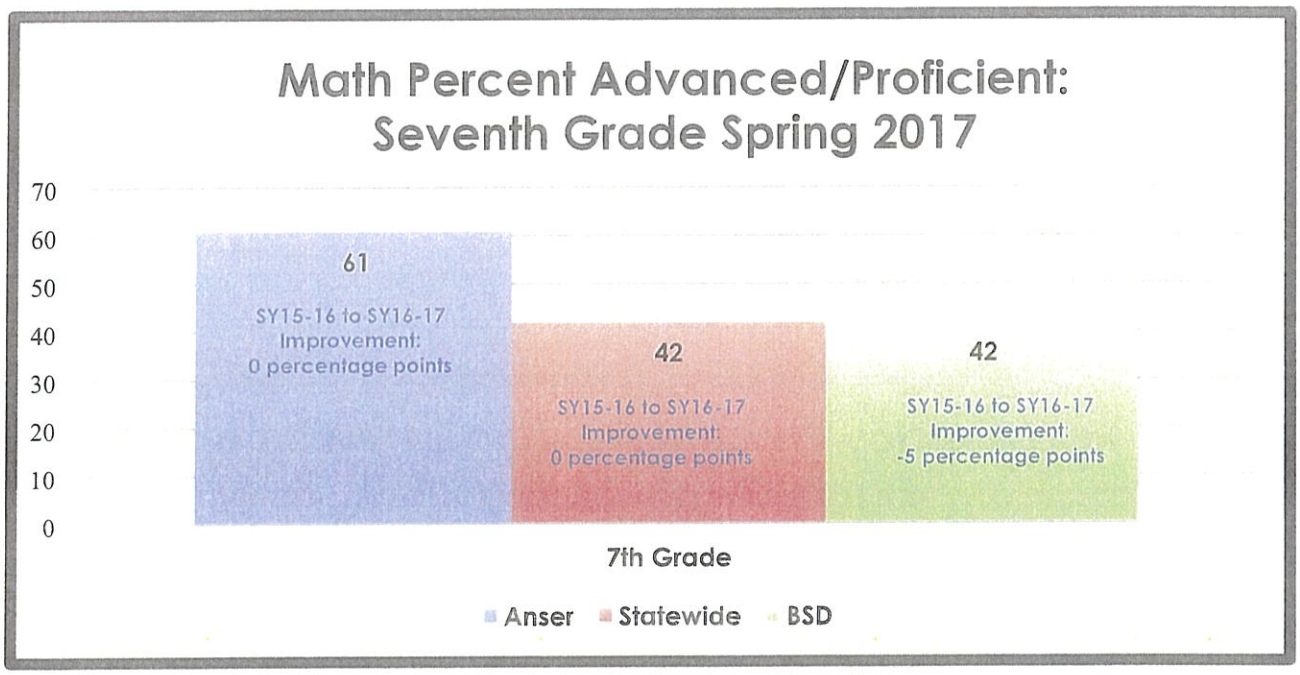
CLASS WIDE COMPARATIVE ANALYSIS:

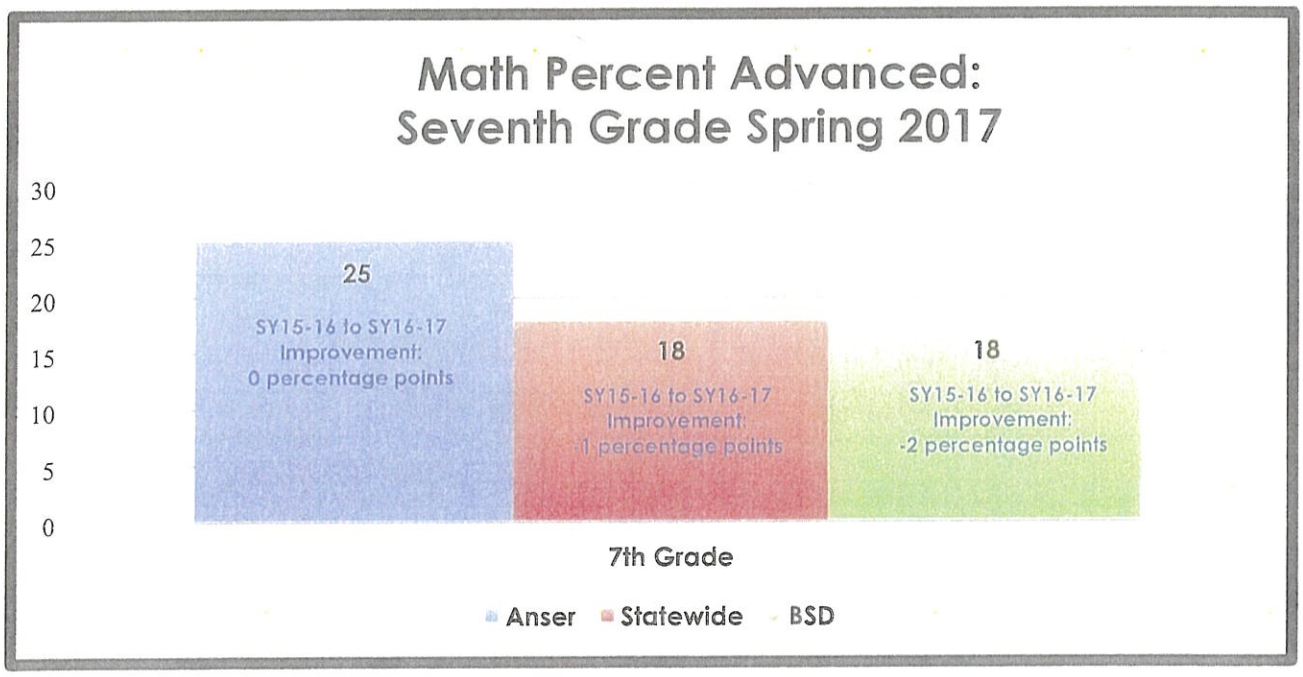
This group represents students enrolled in seventh grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2016-2017: Grade 7	
Anser	8.3% (504 Plans = 10.41%)
BSD	





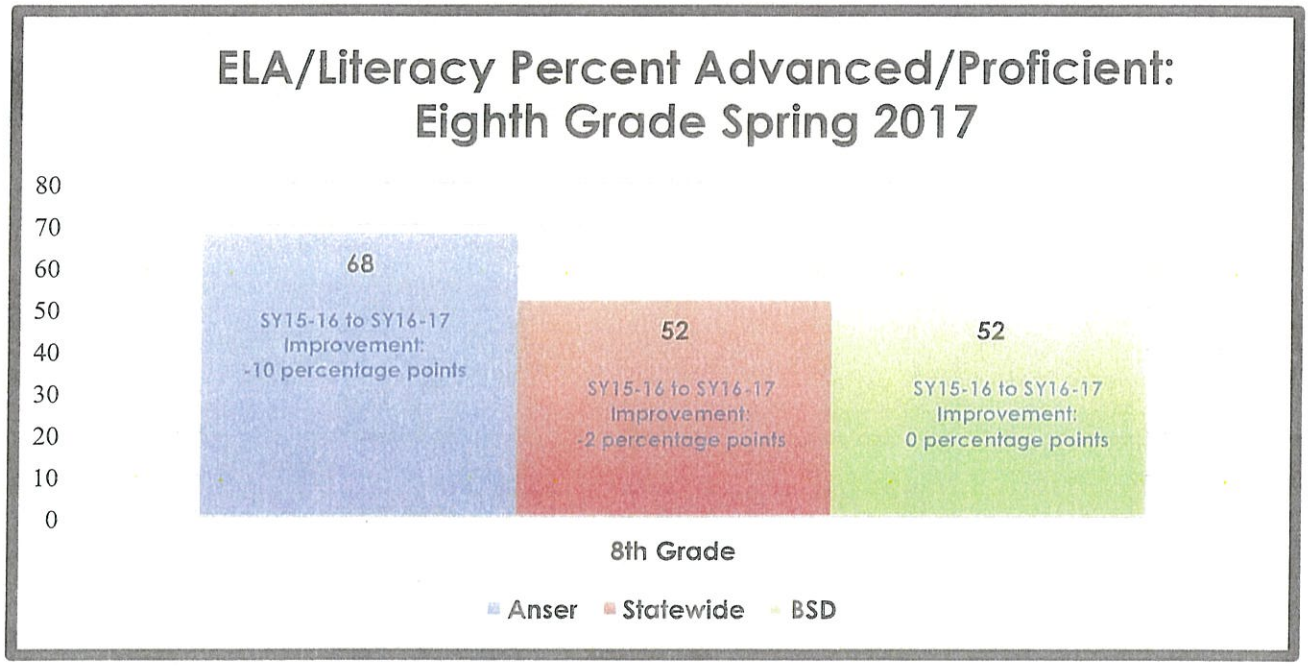

Math Percent Advanced/Proficient:
Seventh Grade Spring 2017
70
60
50
40
30
20
10
0
61
SY15-16 to SY16-17
Improvement:
0 percentage points
42
SY15-16 to SY16-17
Improvement:
0 percentage points
42
SY15-16 to SY16-17
Improvement:
-5 percentage points
7th Grade
Anser
Statewide
BSD

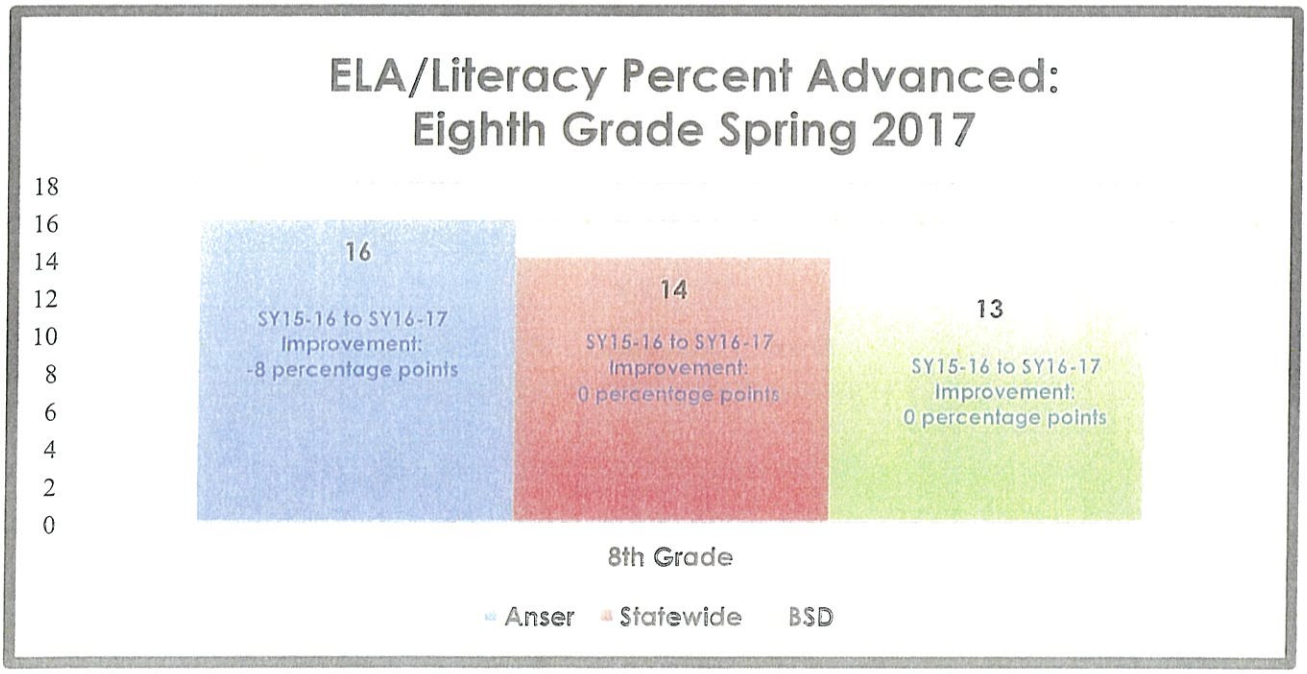

Math Percent Advanced:
Seventh Grade Spring 2017
30
25
20
15
10
5
0
25
SY15-16 to SY16-17
Improvement:
0 percentage points
18
SY15-16 to SY16-17
Improvement:
-1 percentage points
18
SY15-16 to SY16-17
Improvement:
-2 percentage points
7th Grade
Anser
Statewide
BSD

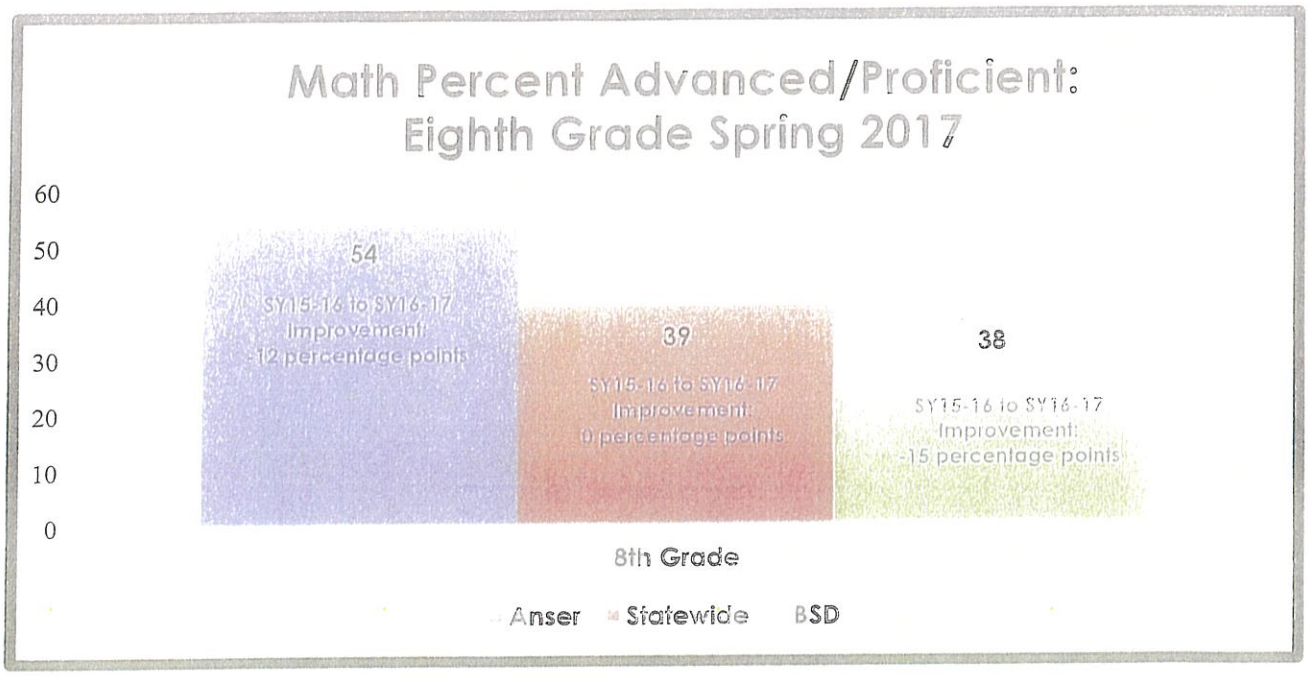
CLASS WIDE COMPARATIVE ANALYSIS:

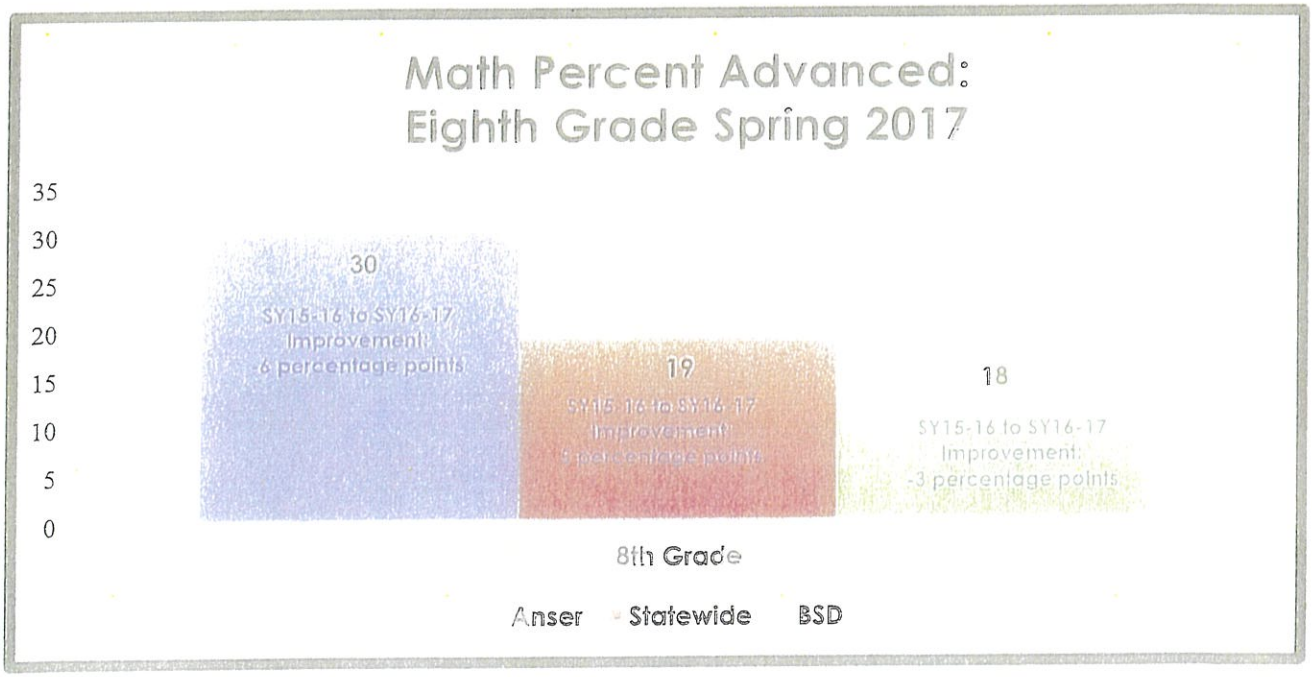
This group represents students enrolled in eighth grade, Spring 2017. This group is compared to third grade students enrolled the Boise School District and the State of Idaho.

Percentage of Students Identified Special Education 2015-2016: Grade 8	
Anser	26.5 (504 Plans = 16.32%)
BSD	






Math Percent Advanced/Proficient:
Eighth Grade Spring 2017
60
50
40
30
20
10
0
54
SY15-16 to SY16-17
Improvement:
12 percentage points
39
SY15-16 to SY16-17
Improvement:
0 percentage points
38
SY15-16 to SY16-17
Improvement:
-15 percentage points
8th Grade
Anser
Statewide
BSD


Math Percent Advanced:
Eighth Grade Spring 2017
35
30
25
20
15
10
5
0
30
SY15-16 to SY16-17
Improvement:
6 percentage points
19
SY15-16 to SY16-17
Improvement:
3 percentage points
18
SY15-16 to SY16-17
Improvement:
-3 percentage points
8th Grade
Anser
Statewide
BSD

Percentage of Students Meeting Standards with Proficiency			
	Math	ELA	Science
Anser	53%	66%	72%
Boise School District	47.4%	58%	59.4%
Roosevelt	75%	77%	89%
State	55.6%	55.6%	59.6

Anser-BSD Comparison Data 2019 ISATs

% Hispanic Students meeting Standards with Proficiency		
	Math	**ELA**
Anser Hispanic Students	56.6%	72.5%
District Hispanic Students	26.7%	33.6%
State Hispanic Students	24.4%	35.5%

Anser-BSD Comparison Data 2018 ISATs

Appendix F5
EL Core Practices

Education

Core Practices

A Vision for Improving Schools

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EL Education
247 West 35th St., 8th Floor
New York, NY 10001
212-239-4455

Design by Mike Kelly

Special thanks to the students of ANSER Charter School, Genesee Community Charter School, Palouse Prairie Charter School, Santa Fe School for the Arts & Sciences, and Venture Academy, whose art work is featured throughout this book.

To view these and other examples of high-quality student work, please visit modelsofexcellence.ELeducation.org.

A Different Approach to Teaching and Learning

EL Education creates classrooms where ...

Learning is challenging.
Students are supported to do far more than they think they can. Teachers expect excellence and teach in ways that enable students to learn deeply, surpass standards, and produce high-quality work. Students and teachers model academic courage.

Learning is active.
Students are scientists, urban planners, historians, artists, and activists, exploring ideas and engaging in authentic work that allows them to contribute to their communities and promote equity and social justice.

Learning is meaningful.
Students build deep understanding of concepts and can apply their skills and knowledge to new contexts and real-world issues. They are learning with a purpose—getting smart to do good—and see that their education is in service of building a better world.

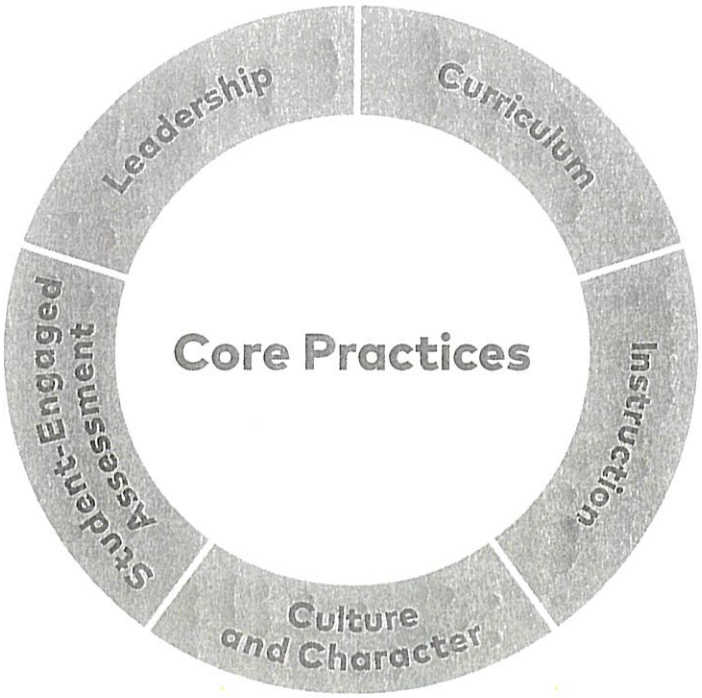
Learning is collaborative.
School leaders, teachers, students, and families work together to create a culture of respect, responsibility, and joy in learning. The school community is a place where all students and adults feel that they belong, support each other to succeed, and are inspired to be their best selves.

Learning is public.
Students produce high-quality work for presentation to audiences within and beyond the school. They reflect on what and how they learn with peers, teachers, and community members. Hallways and classrooms are filled with evidence of learning and beautiful student work.

EL Education Core Practices

Our Core Practices address five key domains of life in school.

Curriculum	EL Education's approach to curriculum promotes both challenge and joy in learning. We encourage educators to use, adapt, or design curricula that allow all students to grapple with demanding, standards-based content and meaningful tasks and produce high-quality work. We believe curricula should elevate student collaboration, voice, thinking, and reflection; should reflect a commitment to developing character; and should empower students to contribute to a more just and equitable world.
Instruction	EL Education promotes instruction that is alive with discovery, inquiry, critical thinking, problem solving, and collaboration. Teachers talk less. Students talk and think more. Lessons challenge, engage, and empower students with complex issues, text, and problems. They lift up big disciplinary ideas and give students practice with the tools and skills professionals use in the real world as they create high-quality work. Teachers differentiate instruction and empower all students to be self-directed, independent learners.
Culture and Character	The EL Education model fosters and celebrates students' character development by building a culture in which students and staff work together to become effective learners and ethical people who contribute to a better world. Schools establish Habits of Character—qualities like respect, responsibility, courage, and kindness—and model and discuss them every day. The school is suffused by a spirit of crew: students and staff work together as a team to sustain a learning community where everyone belongs and can succeed.
Student-Engaged Assessment	EL Education believes that assessment practices should motivate students to become leaders of their own learning. Students track their progress toward standards-based learning targets, set goals, and reflect on growth and challenges. Students and teachers regularly analyze quantitative and qualitative data that include assessments, reflections, and student work and use those data to inform goals and instruction. Students regularly present evidence of their achievement and growth through student-led family conferences, passage presentations, and celebrations of learning.
Leadership	EL Education supports school leaders to build a cohesive school vision focused on EL Education's Dimensions of Student Achievement, continuous improvement, and shared leadership. Leaders align resources and activities to the school's vision and lead a professional culture with a growth mindset. Leaders shape school structures to provide equitable education to all students, celebrate joy in learning, and build a schoolwide learning community of trust and collaboration. Leaders work collaboratively with families, staff, and students to make evidence-based decisions that enable all students to achieve.



How to Use This Book

This book addresses the five domains of schooling that shape student achievement: **Curriculum**, **Instruction**, **Culture and Character**, **Student-Engaged Assessment**, and **Leadership**. Some educators refer to it as "the EL Bible." Along with our ten Design Principles and our Dimensions of Student Achievement framework (on the following pages), the Core Practices outline EL Education's model of education. They are a vision for improving schools.

This book represents 25 years of collaboration with our school partners to describe an ideal school environment. It has been revised twice over this time, based on our organizational learning and the practical wisdom of our schools. The structures and practices documented in this book are not simply aspirational: they are descriptions of the most effective practices in our schools pulled together in one book.

Within each domain, we have defined a set of Core Practices. The domains and Core Practices are not actually discrete—in the real life of any school, they overlap and are implemented simultaneously. Nor are the domains and practices prioritized sequentially. This book can be used in a targeted way, focused only on specific practices, or it can be used comprehensively to guide a full expression of the EL Education model.

This book does not belong on a shelf. It belongs on your desk, marked up with ideas, questions, and inspirations. Copy pages and post them. Read excerpts aloud in meetings. Customize the structures here to fit your classroom and school. Use them to create school-specific tools for observation, reflection, and learning.

EL Education Design Principles

1. The Primacy of Self-Discovery

Learning happens best with emotion, challenge, and the requisite support. People discover their abilities, values, passions, and responsibilities in situations that offer adventure and the unexpected. In EL Education schools, students undertake tasks that require perseverance, fitness, craftsmanship, imagination, self-discipline, and significant achievement. A teacher's primary task is to help students overcome their fears and discover they can do more than they think they can.

2. The Having of Wonderful Ideas

Teaching in EL Education schools fosters curiosity about the world by creating learning situations that provide something important to think about, time to experiment, and time to make sense of what is observed.

3. The Responsibility for Learning

Learning is both a personal process of discovery and a social activity. Everyone learns both individually and as part of a group. Every aspect of an EL Education school encourages both children and adults to become increasingly responsible for directing their own personal and collective learning.

4. Empathy and Caring

Learning is fostered best in communities where students' and teachers' ideas are respected and where there is mutual trust. Learning groups are small in EL Education schools, with a caring adult looking after the progress and acting as an advocate for each child. Older students mentor younger ones, and students feel physically and emotionally safe.

5. Success and Failure

All students need to be successful if they are to build the confidence and capacity to take risks and meet increasingly difficult challenges. But it is also important for students to learn from their failures, to persevere when things are hard, and to learn to turn disabilities into opportunities.

6. Collaboration and Competition

Individual development and group development are integrated so that the value of friendship, trust, and group action is clear. Students are encouraged to compete, not against each other, but with their own personal best and with rigorous standards of excellence.

7. Diversity and Inclusion

Both diversity and inclusion increase the richness of ideas, creative power, problem-solving ability, and respect for others. In EL Education schools, students investigate and value their different histories and talents as well as those of other communities and cultures. Schools and learning groups are heterogeneous.

8. The Natural World

A direct and respectful relationship with the natural world refreshes the human spirit and teaches the important ideas of recurring cycles and cause and effect. Students learn to become stewards of the earth and of future generations.

9. Solitude and Reflection

Students and teachers need time alone to explore their own thoughts, make their own connections, and create their own ideas. They also need to exchange their reflections with other students and with adults.

10. Service and Compassion

We are crew, not passengers. Students and teachers are strengthened by acts of consequential service to others, and one of an EL Education school's primary functions is to prepare students with the attitudes and skills to learn from and be of service.

EL Education Dimensions of Student Achievement

Our definition of student achievement combines academic achievement, character, and high-quality work. We believe that academic success is built on strong character qualities of collaboration, perseverance, responsibility, and compassion, and that character is shaped through engaging and challenging academic work.

Dimension of Achievement	Students	Teachers and Leaders
Mastery of Knowledge and Skills	• Demonstrate proficiency and deeper understanding: show mastery in a body of knowledge and skills within each discipline • Apply their learning: transfer knowledge and skills to novel, meaningful tasks • Think critically: analyze, evaluate, and synthesize complex ideas and consider multiple perspectives • Communicate clearly: write, speak, and present ideas effectively in a variety of media within and across disciplines	• Ensure that curriculum, instruction, and assessments are rigorous, meaningful, and aligned with standards • Use assessment practices that position students as leaders of their own learning • Use meaningful data for both teachers and students to track progress toward learning goals • Engage all students in daily lessons that require critical thinking about complex, worthy ideas, texts, and problems
Character	• Work to become effective learners: develop the mindsets and skills for success in college, career, and life (e.g., initiative, responsibility, perseverance, collaboration) • Work to become ethical people: treat others well and stand up for what is right (e.g., empathy, integrity, respect, compassion) • Contribute to a better world: put their learning to use to improve communities (e.g., citizenship, service)	• Elevate student voice and leadership in classrooms and across the school • Make Habits of Scholarship visible across the school and in daily instruction • Model a schoolwide culture of respect and compassion • Prioritize social and emotional learning, along with academic learning, across the school
High-Quality Student Work	• Create complex work: demonstrate higher-order thinking, multiple perspectives, and transfer of understanding • Demonstrate craftsmanship: create work that is accurate and beautiful in conception and execution • Create authentic work: demonstrate original thinking and voice, connect to real-world issues and formats, and, when possible, create work that is meaningful to the community beyond the school	• Design tasks that ask students to apply, analyze, evaluate, and create as part of their work • Use models of excellence, critique, and multiple drafts to support all students to produce work of exceptional quality • Connect students to the world beyond school through meaningful fieldwork, expert collaborators, research, and service learning

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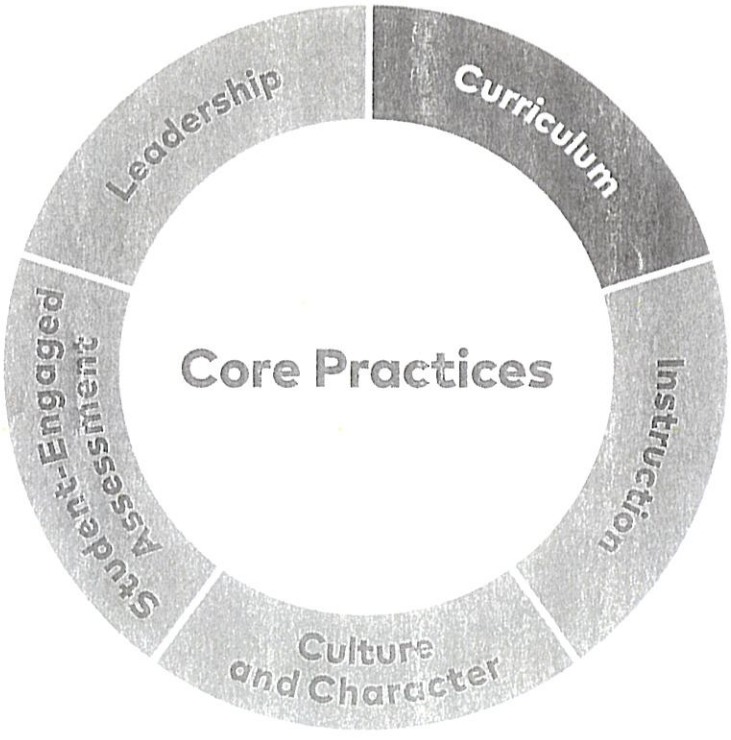
Curriculum

EL Education's approach to curriculum promotes both challenge and joy in learning. We encourage educators to use, adapt, or design curricula that allow all students to grapple with demanding, standards-based content and meaningful tasks and produce high-quality work. We believe curricula should elevate student collaboration, voice, thinking, and reflection; should reflect a commitment to developing character; and should empower students to contribute to a more just and equitable world.

In the Curriculum domain, we provide guidance for schools and teachers who are choosing, adapting, or enhancing a published curriculum and for those who are designing their own.

Core Practices in This Domain

- Choosing, Adapting, and Enhancing Curricula
- Mapping Knowledge, Skills, and Habits of Character
- Supporting College and Career Readiness
- Supporting Global Citizenship
- Supporting Social, Emotional, and Physical Wellness
- Designing Case Studies
- Incorporating Fieldwork, Experts, and Service Learning
- Designing Projects and Products
- Designing Learning Expeditions



Core Practice 1

Choosing, Adapting, and Enhancing Curricula

EL Education supports districts and schools that choose, adapt, or enhance published curricula as well as those that design their own curricula. This Core Practice addresses the use of published curricula.

When districts or schools choose published curricula, they do so in order to give all students access to challenging content and engaging lessons that prepare them for college, careers, and global citizenship. Classrooms are dynamic systems that require responsiveness and flexibility. Therefore, it is sometimes appropriate to adapt or enhance a curriculum while maintaining fidelity to standards and the integrity of the curriculum's aims and methods. Adaptation or enhancement can be a wise choice if it increases students' understanding of content, elevates challenge, addresses needed literacy or numeracy skills, and builds student engagement.

Notes:

1) Teacher-designed curricula and enhancements that engage students through case studies; projects and products; fieldwork, experts, and service learning; and learning expeditions will be addressed in Core Practices 6–10.

2) There are many other considerations for choosing curricula, such as cost, technical support, or format, that we do not address in these Core Practices.

A. Choosing Published Curricula

1. District, school, and teacher leaders choose (adopt) curricula that are research-based and supported by credible data that demonstrate student achievement. EL Education defines student achievement as mastery of knowledge and skills, character, and high-quality student work.
2. District, school, and teacher leaders choose curricula that are standards-aligned and sequenced to maximize opportunities for interdisciplinary connections and vertical alignment.
3. District, school, and teacher leaders choose curricula that provide structures and protocols to elevate student collaboration, voice, thinking, and reflection.
4. District, school, and teacher leaders choose curricula that ensure equity and access for all students. Equitable curricula:
    a. Feature texts, problems, or activities that promote multiple perspectives and understanding of multiple cultures
    b. Describe opportunities for differentiating lessons to meet the needs of all students
    c. Ensure that all students have opportunities to work with rigorous grade-level content, texts, and problems
5. District, school, and teacher leaders choose curricula that invite students to explore global studies, environmental stewardship, and topics that address equity and social justice. Such topics can engage students in compelling discussions of right and wrong.
6. District, school, and teacher leaders choose curricula that promote strong Habits of Character and create opportunities for students to practice academic courage, perseverance, collaboration, responsibility for learning, and service to their communities.
7. District, school, and teacher leaders ensure that the integration of technology as a learning tool is built into the curricula to equip all students with professional competencies such as media literacy and technology-assisted research.
8. District, school, and teacher leaders periodically review measures of student achievement to determine how well the curriculum is addressing standards. They make adjustments to curriculum maps to ensure that students are challenged and engaged and that repetition is minimized.

B. Adapting Published Curricula

1. When school and teacher leaders strategically select and adapt parts of a published curriculum, they do so to increase the challenge or engagement for students. The goal of adaptation is to maintain the integrity of the curriculum within the unique context of a particular class or school. It should be undertaken with deep intention and

a careful, deliberate process for review and adjustment of materials and lessons.

2. School and teacher leaders analyze a published curriculum for the logic of its design and flow. They ask:
   a. How does this curriculum scaffold students' knowledge and skills through the year to prepare them for the next grade?
   b. What skills and knowledge do students learn in the first parts of the curriculum that are essential for tackling the rest of the curriculum?
   c. How does the complexity of the texts, problems, and tasks included in the curriculum match the grade level being taught and the standards students are expected to meet?
   d. What is the arc of the units and lessons in the curriculum? What lessons and assessments need to occur as written to achieve the goals of the curriculum?
   e. What guidance does the curriculum offer for differentiation? What additional scaffolds could be prepared to adjust the curriculum for students with learning disabilities or those who need more challenge?
   f. What key structures (e.g., instructional routines, discussions, use of note-catchers, anchor charts) are critical to scaffold student success?
3. School and teacher leaders, based on their review, identify the specific aspects of the published curricula they will use or adapt. For example, if the curriculum is designed to address content standards not aligned to the school's own state standards, school and teacher leaders may choose to use only the parts that align with required standards.
4. When adapting parts but not all of a curriculum, leaders and teachers communicate and collaborate across grade levels and subject areas to avoid redundancy and build cohesion that ensures all students master required knowledge and skills.
5. Teachers and specialists articulate and enhance the scaffolding or extensions for students who require more challenge, English language learners, or students with disabilities.
6. Teachers augment a task in an existing curriculum only if the revised task achieves the same learning targets and enhances student engagement or authenticity (e.g., transforming a textbook task with generic information into a real-world task with specific, local information to make it more authentic for students).

C. Enhancing Curricula with Supplementary Materials and Opportunities

1. Teachers add texts to those associated with a curriculum for purposes that include:

   a) Increasing the complexity or challenge of the text

   b) Connecting to a current event or local topic of interest to students

   c) Creating more accessible reading related to the topic of study for particular students (e.g., easier reading as a supplement, not substitute, for complex text)
2. Teachers may choose to enhance curricula with media that provide a local, current, or alternative perspective; create opportunities for students to gather information digitally; or illustrate particular concepts relevant to the curricula.
3. Teachers may choose to supplement curricula with games or manipulatives that create opportunities for students to engage, explore, and apply concepts kinesthetically.

Core Practice 2

Mapping Knowledge, Skills, and Habits of Character

In the EL Education model, teachers and school leaders collaborate to ensure that schoolwide, standards-aligned curriculum maps act as the foundation for all planning, instruction, and assessment. Curriculum maps describe a vertical sequence of academic and character targets that are to be addressed at each grade level and within each discipline. These targets become increasingly more sophisticated and rigorous as students progress through the grades. Curriculum maps also provide a year-at-a-glance view of what's being taught and assessed across disciplines. They guard against unnecessary repetition of content across grades and ensure appropriate repetition of knowledge, skills, and Habits of Character as students move up through the grades.

Leaders and teachers map required standards and college readiness skills to document instruction that has already happened and revise annually to plan instruction for the upcoming year. They include learning targets, texts, topics, and tasks in their maps. They articulate the progression of interdisciplinary learning expeditions, case studies, and projects through the school year in a particular grade and spiraling up through the grade levels, as well as the disciplinary content that is taught outside of learning expeditions.

A. Standards Alignment

1. Teachers and leaders prioritize standards that will receive particular emphasis, creating opportunities for depth and repeated practice of key skills and concepts.
2. For curricula designed by the school, teachers and leaders bundle key standards into complementary interdisciplinary sets that serve as a spine for projects, case studies, and learning expeditions.
3. Teachers and leaders chunk curriculum maps by marking period so that teachers are able to reach a certain level of closure on specific standards within a term. This supports alignment between curriculum pacing and standards-based grading.

B. Mapping Learning Targets

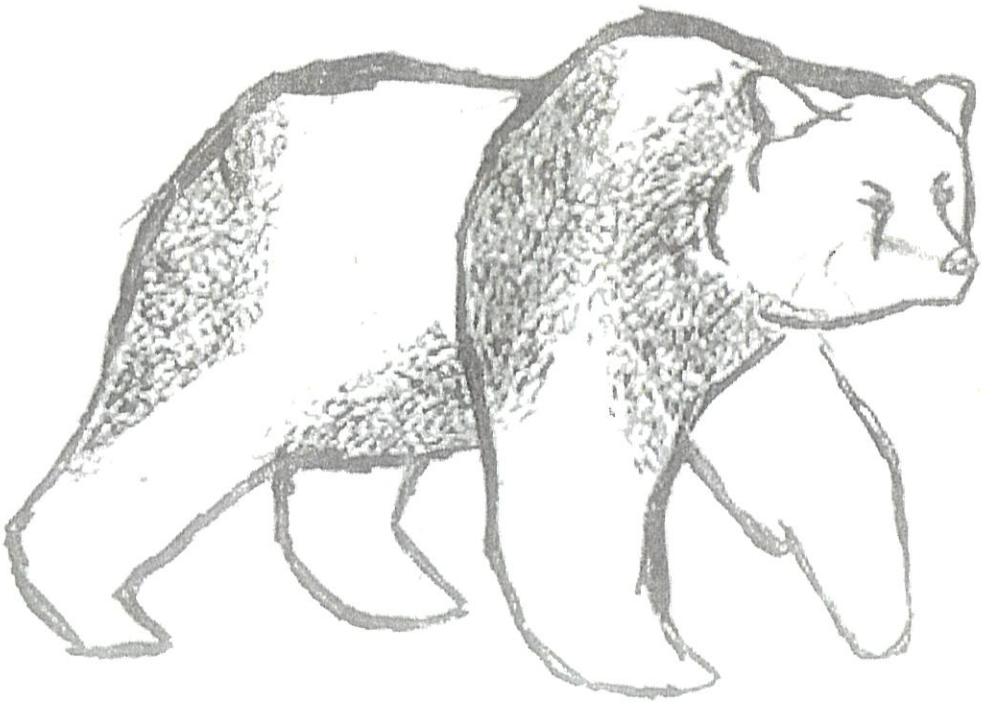
1. For learning expeditions, teachers and leaders create one cohesive map that aligns standards-based academic and character learning targets across all involved disciplines. In schools where all or most standards are being taught through learning expeditions, these will be the primary curriculum maps.
2. Teachers and leaders map standards covered outside of learning expeditions (e.g., during daily mathematics class or content-specific courses in secondary schools or when students are not "on expedition") to show when knowledge, skills, and Habits of Character are taught and how they are assessed.
3. Teachers and leaders sequence learning targets to maximize interdisciplinary connections whenever possible. For example, in language arts, students may have the target, "I can make inferences about character motivations in *The Grapes of Wrath*." In social studies, the same students may have the target, "I can explain how weather and agricultural practices contributed to the Dust Bowl."
4. Teachers and leaders sequence learning targets to support and scaffold tasks and products. For example, students working on a research paper may begin with skill targets focused on identifying accurate and reliable sources, then address note-taking targets, then writing targets, and finally revision targets.
5. Teachers and leaders map character learning targets to reflect the school's Habits of Character. They create opportunities for students to focus on and demonstrate progress toward behaviors that enable them to be effective learners and ethical people.

C. Mapping Texts, Tasks, and Assessments

1. Teachers and leaders identify anchor texts and other complex texts (both primary and secondary sources) for content topics that leverage literacy standards across the curriculum.

2. Teachers and leaders articulate the major tasks that students will do to make progress toward long-term learning targets, including priority writing standards for each marking period. This helps teachers and leaders monitor the variety and complexity in product format over time. (Performance tasks, such as student writing or other products, that are highly scaffolded and revised multiple times are not sufficient assessments of knowledge or skills but can be strong measures of students' quality of work and Habits of Character).

3. Teachers and leaders identify formative assessments (e.g., lab notebooks, reading journals), summative assessments (e.g., mathematics unit tests), and on-demand assessments (e.g., on-demand writing) of discrete long-term targets.



Core Practice 3

Supporting College and Career Readiness

The EL Education model prepares all students for college and career success by providing a college-bound curriculum with high expectations for all students, fostering a schoolwide college- and career-bound culture, and setting up structures that allow time for the post-graduation search and application process.

A college-bound curriculum includes content area knowledge and skills, such as literature and calculus, academic research and writing skills, and technology literacy. Creating high-quality work, including finished, professional-looking products, is an essential part of core and enrichment courses that prepare all students for college and careers. Habits of Scholarship, such as time management, persistence toward excellence, and "college knowledge" about such things as college admissions, financial aid requirements, and the norms and expectations of diverse college environments are also part of a college-bound curriculum. Paving the way for college and careers begins in the primary years and culminates with intensive focus in the high school years.

EL Education recognizes that there may be particular students for whom entering college may not be the optimal path. School leaders and teachers support all students to explore postsecondary options that best fit their interests and needs. They prepare all students to get accepted to college so that they have a choice now and the confidence to reapply in the future if college is the right option.

A. Promoting College-Bound Curricula

1. Teachers and leaders provide students of all ages with opportunities to develop the Habits of Character (e.g., self-management, collaboration, perseverance) that they will need to navigate the academic and social demands of college. They explicitly and continuously focus on Habits of Character in Crew.
2. Teachers in every subject area and at all grade levels teach the research skills and analytic thinking that will prepare students for the evidence-based approach of college courses.
3. Teachers in every subject area and at all grade levels teach literacy to prepare students for the complexity of texts and volume of reading and writing in college.
4. Teachers and leaders create a course schedule that gives K–8 students access to the courses and opportunities that prepare them for a college-bound high school curriculum (e.g., eighth-grade algebra, world language).
5. Teachers provide students with identified disabilities appropriate differentiated instruction, accommodations, and support to help them succeed in college preparatory courses, or differentiated guidance to help them explore appropriate work and self-supporting options after high school.
6. Leaders create a course schedule that ensures all high school students take a demanding college preparatory curriculum that is aligned to college admission requirements.

B. Building College- and Career-Ready Skills

1. School leaders, classroom and Crew teachers, and school counselors offer opportunities for students to learn about a variety of careers and the skills and habits individuals need to thrive in the workplace. For example, they hold career fairs, invite experts to share their work experiences, and encourage students to interview workers in fields of interest to them.
2. School leaders, classroom and Crew teachers, and school counselors help students explore and acquire internships that allow students to acquire work experience and learn about career opportunities and the education required to be successful in 21st-century fields.
3. Teachers ensure that technology literacy is woven throughout all subject areas and grade levels whenever resources allow. Enhancing technology literacy includes:
   a. Providing students with new technologies (e.g., design and presentation software, social networking) to access and manage information and prepare for success in a knowledge economy
   b. Teaching students the ethical and legal issues surrounding access to and use of technology
   c. Providing technology as a tool for original research that enables students to produce high-quality products, performances, and presentations
   d. Maintaining high standards for the quality of work produced using technology.

e. Establishing learning targets for the technology skills (e.g., effective use of spreadsheet or presentation software) that are distinct from learning targets for the quality of thinking and content presented in the project

4. Teachers capitalize on the ubiquitous availability of information sources to support high-quality student work. They ensure that internet technologies are used with scholarly integrity and insight (e.g., that web content sources are analyzed for validity, used wisely, and properly cited).

5. Teachers take advantage of technological innovations to support students in making things with their own hands (e.g., a robotics project that introduces physics concepts) and sometimes to extend student project work beyond the school day and the school building (e.g., making a film in a studio, using a scientific instrument in a professional lab).

6. As resources allow, teachers and leaders provide students with opportunities to learn creative and technical skills such as carpentry, music production, or engineering. (Technical skills may take the form of coursework or apprenticeships that enable a student to learn a craft or discipline).

C. Structures to Support College and Career Readiness

1. School leaders, classroom and Crew teachers, and school counselors create a college-bound culture in which all students are on a path to college and meaningful careers by:

   a. Displaying college symbols and messages in hallways, classrooms, and offices

   b. Providing opportunities to visit college campuses—starting in sixth grade if possible

   c. Teaching high school students the facts about applying for admission and financial aid and about the norms and culture of college life

   d. Inviting alumni to the school to serve as mentors and resources

   e. Discussing college at schoolwide events

   f. Promoting college resources on the school's website and other publications

   g. Celebrating college acceptances in classrooms, in Crews, and at schoolwide events

   h. Identifying and publicizing college-bound opportunities for specific populations of students (e.g., first-generation students, students of color)

2. School counselors and high school Crew teachers help students make strong course selections that are connected to college and career aspirations, monitor progress toward academic and character learning targets, and work to explore college options and navigate applications for admission, financial aid, and scholarships.

3. School counselors and/or Crew teachers invite guest speakers (e.g., recent alumni who are attending college, young working professionals, college admissions officers) to build student understanding of post-graduation life and the academic and character expectations of diverse college environments.

4. High school leaders schedule intensive classes that provide remediation for those students who need it or content-rich extracurricular opportunities for those meeting learning targets in their regular course work.

5. When appropriate for individual students, school counselors and teachers explore the value of gap-year and other post-graduation work/learning experiences that enable students to mature and build the self-directed skills that provide a doorway into college and career success.

6. School counselors and teachers educate students and families about how to maximize students' chances of college admission by maintaining a strong high school transcript, engaging in extracurricular leadership, taking required college admissions tests, etc.

7. School counselors and teachers offer evening sessions on such topics as choosing the right college and filling in financial aid applications, particularly to support parents with first-generation college applicants.

8. Leaders and teachers design graduation traditions that showcase students' accomplishment in EL Education's Dimensions of Student Achievement and provide both motivation and affirmation at the end of students' K–12 academic career.

Core Practice 4

Supporting Global Citizenship

In the EL Education model, leaders and teachers recognize that they must prepare students for global citizenship in an increasingly complicated and interconnected world and that multilingualism is a key tool and a vital global skill that deepens understanding of other countries and cultures. Curricula that prepare students for global citizenship are cross-disciplinary and include developing knowledge of diverse cultures, languages, and political systems, as well as knowledge of the physical terrains, ecosystems, and natural forces of the planet. Fully integrating global skills and knowledge into the curriculum is tied closely to environmental stewardship and social justice as students are challenged to grapple with the most complex problems facing the world (such as climate change, structures of economic inequities, and international terrorism and conflict). Teachers also ask students to discover and attend to how others see themselves, their histories, and the world's problems that is, to hear and analyze multiple perspectives along the way to determining what young people can do to make a difference.

A. Choosing or Creating Curricula That Support Global Skills and Knowledge

1. Teachers and leaders review curriculum maps to ensure that global knowledge and skills (e.g., knowledge of diverse cultures, world geography, speaking a second language) are reflected in curriculum maps.
2. Teachers and leaders choose or design curricula that enable students to thoughtfully explore multiple perspectives and cultures, as well as issues of equity and diversity.
3. Teachers and leaders create interdisciplinary curricula that provide multiple opportunities for students to build global skills and knowledge (e.g., a case study on Cesar Chavez co-taught in Spanish and language arts class, with some lessons conducted in Spanish, or a learning expedition that analyzes the consequences of climate change from different international perspectives).

B. Building Character through Global Citizenship

1. Teachers and leaders teach Habits of Character that guide students in becoming global citizens and enable them to value different perspectives and opportunities to learn from and contribute to diverse cultures (e.g., service, empathy).
2. Teachers and Crew leaders design lessons that enable students to value and strive for diversity, inclusion, and equity.
3. Teachers, leaders, and Crew leaders design learning experiences that enable students to make concrete contributions to the world around them.

C. Supporting Multilingualism

1. Teachers support all students in acquiring English language. They simultaneously incorporate and build classroom and schoolwide traditions on the perspectives, experiences, and insights of students from different countries and cultures. (They value the resource of knowledge and skills that students who speak languages other than English bring to classrooms and the school.)
2. School leaders create a schedule that enables all students to study at least one language other than English by the time they graduate from high school. They make world language learning a central part of the curriculum at all levels of instruction and begin world language instruction as early as possible with young learners.
3. Leaders create a schedule that offers world languages in extended, well-articulated sequences that develop increasing levels of proficiency at each level of instruction by teachers who are well qualified in language proficiency, cultural knowledge, and teaching skills.
4. As much as possible, teachers enhance world language learning by connecting students with cultural and artistic opportunities and empowering them to contribute to the community and the school.

Core Practice 5

Promoting Social, Emotional, and Physical Wellness

The EL Education model promotes social, emotional, mental, and physical health and wellness throughout the curriculum and schoolwide culture. Schools choose curricula that promote character development through social and emotional learning, a healthy relationship with the outdoors, and physical challenge. Healthy relationships, growth mindset, intellectual courage, exercise, stress reduction, sleep, spending time outdoors—the key elements of physical and mental health—are all included in a school's wellness approach.

Experiences in the outdoors—playing in, learning from, and appreciating nature, including on school or city playgrounds and during fieldwork in city neighborhoods—are a priority for EL Education. Whenever possible and appropriate, students are encouraged to be active and outdoors during the school day.

Crews emphasize the importance of wellness and teach explicit lessons to support wellness. The physical education program emphasizes personal fitness, self-care, inclusion of diverse abilities, and challenge by choice as well as competitive sports. Good sportsmanship, collaboration, health, and growth in fitness are emphasized over a win-at-all-costs mentality.

A. Incorporating Wellness into Curricula

1. School leaders and teachers align disciplinary standards and learning expedition topics with wellness goals. They use physical education classes, Crew, learning expeditions, case studies, and projects to teach and model wellness.
2. When adapting or enhancing curricula, selecting case studies, or designing projects or learning expeditions, teachers may include wellness as a focus of study or a product of the learning (e.g., a project researching nutrition costs and benefits in the school cafeteria as part of a broader study of health and the food economy; a proposal for bike lanes on neighborhood streets written by students).
3. Leaders, school counselors, and teachers create Crew lessons that promote social and emotional safety and health. Wellness is an explicit focus of Crew curriculum and instruction.
    a. Crew leaders create a climate of social and emotional safety for students.
    b. Crew leaders explicitly support students to understand and monitor dangers to wellness posed by alcohol, drugs, and tobacco, as well as overuse of technological devices.
4. Leaders ensure that outdoor education programs as well as individual and team sports promote health, wellness, and character development through adventure and good sportsmanship. They celebrate collaboration with teammates and personal bests, as well as competing fairly against opponents.

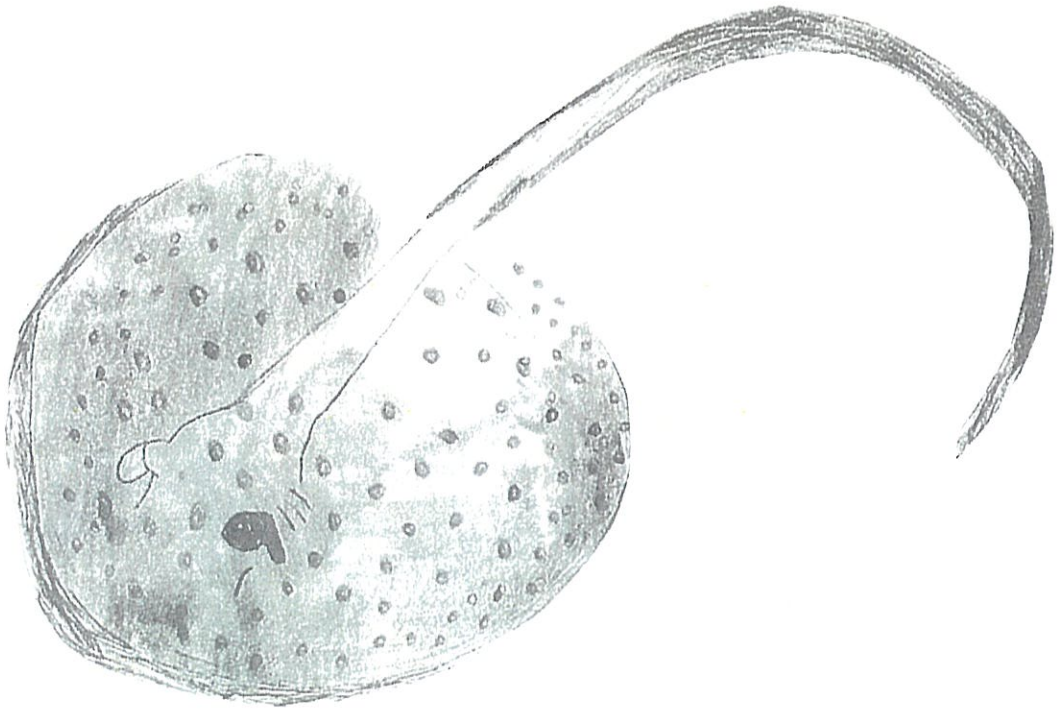
B. Creating a Culture of Wellness

1. Leaders establish policies and protocols to ensure that physical education classes, adventure programming, and fieldwork are physically and emotionally safe.
2. Leaders and teachers develop extracurricular options (clubs, support groups) that focus on wellness. They establish traditions and events (fund-raisers, community circles, schoolwide challenges) to promote and celebrate students' social and emotional health.
3. Leaders establish practices that limit the availability of unhealthy foods (e.g., soda, candy) and provide healthy and attractive alternatives.
4. Leaders and teachers promote wellness through modeling and instruction in many aspects of physical and mental health, including food, exercise, sleep, spending time in nature, and mindfulness. Teachers and Crew leaders engage students in understanding and addressing health risks.
5. All teachers promote wellness through active breaks, multisensory instruction, and classroom management that demonstrates awareness of students' mental health.
6. All teachers include active and reflective outdoor time for students whenever possible and appropriate. This energizes students' minds and bodies and encourages enjoyment of the outdoors.
7. Classroom, Crew, and physical education teachers encourage students to take on physical challenges, stretching beyond their comfort zones when it comes to

fitness and adventure. Challenge by choice, with support from a nonjudgmental Crew, is the norm in classrooms and the school. This does not mean that students can choose not to participate. It means that they are encouraged to articulate and choose the kind of participation that is challenging for them (walking around the track instead of running).

8. Teachers craft wellness learning targets and assessments that create opportunities for students to track their progress toward increased teamwork, self-management, and perseverance. They provide kind, specific, and helpful feedback and celebrate students' improvements individually and collectively.

9. Physical education teachers focus on students' strengths and differentiate for their individual needs so that all students can experience success in improving fitness and wellness.



Core Practice 6

Designing Case Studies

In the EL Education model, the term "case study" means two things. First, it is *an approach* to research: using a narrowed topic as a window into big ideas and concepts. This kind of case study is usually incorporated into projects and learning expeditions. Second, a case study can be *a structure* itself, outside of a project or learning expedition—a focused investigation that does not require (as a project does) a culminating product.

Sometimes, EL Education uses the term "case study" exactly as it is applied in the fields of law, business, or medicine, to refer to an investigation of a unique person, place, institution, or event (e.g., a study of inventors, including a case study of Thomas Edison; a study of race in America, including a case study of race in 1960s Milwaukee). Other times, EL uses the term more loosely, to refer to a narrowed subtopic that allows students to focus their research on a particular category (e.g., the topic of birds narrowed to a case study of owls; a study of the Civil War, narrowed to a case study of children in the war) or to compare different perspectives (e.g., historical and current, local and international, scientific and historical, literary and real-life). In both uses, a case study helps students focus their research and become experts on a specific topic before they generalize their learning to broader concepts and content.

Case studies are typically, but not always, 2 to 6 weeks in duration

A. Selecting Case Studies

1. Teachers choose case study topics based on priority standards for which there are ample resources that will allow students to deeply explore a narrow topic and become experts.
2. Teachers choose case study topics that enliven content and concepts through a lens that is engaging to students (e.g., a scientific study of the water cycle brought to life by a case study of the city's water supply).
3. Teachers choose case studies that allow students to engage in original research with primary source materials just as professional historians, mathematicians, scientists, and writers would.
4. Whenever possible, teachers choose case studies that focus on local issues and use local resources to help students make connections between their academic learning and the real world and build bridges between the school and local community.

B. Designing Case Studies

1. Teachers infuse case studies with literacy—reading, writing, speaking, listening, research, and vocabulary development. They infuse mathematics when there is a genuine and strategic fit.
2. Teachers prioritize the use of primary source text and data to ground research in the real world, promote discovery, and challenge students as readers and mathematicians (e.g., reading an actual police report during a case study of an incident). These texts and data, often from local sources or experts, are used for explicit instruction in literacy and mathematical skills.
3. Teachers guide students to generalize from case studies, applying their understanding to the broader knowledge and skills required by standards.
4. Teachers often begin designing learning expeditions by using a single case study and later build on two or three case studies to provide multiple perspectives. Projects sometimes align with a single case study and other times cut across multiple case studies.
5. Case studies may be part of a project that results in a product but may also stand alone without a culminating product.

Core Practice 7

Incorporating Fieldwork, Experts, and Service Learning

The EL Education model connects students to the world beyond school through meaningful fieldwork, collaboration with experts, and service learning. In addition to learning from text and classroom-based experiences, students use the natural and social environments of their communities as sites for purposeful fieldwork and service connected to academic work. They collaborate with professional experts and community members with firsthand knowledge of events and issues to ensure accuracy, integrity, and quality in their work.

EL Education differentiates between traditional field trips, in which students are often spectators, and fieldwork, in which students are active investigators, applying the research tools, techniques of inquiry, and standards of presentation used by professionals in the field.

Service learning goes beyond charitable acts, such as cleaning up a city park, and extends also to rigorous academic products that provide a service for the community, such as energy audits of city buildings that help a city save money and reduce its carbon footprint.

Fieldwork, collaboration with experts, and service learning are integral parts of learning expeditions, but they can also be used to enhance published curriculum or as stand-alone structures outside of full learning expeditions.

A. Planning and Designing Fieldwork

1. Teachers identify and plan for rich fieldwork experiences that have a clear purpose connected to the curriculum. They prepare note-catchers, procedures, or activities that allow students to be researchers, not spectators.
2. When time and resources allow, teachers schedule fieldwork over an extended period of time with several visits to the same site.
3. Teachers instruct students in procedures and skills for fieldwork before setting out or during the first visit. They create a foundation for all students to be engaged and purposeful.
4. As much as possible, teachers design fieldwork experiences based on the authentic research of professionals in the field (e.g., zoologists, historians, anthropologists).
5. Teachers select data collection tools to suit the purpose of the fieldwork. When data are collected, they are analyzed and used back in the classroom to create a product.
6. Teachers structure fieldwork so that it is safe and productive. Teachers preview sites to shape the field experience effectively and ensure accessibility for all students.
7. Leaders and teachers establish written policies and well-documented safety procedures for conducting fieldwork. These include planning for the logistics of transportation, grouping students, and adult supervision.
8. Teachers prepare students to be ambassadors for their school. Students are courteous, knowledgeable, organized, and helpful during fieldwork experiences.
9. In schools where there are barriers to transporting students off campus, teachers and leaders seek creative options for fieldwork, such as selecting case studies that can be authentically explored through on-campus fieldwork (e.g., bacteria growth in public spaces, invasive species on campus, conducting a schoolwide survey).
10. Whenever possible, teachers look for opportunities to enhance published curricula with fieldwork experiences that deepen learning for students.

B. Selecting and Engaging with Experts

1. Teachers bring experts from the community into the classroom to collaborate with students on projects, teach them skills from their field, and critique their work using professional standards.
2. Teachers reach out to experts who represent multiple perspectives and backgrounds and can expand students' understanding of the knowledge and skills they are seeking to acquire. Experts may be professionals from a particular discipline or community members with firsthand knowledge of the topic being studied.
3. Teachers prepare experts to work collaboratively with students on projects and/or products. For example, experts may help students critique their work against professional standards.

4. Teachers prepare students to greet experts with courtesy, respect, and background knowledge, with the desire that experts are surprised and delighted by the students' depth of knowledge and preparation.

5. Teachers and students orient experts to the needs of the project and the protocols for class critique.

6. Teachers support students to maintain ongoing relationships with experts. For example, teachers help students take a lead role in communication with experts before (to ensure alignment and focus), during (to keep the collaboration on track), and after (showing appreciation or sharing their work) a visit.

C. Designing and Planning Service Learning

1. Teachers incorporate service learning into projects and lessons not as an afterthought or add-on, but as an integral part of learning.

    a. Teachers connect service learning to the ethic of kindness and service that is part of school culture.

    b. Teachers use service as a prime vehicle to teach and take action centered on social justice and to address the challenges and celebrate the assets of living in community.

    c. Teachers and students research service opportunities to ensure that service learning projects provide a real benefit to the community.

2. Teachers design and plan service learning experiences that go beyond charitable volunteer work to include projects that build important *academic* skills. These experiences help students to see that academic work can be in the service of good for others (e.g., building literacy skills by collaborating with homeless shelter residents to create a guide to free city services).

Core Practice 8

Designing Projects and Products

In the EL Education model, teachers engage students in skills- and knowledge-rich learning experiences (projects) that result in high-quality products or performances for audiences beyond the classroom. EL Education defines a project as not just the tangible product resulting from learning, but as the series of classroom lessons, discussions, labs, work sessions, student research, and fieldwork that provide an in-school structure for teaching core skills and content. Projects are used to teach literacy, mathematics, and other disciplinary content and skills, as well as collaboration and problem solving.

The products of student projects are typically modeled after professional work. Whenever possible, products are critiqued by professionals and contribute to an audience beyond the classroom community. Projects can also culminate in a performance, event, or presentation (e.g., a symposium on a local health issue; an original historical play).

Teachers check for mastery of knowledge and skills throughout the project, and students track their progress toward learning targets. Students' knowledge and skills are assessed through ongoing measures (e.g., daily work, tests, journals, observations, on-demand tasks, and writing assessments). Final products and performances, which are highly scaffolded, are assessed for craftsmanship and Habits of Character such as perseverance and collaboration.

Projects are part of learning expeditions and can also be stand-alone structures outside of full learning expeditions. They may be aligned with a single case study or cut across multiple case studies.

Projects are typically, but not always, 2 to 6 weeks in duration.

A. Designing Projects

1. Teachers design projects as a central structure for learning standards-aligned knowledge and skills during the school day (not as an enrichment when core learning is done). Projects culminate in something of value shared with an audience beyond the classroom: a product (e.g., scientific report, book, museum exhibit, machine) or a performance.
2. Teachers plan backward from the final student product or performance. Lessons, labs, research, fieldwork, experts, and product creation, as well as regular assessments, are scheduled to lead up to the completion of a high-quality culminating piece, planned with the audience in mind.
3. Teachers craft learning targets for the project that include standards-aligned academic and character targets.
4. Teachers weave literacy into every stage of the project (e.g., reading and research to build understanding; speaking and listening to analyze perspectives and formulate ideas; writing for a particular purpose and audience). Literacy includes close reading of complex text and independent reading or research.
5. Teachers evaluate and choose project-related texts that will allow students to build knowledge from rich informational and/or literary texts.
    a. Teachers select anchor texts that offer multiple perspectives on the topic and opportunities to learn domain-specific and academic vocabulary, as well as disciplinary conventions.
    b. Teachers select mentor texts that model the craft, genre, or format students will be using in their own products.
6. Teachers weave mathematics into projects when it is a genuine and strategic fit. Teachers seek out primary source data and/or build data sets with students and teach specific mathematical skills and concepts through those data as part of the project.
7. Teachers involve students as much as possible in directing aspects of the project, with clear, posted, student-monitored organizational structures (e.g., learning targets, calendars, checklists, rubrics) that help students hold themselves and others accountable for their individual and group progress.
8. Teachers assess progress toward learning targets during all aspects of the project, not just at the completion of the final product. The project includes formative and summative assessments such as conferences, quizzes, tests, short written responses, and essays to give students many opportunities to practice and gain confidence in both knowledge and skills before creating a final product.

9. Teachers debrief lessons to guide students to generalize from and synthesize concepts they've learned in projects so that the learning can be transferred to other settings.

B. Planning Products and Performances

1. Teachers plan products and performances for an audience beyond the classroom, giving students an authentic reason to care about quality.
2. Teachers craft product descriptors and assignments that clearly articulate expectations, including learning targets, criteria, and rubrics that define a successful product and the steps (including deadlines) for planning, revising, and polishing the product over time.
    a. Products and performances are modeled on professional-world formats rather than artificial scholastic formats (e.g., students create a scientific exhibit for a local museum rather than a science poster for the classroom).
    b. Typically, all students work toward the same product format (e.g., scientific report, architectural blueprint, historical play) to engage the power of the classroom community to focus together on the same key skills and format and to support quality through common models of excellence and critique.
    c. Within the common product format, there is room for students to make creative choices (e.g., all students may create architectural blueprints, but students choose the design of their own building).
    d. For group projects, the product is designed so that the work of each student can be evaluated individually, ensuring accountability for all students.
3. Teachers plan lessons and experiences that enable all students to produce high-quality work. Planning for high-quality work includes the following steps:
    a. Identifying professional or student-work models that will help students see what's expected of them
    b. Planning explicit skill lessons that will prepare students to execute the product successfully
    c. Scheduling time that will allow students to complete multiple drafts or rehearsals
    d. Planning critique lessons and feedback protocols
    e. Setting benchmarks for completion of each component or phase in a product to keep students on track
    f. Making some components mandatory for all students and others optional to differentiate instruction for a range of learners
    g. Planning for any technological skills students may need to acquire to be successful in the project (e.g., recording and analyzing data, graphic design, presentation)
4. Teachers design the summative assessment of the final product to focus not on knowledge and skills—which have been assessed during the course of the project—but on the attributes of high-quality work (craftsmanship, complexity, authenticity) and Habits of Character (e.g., perseverance, responsibility for learning). (See also *Core Practice 12: Planning for and Supporting High-Quality Student Work.*)

Core Practice 9

Designing Learning Expeditions

Learning expeditions are the signature EL Education curricular structure. They make standards come alive for students. These long-term, in-depth studies offer real-world connections that inspire students toward higher levels of academic achievement. Learning expeditions involve students in original research, critical thinking, and problem solving, and they build character along with academic skills. All learning expeditions explicitly focus on building literacy skills, particularly in reading and writing informational text and writing from evidence.

Learning expeditions take multiple, powerful elements of the EL model (see Core Practices 6–8) and join them together. All of these structures can also be used independently, outside of full learning expeditions.

Learning expeditions are typically 6 to 12 weeks in duration, though sometimes longer.

A. Planning for the Scope and Components of Learning Expeditions

1. Teachers plan learning expeditions to include the following components: a kickoff experience, guiding questions, one or more projects or case studies that lead to a product, lessons, fieldwork, experts, a culminating event, and often service learning.
2. Teachers plan learning expeditions so that when students are "on expedition," the expedition topic, lessons, and work provide the through-line of their school day across subject areas and, usually, across periods of the day.
    a. In middle and high school classrooms, students may be "on expedition" for a given term in some courses and learning through more traditional disciplinary structures in others. Learning expeditions may be led by a multidisciplinary team or by a single teacher within a subject area that includes interdisciplinary features (i.e., learning expeditions are interdisciplinary, but not necessarily with an equal balance of disciplines).
    b. Learning expeditions integrate skills of reading, writing, listening, speaking, numeracy, and research, as well as critical thinking, problem solving, and collaboration. Explicit literacy instruction, using relevant and appropriately complex text, takes place in learning expeditions at all grade levels.

B. Planning and Refining Learning Expeditions

1. Individual teachers or teaching teams construct or customize learning expeditions.
    a. Teachers design learning expeditions well in advance and begin with the product or performance in mind.
    b. Teachers calendar the components collaboratively and realistically so that students will have time to complete projects and associated products and performances with quality. Whenever possible, they engage students in scheduling and committing to deadlines.
    c. Teachers anticipate that students will take on increasingly more leadership during a learning expedition and that the scope and final product of the expedition may change or expand accordingly.
2. Leaders and teachers create structures for critiquing, revising, and documenting learning expeditions for quality and longevity.

C. Choosing, Focusing, and Unpacking the Compelling Topic

1. Teachers choose learning expedition topics that engage student curiosity and passion by providing opportunities to connect historic, scientific, and other disciplinary concepts to local contexts and specific case studies that make learning more concrete, relevant, and enduring. A compelling topic has the following characteristics:
    a. It is centered on important content standards identified in curriculum maps.
    b. It addresses literacy standards so that students experience the powerful connection between reading about a topic and writing effectively about a topic.
    c. If the topic asks students to apply problem-solving or data analysis skills, it addresses relevant mathematics standards.
    d. It has rich potential for reading complex texts and primary sources from the discipline of study.
    e. It takes a broad content (e.g., the Revolutionary War, Newtonian physics) and focuses it with at least one narrow case study or project that engages students and clarifies concepts (e.g., the role of a local city in the Revolutionary War, the physics of car accidents).

f. It offers strong possibilities for original research and the creation of high-quality products for an authentic audience.

g. It invites students to conduct fieldwork, investigate community resources and issues, and build on their reading knowledge by collecting data, interviewing citizens and experts, and creating products that meet a real community need.

h. It focuses on issues of cultural diversity, equity, social justice, or environmental stewardship. It allows students, in developmentally appropriate ways, to engage in compelling conversations about their ideas of right and wrong.

i. It provides opportunities for students to analyze multiple perspectives, voice their opinions, construct arguments supported by evidence, and serve their communities.

2. Once teachers have identified a compelling topic, they craft one to three guiding questions that do the following:

   a. Frame inquiry into the topic and lead students to enduring understanding of broader issues and fundamental concepts within and across disciplines

   b. Provide the "so what" and "who cares" for students. Guiding questions help students make connections among lessons, projects, and case studies and see the big picture of their learning

   c. Avoid singular "right" answers (e.g., Who were the founders of our nation?) or presuppose a partisan or political stance (e.g., Why should we save Statesville Creek?)

   d. Reveal fundamental debates and concepts of a discipline and the essential questions that scholars such as scientists and historians must grapple with in their work (e.g., Whose story is told when history is written?)

   e. Are phrased to be student-friendly, age-appropriate, memorable, and thought-provoking (e.g., What is a healthy life?)

   f. Can be referred to strategically throughout the learning expedition as students develop increasingly informed and sophisticated responses to these questions, individually and as a group

3. Teachers use the Four T's (Topic, Task, Targets, and Text) framework to strengthen a cohesive learning expedition plan.

   a. They identify a compelling **topic**.

   b. They plan challenging, engaging **tasks**, including assessments, that align with the learning targets.

   c. They craft learning **targets** for content and skills based on required standards that drive the learning expedition.

   d. They choose challenging, engaging **texts** that align with the targets.

4. Teachers document their learning expedition plans and create standards-targets-assessment documents.

D. Planning for the Flow of Learning Expeditions

1. Teachers plan a kickoff or immersion experience for students that ignites curiosity and sparks interest in a topic. The kickoff is designed to:

   a. Build background knowledge in the learning expedition content

   b. Raise questions rather than answering them

   c. End by revealing the guiding questions and an opportunity for students to debrief by forming connections to the questions and brainstorming ways to pursue answers

2. Teachers plan reading, fieldwork, and research experiences that allow students to become experts in the topic. These experiences may include:

   a. Building background knowledge through reading primary sources or other texts

   b. Interviewing experts who come to the classroom to speak about case study topics

   c. Investigating a case study topic through research

   d. Conducting laboratory experiments or fieldwork to collect data

3. Teachers plan how students will work on the final product throughout the learning expedition as they acquire and refine their knowledge and skills. This plan includes how and when students will:

   a. Take notes and record information needed for the product

   b. Make decisions about design and organization of their product

   c. Learn skills needed to be successful on the product

   d. Draft the product

   e. Critique, revise, and polish the final product

4. Teachers plan a culminating event or celebration of learning that features high-quality student work. The plan for presentation includes the following:

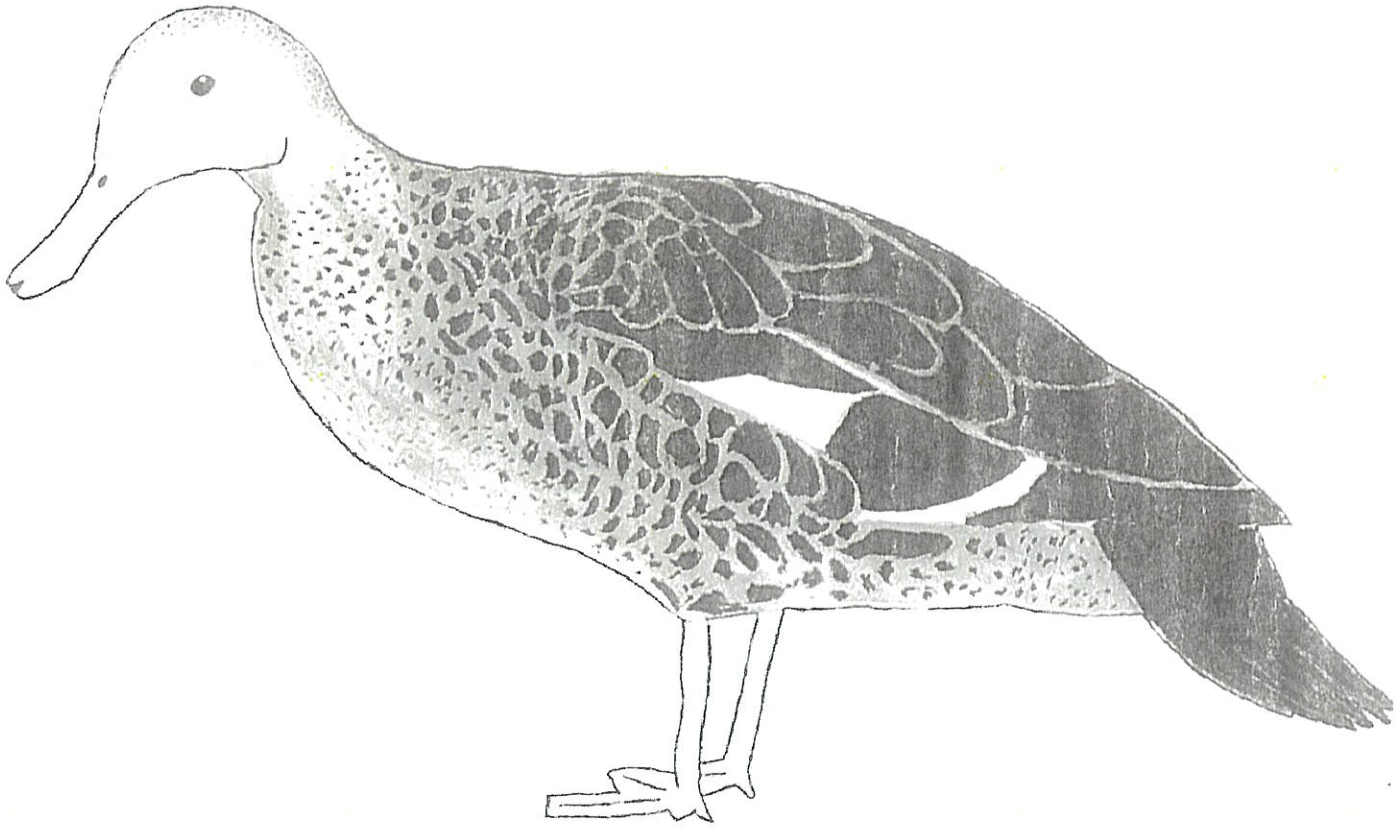
   a. Logistics that support students to be the main

presenters or docents at the celebration. Students act as teaching experts to explain or perform their work rather than simply displaying it.

b. Time to display student work in a beautiful and professional way that calls attention to craftsmanship and authenticity

c. Drafts of student work and other indicators of the process by which students created their work (e.g., documentation panels that tell the story of the learning and of students' growth and perseverance)

d. Ways for the audience to interact with students by asking questions, providing feedback, or reflecting with students

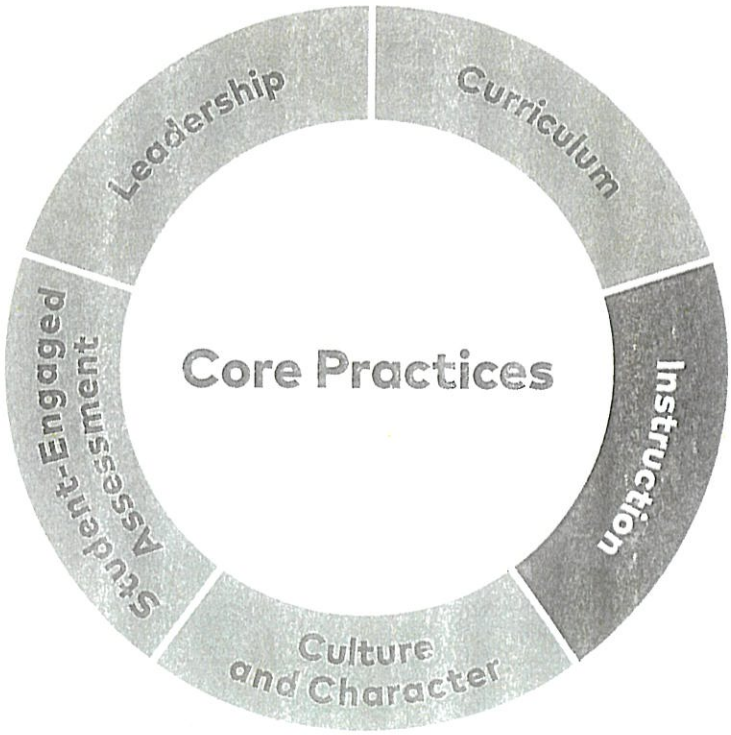


Instruction

EL Education promotes instruction that is alive with discovery, inquiry, critical thinking, problem solving, and collaboration. Teachers talk less. Students talk and think more. Lessons challenge, engage, and empower students with complex issues, text, and problems. They lift up big disciplinary ideas and give students practice with the tools and skills professionals use in the real world as they create high-quality work. Teachers differentiate instruction and empower all students to be self-directed, independent learners.

Core Practices in This Domain

- Planning Effective Lessons
- Delivering Effective Lessons
- Planning for and Supporting High-Quality Student Work
- Teaching Reading across the Disciplines
- Teaching Writing across the Disciplines
- Teaching Mathematics
- Teaching Science
- Teaching Social Studies
- Teaching in and through the Arts
- Differentiating Instruction
- Teaching English Language Learners



Core Practice 10

Planning Effective Lessons

Lessons are the building blocks of all curricular structures in the EL Education model. Whether planning a single lesson or a series of lessons, teachers attend to how the lessons sit in the larger arc of curriculum. They carefully craft a beginning, middle, and end, regardless of lesson type. By attending to each lesson with care, teachers ensure that all students are challenged, engaged, and empowered and can transfer their understanding to new contexts. They also give students opportunities to develop and demonstrate Habits of Character.

Effective lesson planning begins with crafting clear standards-based learning targets in student-friendly language. Teachers plan strategies that ignite student curiosity and track student understanding, and they maximize opportunities for student voice, critical thinking, and leadership. Thoughtful lesson design leads students to want to learn, to work collaboratively, and to be aware of their learning process.

A. Designing the Lesson

1. Teachers craft high-quality learning targets in student-friendly language that reflects teachers' knowledge of their standards and their students. (See also *Core Practice 28: Crafting and Using Learning Targets.*)
2. Teachers vary the lesson formats they use. They make strategic decisions about format based on the learning targets and the needs of students.
3. Teachers craft lessons that set a clear purpose and ensure challenge. Teachers plan for challenge by asking the following questions of themselves:
    a. Based on required standards, what knowledge, skills, or habits do I most want my students to learn?
    b. How challenging are the texts I'm asking students to read relative to grade-level standards? How challenging are the tasks I'm asking them to do? What level of thinking (e.g., remembering, analyzing, creating) is required for this work?
    c. Am I giving students an opportunity to grapple? Am I making space for uncertainty and creative problem-solving?
    d. What questions should I ask? What is the purpose of each question?
4. Teachers scaffold instruction in the body of lessons to maximize student participation and discourse so that teachers talk less and students talk and think more. Teachers plan for engagement by asking the following questions of themselves:
    a. What will cause students to be curious and want to learn?
    b. How will I provide students with a vision of the learning target(s) in a way that gives them ownership of their learning?
    c. What lesson format will engage students in the day's key learning? What protocol or prompt will push students to ask questions of each other and encourage discussion?
    d. What do students already know? What sequenced steps will help them build new knowledge and skills?
    e. What framing question or task can I provide to connect students to an authentic personal, disciplinary, or social issue to engage and deepen their thinking?
    f. How will I differentiate for the needs of my diverse learners so that all are effectively supported and appropriately challenged?
5. Throughout the lesson and especially as it concludes, teachers help students to synthesize their current understanding and reflect on their progress so that students retain skills and concepts beyond an individual lesson or unit. Teachers plan for empowerment by asking the following questions of themselves:
    a. How will I structure the lesson so that students take responsibility for their learning? How will they assess and track their progress? How will we debrief learning experiences?
    b. How will students know what quality looks like, and how will I support them in producing high-quality work?
    c. Are there parts of the lesson that I can turn over to students to lead?
    d. Does the lesson give students an opportunity to articulate why the learning matters and how they might use it in new contexts?
    e. How will I help students capture key concepts so that they can remember them beyond the lesson?

B. Choosing a Lesson Format

1. Teachers choose a **Workshop 1.0 lesson format** when students have minimal background knowledge of the skill or content, or when first establishing classroom norms and building student confidence in learning strategies. Workshop 1.0 is a traditional "gradual release" lesson format, with the teacher modeling a skill and leading guided practice before students work on their own. Workshop 1.0 includes the following sequence of components:

   a. *Introduction*: The introduction taps into students' curiosity, sets a positive tone, builds the need to know, and links to previous learning. The learning target is shared during the introduction.

   b. *Mini lesson*: The mini lesson shows students how to meet the learning target through direct instruction. The teacher prepares students for success during practice by providing an explicit model of proficiency. The mini lesson may include modeling, think-aloud, demonstration, or mini lecture.

   c. *Guided practice*: Guided practice allows the teacher to assess student readiness for working independently by providing an opportunity for all students to try what was modeled with ample support. The teacher renames steps and addresses misconceptions.

   d. *Independent practice*: During independent practice, students practice what was modeled independently of the teacher. Teachers facilitate student thinking and understanding by asking probing questions and assess students' proficiency in relation to the learning target.

   e. *Sharing*: Teachers invite students to share work and ideas that show progress toward the learning target. Students and teachers celebrate successes.

   f. *Debrief*: Teachers invite students to create meaning by debriefing the lesson. Students think about the learning process and name how the lesson furthered their learning. Students and teachers assess proficiency toward the learning target and identify next steps.

2. Teachers choose a **Workshop 2.0 lesson format** when students are ready for more individual grappling with text and problems and less teacher modeling and guided practice. Workshop 2.0 is a revision of the traditional workshop model designed to address the demands of more rigorous standards. Workshop 2.0 includes the following sequence of components:

   a. *Engage*: Teachers engage students with a question, quote, object, picture, or problem that spurs thinking and invites them into the lesson's purpose or topic.

   b. *Grapple*: Teachers invite students to grapple independently with a complex text or problem. In early grades, this may be listening to a text that is read aloud.

   c. *Discuss*: Teachers provide a structured protocol that enables students to discuss, collaborate, and critique their interpretations or solutions for the problem or text.

   d. *Focus*: The teacher presents the learning target and a mini lesson or guided practice that introduces new concepts or skills, "mops up" misconceptions, or refocuses students' learning.

   e. *Apply*: Teachers ask students to apply their learning to a task that provides an opportunity to meet the learning target. During this section, the task may be differentiated, providing guided instruction for some students, but the text and target remain the same for all.

   f. *Synthesis*: Teachers invite students to debrief what they learned, share their reflection about how they learned, and assess their progress toward the learning target.

3. Teachers choose a **Discovery-Based lesson format** when they wish to prioritize exploration of new concepts or materials and to build curiosity and creative thinking. Teachers start a discovery-based lesson, such as the 5E's, with a provocative experience or problem that will help students to understand a broad concept within a discipline. They invite students to grapple with the problem in their own way, and then build skills, vocabulary, and conceptual understanding on a "need to know" basis. Learning targets are shared, or co-constructed with students, after exploration, discovery, and discussion. The components of a typical discovery-based lesson—the 5E's—follow:

   a. *Engage*: Teachers engage students (e.g., with a demonstration, brainstorm, problem) to raise questions and elicit responses that uncover what students know or think about the topic.

   b. *Explore*: Students then explore the topic together, without direct instruction from the teacher. The teacher asks probing questions of students and listens as they make meaning.

   c. *Explain*: Teachers ask students to explain their thinking based on their explorations and provide students with clarifications, definitions, and direct instruction.

   d. *Extend*: Students extend their knowledge of the topic by applying concepts and skills to new problems and tasks.

   e. *Evaluate*: Teachers assess students' knowledge or skills and ask them to assess their own learning.

4. Teachers choose **Protocol-Based lessons** when they wish to support students to discuss, collaborate, consult, share, critique, and present more productively and effectively.

Questions to consider when planning protocol-based lessons include:

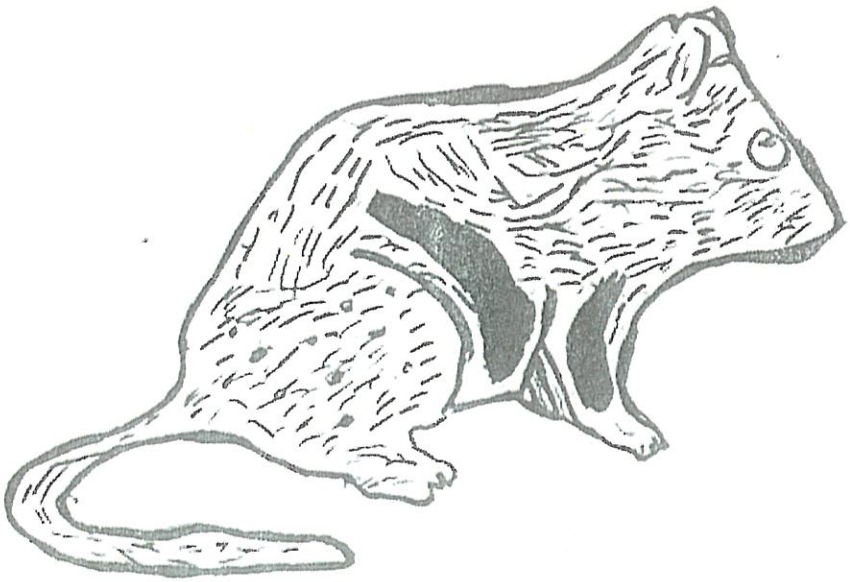
a. What materials are needed to support the protocols (e.g., discussion role cards, peer critique response forms)?

b. Will the protocol last the entire lesson or support just one segment of the lesson? A lesson-length protocol structures an entire class period for a particular purpose. A Building Background Knowledge Workshop (BBK), a Socratic Seminar, and the Peer Critique protocol are examples of lesson-length protocols. Brief protocols such as Say Something, Turn and Talk, or Numbered Heads Together can be used to structure conversation and collaboration during one segment of a lesson.

5. Teachers choose **other lesson formats**—lecture, video, work sessions, labs, games—for specific purposes. Teachers embed engagement strategies to make the format more active when using lectures, video screenings, work sessions, and labs (e.g., using graphic organizers, mid-session questioning or critique, and Pair-Shares).

   a. When students are learning content or practicing and mastering foundational facts, video, lectures, or memorization games may be appropriate.

   b. When students are applying knowledge and skills to tasks, products, or performances, extended work sessions and labs may best serve the purpose.



Core Practice 11

Delivering Effective Lessons

In the EL Education model, teachers engage students in meaningful and productive work throughout the class period. When delivering lessons, teachers create purpose and build curiosity for students. They use classroom management techniques that promote equity and create a respectful, active, collaborative, and growth-oriented culture. They make time to confer with students and are aware of each student's level of understanding and participation. Teachers use practices that ensure all students grapple with challenging content. Teachers foster character by building positive relationships with students and inspiring each student to develop craftsmanship, perseverance, collaborative skills, and responsibility for learning. They promote critical thinking by asking that students make connections, perceive patterns and relationships, understand diverse perspectives, supply evidence for inferences and conclusions, and generalize to the big ideas of the discipline studied.

A. Starting with a Challenge and Setting Purpose

1. Teachers engage students with a task that invites them to grapple with the text or problem of the lesson. They use questions, graphics, video, artifacts, or hands-on experiences to connect students to the big idea or concept addressed in the lesson.
2. Teachers verbalize how new ideas and content build on prior instruction or students' prior knowledge.
3. Teachers strategically share learning targets with students during the focus section of a Workshop 2.0 lesson, or after a "hook," mystery experience, or discovery period.
4. Teachers pose strategic and open-ended questions that build students' curiosity and elicit multiple responses and perspectives from students.
5. Teachers describe next steps in the learning to orient students in the project or series of lessons and to provide the big picture for their learning.

B. Managing Students in the Active Classroom

1. Teachers develop and teach routines that maximize instructional time and student responsibility for effective lessons.
   a. Teachers streamline tasks that are non-instructional (e.g., taking attendance).
   b. Teachers establish routines for dealing with lesson interruptions such as visitors, announcements, and transitions. Students are able to refocus quickly.
   c. Teachers have routines for managing materials, furniture, and space. Students become adept at organizing the classroom for varied types of lessons and purposes.
   d. Teachers use specific and respectful techniques or signals for quickly getting and maintaining students' attention (e.g., call and response, raised hands, rhythmic clapping).
   e. Teachers introduce a brand-new skill or routine using demonstrations, think-alouds, role-plays, or Fishbowls to show what meeting the learning target looks like, for both academic learning targets and character learning targets.
   f. Teachers provide an instructional task (e.g., "do now" posted on the board) for when students enter the classroom or at the beginning of a lesson. Students always know what to do when they enter the room for a lesson.
2. Teachers use strategies to ensure that all students participate and embrace individual accountability.
   a. Teachers group students intentionally with the purpose of the activity in mind—for independent work, paired work, or larger groups. Groups are sometimes heterogeneous and sometimes homogeneous, depending on the purpose (e.g., students with different strengths and jobs working collaboratively on a problem; students with similar interests working collaboratively on a product; students working on the same phonetic or mathematical concept).
   b. Teachers provide or teach students to create graphic organizers, journals, concept maps, or other note-catchers that enable every student to record and represent thinking.
   c. Teachers create and post anchor charts, word walls, and other forms of "public notes" to synthesize student understanding and to provide students with a reference for future learning.
3. Teachers use protocols that model and encourage all students to participate respectfully in classroom discourse, take responsibility for their own learning, and contribute to the collective understanding of the group. Protocols

are procedures for discussion, collaboration, consultation, sharing, critique, and presenting that make classroom discourse more productive and effective. When using protocols, teachers implement the following strategies:

a. Explicitly teaching, rehearsing, and monitoring the steps of a selected protocol when it is first introduced

b. Using protocols in daily lessons when students are analyzing and discussing text, collaborating to solve problems, or critiquing each other's work

c. Using protocols to facilitate classroom meetings and Crews

d. Supporting students to reflect on how effective the protocol was and to revise and improve their use of the procedure

C. Supporting All Students[1]

1. Teachers gather detailed information about students' learning backgrounds, strengths, challenges, readiness, and interests.
2. Teachers pre-assess and/or ask students to self-assess against learning targets in order to determine flexible student groups and to provide all students with respectful tasks that will move them toward proficiency.
3. Teachers explicitly and intentionally teach academic and domain-specific vocabulary.
4. Teachers explicitly and intentionally teach background knowledge to fill in the gaps for students with less exposure to select topics.
5. Teachers scaffold instruction and tier assignments to support, challenge, and empower a variety of learners.
   a. Teachers provide appropriate scaffolding during lessons (e.g., chunked text, annotated graphic organizers, guided practice).
   b. Teachers provide more complex (not just more) tasks for advanced learners (e.g., supplementary text, extension problems).

D. Empowering Students through Reflection and Student-Engaged Assessment[2]

1. Teachers intentionally build a culture of collaboration, trust, and growth in which students feel that they belong and are respected. (See also *Core Practice 21: Creating a Community of Learning.*)
2. Teachers check for student understanding throughout lessons to ensure that every student demonstrates progress toward learning targets.
3. Teachers make time at the end of the lesson to debrief with students. They use varied structures to help students synthesize their current understanding and reflect on their progress so that students retain skills and concepts beyond an individual lesson or unit.
   a. Teachers invite students to identify the thinking and problem-solving strategies they use during a lesson.
   b. Teachers ask students to reflect on how their thinking has changed over time.
   c. Teachers invite students to set goals for future learning and apply their learning to new contexts.
4. Teachers track students' progress toward mastery of learning targets regularly by using exit tickets, strategic observation, clickers, or other checks for understanding.
5. Teachers confer with students individually and in small groups to monitor each student's level of understanding and identify class-wide patterns.
6. Teachers provide structures (e.g., data trackers, portfolios) that teach students how to reflect on their own learning and collect evidence of growth.
7. Teachers keep observational and anecdotal records during student work sessions and when conferring with students and use them to inform next steps in instruction.
8. Teachers support students to lead their own learning by setting goals, analyzing data, and tracking their own progress (e.g., graphing their own reading fluency, analyzing patterns of error on a math test).
9. Teachers strategically administer on-demand assessments that accurately measure students' mastery of learning targets.

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1. See also *Core Practice 19: Differentiating Instruction*
2. See also *Core Practice 29: Checking for Understanding in Daily Instruction*

Core Practice 12

Planning for and Supporting High-Quality Student Work

The EL Education model compels students to produce high-quality work that demonstrates complexity, craftsmanship, and authenticity. Teachers plan deeply to support students in creating products that demonstrate these qualities. They support students to create products for audiences beyond teachers and parents (e.g., a whole-class scientific study of a local pond, resulting in a water-quality report for the city board of health). Creating real work for real audiences motivates students to meet standards and engage in revision. In the process, they develop perseverance and realize that they can do more than they thought possible.

To create a culture of excellence, teachers have high expectations for all students and support all students with the scaffolding and equitable opportunities they need to achieve excellence. Students analyze models of excellence—student work and professional work—and use those models to build criteria for excellence in that genre of work. They receive targeted feedback from teachers, experts, and peers based on established criteria and revise their work through multiple drafts.

Teachers and school leaders analyze student work samples, task descriptors, and rubrics in professional learning to develop a common understanding of how to build complex, engaging tasks and how to support students to achieve high-quality work and meet standards.

A. Planning for Complexity in Student Work

1. Teachers design tasks that ask all students to do higher order, complex thinking. When creating the assignment, they consider the following questions:
    a. Does it connect to the big concepts that undergird my discipline or unite disciplines?
    b. Does it prioritize transfer of understanding to new contexts?
    c. Does it prioritize consideration of multiple perspectives?
    d. Does it require strong literacy skills, such as analyzing complex text and using text-based evidence to support writing or speaking?
    e. Does it require higher-order thinking skills like applying, analyzing, evaluating, and creating?
2. Teachers scaffold lessons to give all students practice in succeeding at higher-order thinking and decision-making. Scaffolding strategies include the following:
    a. Differentiating assignments to allow for student choice, interest, and innovation
    b. Considering the background knowledge, perspectives, resources, and home support of all students to make product creation accessible and equitable for all students
    c. Requiring students to do the planning and decision-making that allow them to apply knowledge and skills in a new way

B. Planning for Craftsmanship in Student Work

1. Teachers plan backward from their vision of the product to identify supports students will need to create work that is accurate, detailed, and beautiful. With consideration for time and resources, their planning includes the following steps:
    a. Whenever possible, "test-driving" the product by creating their own in order to determine where students may struggle or need additional supports
    b. Identifying models of the product that can be used for critique lessons with students
    c. Identifying and acquiring professional tools and materials that enable students to master the conventions of the medium
    d. Sequencing skill lessons that enable students to learn and practice techniques required to create a high-quality product
    e. Identifying and contacting experts from within or outside the school who can share their wisdom, techniques, and the vocabulary of their field
    f. Sequencing lessons and scheduling adequate time for students to revise and polish their work multiple times in response to feedback

C. Planning for Authenticity in Student Work

1. Teachers plan backward from their vision of a product to ensure that it feels authentic to students and has meaning in the larger community. With consideration for time and resources, their planning includes the following steps:
   a. Choosing products that use work formats and standards from the professional world, rather than artificial school formats (e.g., students create a book review for a local newspaper instead of a book report for the teacher)
   b. Choosing products that connect academic standards with real-world issues, controversies, and local people and places
   c. Identifying or working with students to identify an audience beyond the teacher
   d. Building into the assignment opportunities for choice based on interest or learning style
   e. Identifying opportunities—collaboration with experts, fieldwork, or service experiences—that can enhance the authenticity of the product
   f. Prioritizing the original thinking of students—authentic personal voice and ideas, rather than memorized content or filling in blanks
   g. Looking for ways to motivate students with products that are also acts of service (e.g., creating informative signage for a local stream restoration project)

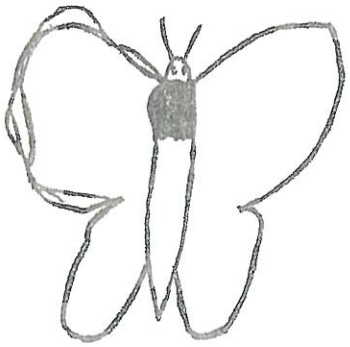
D. Developing a Culture of Excellence

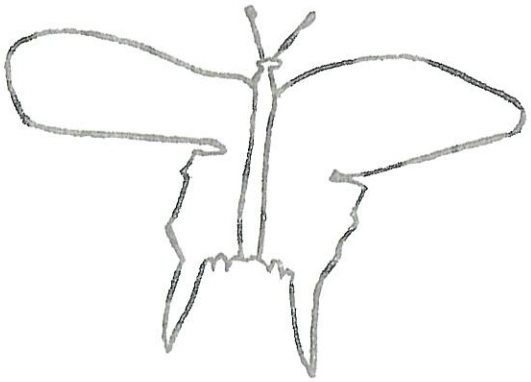
1. Teachers create a classroom climate where students are excited about the opportunity and challenge of work, feel accountable to the group for deadlines, and demonstrate ownership of and pride in the work they create. (See also *Core Practice 22: Fostering Habits of Character.*)
2. Teachers create a culture of meaningful reflection and self-assessment by regularly engaging students in critiquing models or exemplars (either professional or student-created) and giving and receiving feedback on their own and peers' work. They establish norms that keep both formal and informal feedback emotionally safe, respectful, and always kind, specific, and helpful.
3. Teachers collect compelling models of work from students within and beyond the school and from the professional world. They display them to inspire high standards.
4. Teachers and school leaders regularly examine student work samples in grade-level teams, disciplinary teams, or whole-school professional learning to assess student understanding and skills. They assess assignments for their alignment to standards, complexity, authenticity, and high degree of craftsmanship. They identify strategies to support all students in achieving high-quality work.

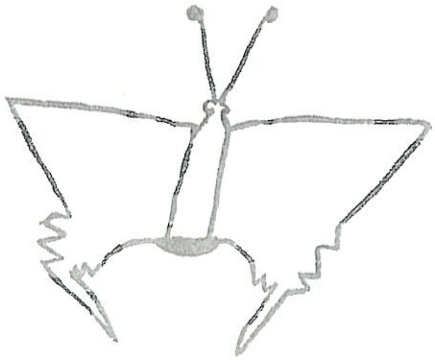
E. Using Models, Critique, and Descriptive Feedback to Produce High-Quality Work

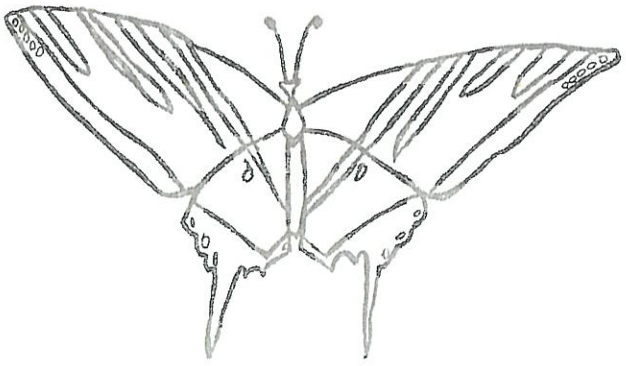
1. Teachers often structure lessons as whole-class critique sessions.
2. Teachers and students examine models of student work or professional work in order to name what quality looks like and identify strategies for improving quality.
   a. Teachers seek out inspiring and compelling models in the chosen genre so that students are excited to begin their own work.
   b. Teachers generate criteria lists with students and use them to construct task descriptors and rubrics. For example, instead of telling students what makes a good essay, students together critique essays of varying quality and create a list of qualities of a good essay.
   c. Teachers curate an archive of models, particularly in genres frequently used by students (e.g., lab reports, math word problem solutions).
3. Teachers demonstrate and teach protocols that support students in giving feedback to their peers. Teaching students to give and receive feedback includes the following:
   a. Modeling what giving and receiving quality feedback looks like and sounds like
   b. Developing specific questions to guide the protocol so that students focus on select aspects of the work (e.g., organization, detail)
   c. Using the same protocol multiple times and debriefing the process each time to build students' skills in giving and receiving kind, specific, and helpful feedback
4. Teachers sometimes invite guest experts to visit the classroom to give feedback on student work. Teachers prepare experts to focus on specific learning targets, model the classroom/school norms for communication, and build vocabulary and standards of the profession.
5. Teachers confer with students to provide descriptive feedback or comment on student work in writing during drafting and revision. This feedback *for learning* does not serve as an evaluative score or grade.

6. Teachers provide descriptive feedback that:
   a. Directs attention to the intended learning
   b. Is timely, ensuring that there is time for students to act on the feedback prior to summative assessment
   c. Addresses targeted misunderstandings and provides focused suggestions that students can act on
   d. Prompts students to think rather than simply make corrections
7. Teachers support students in analyzing their own thinking, writing, and creative process so that they can identify next steps for revision that refer back to agreed-upon criteria and move the work toward mastering learning targets.
8. Teachers require students to revise work intended for a public audience multiple times with the aim of meeting or exceeding the rubric criteria and achieving high quality (complexity, craftsmanship, and authenticity).









Core Practice 13

Teaching Reading across the Disciplines

In the EL Education model, teachers in all subjects and grade levels teach reading so that students build knowledge of the world and make sense of content by reading, thinking, talking, and writing about compelling topics. Teachers also provide many opportunities for students to read for joy, to satisfy innate curiosity, to revel in the pleasure of creative language, and to be transformed by interaction with other readers and writers.

Teachers challenge students to collaboratively and independently grapple with complex informational and literary texts. Teachers differentiate lessons to enable all students to comprehend a variety of grade-level texts, including primary sources, informational articles, literature, poetry, data sets, and real-world texts like speeches and informational graphics.

Teachers also provide texts at students' independent reading level, both for group or independent research (on the class topic of study) and for pleasure (on any topic of their choice). Teachers immerse students in reading for understanding and in lessons that require thinking, talking, and writing about text so that students develop the habit of supporting their claims with evidence when they speak and write. Content area teachers support students to read the formats and types of texts typical of their content (e.g., science articles, data sets) and to use domain-specific as well as academic vocabulary.

Across the grade levels, teachers focus on age-appropriate reading skills. For example, in primary grades, teachers balance content-based literacy and structured phonics lessons. At the secondary level, teachers of mathematics, science, history, technology, and the arts explicitly teach and support students to be strong readers of text within their discipline.

A. Planning for Reading Instruction

1. Teachers plan literacy-rich projects, case studies, and learning expeditions around compelling topics. They select a variety of texts—different genres, formats, reading levels, primary and secondary sources, data sets, and texts representing diverse perspectives on a topic—to teach content and develop skills. Teachers choose texts strategically to help students make meaning about a topic addressed in multiple texts.
2. Teachers of all subject areas and in all grade levels prioritize reading and text selection as part of the planning process. They ensure that students read a balance of informational and literary text. In language arts and humanities classes, as well as interdisciplinary studies, they frequently pair informational and literary texts so that topics resonate and both literary and informational texts have greater relevance for students.
3. Teachers choose or design curriculum and lessons that give students compelling reasons to read and promote a need-to-know culture of reading in the classroom.
4. Teachers evaluate text for quantitative and qualitative measures of complexity as part of planning lessons and longer units of study.
5. For close reading, teachers ensure that all students have access to grade-level complex text. They may differentiate the length of text and the tasks required of students to access the text but avoid differentiating the texts themselves. When students are reading independently for research or pleasure, teachers provide varied texts so that students at all levels read texts that they can comprehend independently. (See also *Core Practice 19: Differentiating Instruction.*)
6. Teachers select protocols and lesson formats (e.g., Workshop 2.0) that encourage students to process text through thinking, talking, and writing.
7. Teachers plan text-dependent questions in advance based on their larger teaching purpose: both the content understanding they want students to develop and the grade-level literacy standards students need to master. Their questions require students to search for explicit and implicit evidence to support their thinking. Teachers include questions that require higher-order thinking (e.g., analysis, evaluation), not just fact-finding.

B. Supporting All Students to Succeed as Readers[3]

1. Teachers in all subject areas and at all grade levels teach reading to acquire content and to develop skills such as analyzing, evaluating, researching, and writing.
2. In primary grades, teachers balance content-based literacy and structured phonics lessons.
    a. Teachers conduct close read-alouds of content-rich texts using listening and sharing protocols that support students in analyzing and discussing complex text.
    b. Teachers build students' foundational skills by intentionally using texts that support students to understand how language works. Foundational skills include:
        i. Concepts of print
        ii. Phonemic awareness
        iii. Word recognition
        iv. Fluency
        v. Basic conventions of spoken and written English
    c. Teachers make time for active literacy blocks that encourage young readers to play and create with language, explore new skills, read books they choose and can read at an independent level, and practice skills and Habits of Character.
3. In content areas and secondary classes, teachers give special attention to the research standards at their grade level.
    a. Teachers engage students in rich and rigorous evidence-based conversations about the texts they use for their research.
    b. Teachers require students to use the information and evidence they collect in research to support their ideas and arguments in speaking and writing.
4. All teachers regularly facilitate close reading lessons, in which students read and reread short complex texts to uncover layers of meaning and consider author's craft. In primary grades, teachers do this through close read-alouds.
5. Teachers require students to grapple with complex texts as independently as possible; teachers model to clarify and reteach after students have tried on their own.
6. Teachers require students to code or annotate text, refer to the text to answer questions, discuss using evidence from the text, and write to demonstrate their understanding.
7. Teachers use protocols (e.g., Socratic Seminar, Conversation Cafe, Say Something) to structure students' discussion of text, engage all students, and hold them accountable for respectful and productive conversation.
8. Teachers provide tools (graphic organizers, anchor charts, reading response journals, word walls) that enable students to record text-based evidence, document their thinking, and reference vocabulary.
9. Teachers use common language, grounded in the language of the standards, to teach reading (e.g., citing evidence, inferring, identifying main ideas) and habits that support successful reading (rereading, annotating).
10. Teachers explicitly teach students to analyze texts for both meaning and author's craft.
11. Teachers teach vocabulary both implicitly (by immersing students in rich language) and explicitly. They focus lessons intensely on word-learning strategies (e.g., using context clues, affixes, reference materials) to build students' ability to acquire more words independently.

C. Creating a Culture of Reading

1. Teachers present themselves as readers and model appreciation and enjoyment of written text. Adults in the school and larger community read with students and discuss their own reading habits and passions.
2. Teachers frame complex text as an exciting challenge that rewards readers with a sense of achievement and pride, an adventure that demands courage, perseverance, and learnable skills. Teachers encourage students to take academic risks in their reading and provide multiple low-stakes opportunities to learn from mistakes. (See also *Core Practice 22: Fostering Habits of Character.*)
3. Teachers provide opportunities for students to read every day, throughout the day, for a variety of purposes and to discuss and write about what they read. Teachers encourage students to share verbally, to listen respectfully to other readers, and to value multiple perspectives.
4. Teachers celebrate vocabulary, both general academic and domain-specific vocabulary, across the school in lessons, Crew, and displays.
5. Teachers model and verbalize that reading can be joyful and interesting. They set up structures for accountable, independent reading that promote reading as a way to learn about the world and connect with other readers and writers.

3. See also *Core Practice 19: Differentiating Instruction.*

6. Teachers incorporate readings of quotes, short stories, poems, and other short texts into Crew and other schoolwide structures, such as community meetings, to underscore the importance of literacy.
7. Teachers know their students as readers and help students find texts that match individual needs and interests, are accessible and engaging, and that help students build deep knowledge about the world around them.
8. Teachers create classrooms that are print-rich environments with classroom libraries and digital resources that include a variety of sources in multiple genres, representing differing perspectives and a variety of reading levels.
9. Students can articulate the value of reading in their lives and in the world. They read with curiosity, wonder, and joy.
10. Students develop the habits of building strong content knowledge, comprehending as well as critiquing, valuing evidence, and understanding multiple perspectives and cultures.

D. Assessing Reading[4]

1. Teachers provide recording forms, graphic organizers, or reading response journals. Students document their understanding and thinking and provide evidence of growth over time.
2. Teachers regularly confer with students about the content of their reading to deepen students' thinking about their reading, reflect on their growth as readers, and help them set and track goals.
3. Teachers assess student understanding of text through text-dependent questions with verbal or short written responses. Whether oral or written, such questions require students to substantiate their claims and interpretations with evidence from the text.
4. Teachers craft assessments to determine students' level of standards-aligned reading proficiency. In the primary grades, teachers regularly assess students' progress through observation, running records, or age-appropriate literacy assessments.
5. Teachers use diagnostic and normed interim assessment data to identify areas for growth and inform reading instruction. Teaching teams meet regularly to discuss concerns arising from data.
6. Teachers share data with students and support them in analyzing their own data and setting goals for improvement in reading.

4. See also *Core Practice 29: Checking for Understanding in Daily Instruction* and *Core Practice 30: Using Assessments to Boost Student Achievement*

Core Practice 14

Teaching Writing across the Disciplines

In the EL Education model, writing is taught across the curriculum in K–12 classrooms. Teachers provide many opportunities for students to write for multiple purposes: to express their thoughts and feelings, to tell stories, to demonstrate understanding, to reflect on learning, to communicate ideas, and to develop and polish the craft of writing. Students write to learn (as a way of putting their emerging thinking on paper). They also learn to write, revise, and polish authentic pieces in varied genres for audiences beyond the teacher. Teachers develop and teach a common language for the process of writing and the elements of good writing. They use consistent practices for teaching and assessing writing.

At the secondary level, teachers of mathematics, science, history, technology, and the arts explicitly teach and support quality writing within their discipline. Teachers provide opportunities for students to write like historians, scientists, mathematicians, and artists. While the nature and amount of writing varies by discipline and grade level, writing is a central vehicle for learning and communicating in all classrooms.

A. Planning for Writing Instruction

1. Teachers design writing tasks that address standards-aligned learning targets. In the course of the school year, tasks encompass a variety of writing genres and formats (e.g., arguments or opinion pieces supported by evidence, research-based informational writing, narratives, poetry, personal essays).
2. Teachers plan writing tasks that support learning throughout a project, case study, or learning expedition so that students build knowledge and can create a final product with deep understanding about their topic. Teachers create graphic organizers, journals, or other note-catchers to accompany reading lessons. Teachers create on-demand written response tasks to assess students' knowledge and writing skills prior to completing a final product.
3. Teachers identify authentic audiences within and beyond the school community for whom students can write. They design writing tasks for products that will be revised and polished over many weeks and that mirror formats or genres used in the professional world (e.g., brochures, letters, books, how-to manuals, advertisements).
4. Teachers are aware of the writing formats commonly used in different disciplines (e.g., scientific journals, oral histories, mathematical solutions that explain process). They collect and archive exemplars of high-quality student writing in formats used commonly in their classrooms to use as models for class critique lessons and can explain what quality writing looks like in multiple contexts.
5. Teachers craft thoughtfully scaffolded writing lessons to support all learners in a variety of writing tasks and with a particular writing task. They design anchor charts, writing process trackers, rubrics, and other tools to scaffold the writing process for students.
6. Teachers work to include diverse authors who expose students to a variety of cultures and voices when choosing professionally written models for students to learn from and emulate.

B. Supporting All Students to Write Effectively

1. Teachers ensure that students have multiple opportunities to discuss and rethink their ideas before and during a writing task.
2. Teachers recognize speaking and listening as ways of processing and organizing ideas for writing.
3. Teachers encourage students to return to the text multiple times and challenge students to use accurate text-based evidence when writing for evidence-based tasks.
4. Teachers in all subject areas require students to write to learn.
   a. Teachers ask students to read, analyze, discuss, and write about texts in order to evaluate and synthesize evidence they will use in their writing.
   b. Teachers assign journals, synthesis statements, and other forms of written response in which students document their learning about the topic.
   c. Teachers require students to use information and evidence they collect through reading and research to support the ideas and arguments in authentic writing products.
5. Teachers in all subject areas require students to learn to write.
   a. Teachers explicitly teach the recursive process of writing, from building knowledge to prewriting, drafting, conferring, revising (for author's craft), editing (for conventions), and making the work public. They

support students to understand that writers often go back and forth between these "steps" many times.

b. Students articulate and use the writing process to create high-quality work that is complex, well crafted, and authentic. In the primary grades, this means teachers support students with getting their words down on paper but are careful to honor students' word choice and organization of ideas. (See also *Core Practice 12: Planning for and Supporting High-Quality Student Work.*)

6. Students and teachers use a common language for the elements of writing (e.g., ideas, organization, style, sentence fluency, conventions) and the habits that support successful writing (e.g., perseverance, revising, critiquing, editing).

7. Teachers build understanding of the writing process and author's craft through structured critique lessons that feature student work as models whenever possible. These models are not used as examples of perfection, but rather they are analyzed together with students to build student-friendly criteria for quality that can be used to create rubrics and guide students. (See also *Core Practice 12: Planning for and Supporting High-Quality Student Work.*)

8. Teachers create anchor charts with students that document student understanding of the elements of quality writing and the writing process. They are displayed so that students can reference them while they are working toward quality writing.

9. Teachers focus on one skill or strategy at a time (e.g., crafting a thesis, proper citation style). They chunk specific standards, techniques, and elements of writing with targeted mini lessons.

10. In the content areas, teachers explicitly teach writing with attention to the vocabulary, writing formats, and style of their discipline (e.g., lab reports in science class, constructed responses in mathematics class).

11. Teachers explicitly teach the skills students need to compare, contrast, and apply information they gather from text, including analyzing an argument, summarizing information, and attributing quotes accurately.

12. Teachers explicitly teach students how to gather relevant information from multiple print and digital sources and how to evaluate sources for reliability, credibility, and accuracy.

13. Teachers provide feedback on drafts and revisions to individual students to improve students' writing and understanding of what quality looks like and sounds like in their own writing.

14. Teachers use peer critique protocols to teach students how to give and receive kind, specific, and helpful feedback on writing. Students use the rubric or criteria list to provide effective descriptive feedback.

15. Teachers provide contextualized, explicit grammar and conventions instruction tied to the demands of a specific writing task.

16. Teachers differentiate scaffolding for the writing process to support writers in making progress toward high-quality writing products. This may include using different graphic organizers, providing writing technology or tiered assignments, or other ways of differentiating for diverse writers' needs. (See also *Core Practice 19: Differentiating Instruction.*)

C. Creating a Culture of Writing

1. Teachers present themselves as writers and model appreciation and enjoyment of writing for communication and pleasure. Adults in the school and larger community are invited to write with students and to discuss their own writing habits and passions.

2. Teachers frame writing as an exciting challenge that rewards writers with a sense of achievement and pride, and as an adventure that demands courage, perseverance, and skill. Teachers encourage students to take academic risks in their writing and provide multiple low-stakes opportunities to learn from mistakes. (See also *Core Practice 22: Fostering Habits of Character.*)

3. Teachers create classroom environments where students can express their thinking, viewpoints, and creativity in writing. They encourage students to share what they write, to listen respectfully to other writers, and to value multiple perspectives.

4. Teachers and school leaders celebrate strong writing and strong growth in writing throughout the school by displaying and calling out exemplars of student writing.

5. Teachers raise students' awareness of an author's craft when reading across the disciplines. They teach students to read for author's craft and to write with the reader's expectations in mind.

6. Teachers know their students as writers and help them find writing models that match individual needs and interests and inspire students to try new techniques, styles, and formats.

7. Students can articulate the value of writing in their lives and in the world. They develop the habits of valuing evidence, responding to the demands of purpose and audience, using communication strategies

effectively, analyzing multiple perspectives, and writing independently.

D. Assessing Writing

1. Teachers regularly confer with students and encourage them to reflect on their own choices and strategies as authors. Students self-assess and revise based on feedback from teachers and peers. They can articulate how their revisions create more effective writing.
2. Teachers debrief writing workshops to deepen students' thinking about their writing process and encourage students to reflect on their own growth as writers.
3. Teachers assess written communication skills through short tasks (e.g., sentence or paragraph writing, outlines) and longer written assignments.
4. Teachers use classroom or school-based assessments and standardized state or national writing assessments to assess students' level of standards-aligned writing proficiency.
5. Teachers look closely at completed student work to assess students' ability to write for a variety of purposes, audiences, and genres.
6. Teachers use writing assessment data to identify areas for growth and to inform writing instruction. Teaching teams meet regularly to discuss concerns arising from data.
7. Teachers use rubrics based on standards and student-generated criteria to assess and provide feedback on writing during the process and to assess revised writing products.
8. Teachers and students document growth in writing over time, as well as students' reflections on that growth, in student portfolios.

Core Practice 15

Teaching Mathematics

In the EL Education model, mathematics is taught in stand-alone mathematics classes. Whenever possible, it is also integrated into other subjects, projects, case studies, and learning expeditions. Teachers in all disciplines and grade levels model mathematical passion and courage by addressing gaps in their own mathematical understanding, explicitly exploring the mathematical dimensions of their discipline and modeling mathematical thinking. Teachers support all students to think like mathematicians and cultivate mathematical habits of mind, including curiosity, risk-taking, perseverance, valuing evidence, precision, and craftsmanship. All students are prepared to engage in high-level mathematics classes, because such classes often function as gateways to access other classes and courses at the secondary level and in college. Mathematical thinking and learning is showcased and discussed throughout the building.

Teachers choose challenging curriculum and generative problems that will enable students to discover the mathematical concepts behind algorithms and procedures. They engage students by asking them to grapple with complex problems independently and to discuss and critique each other's strategies. Students learn to reason abstractly and quantitatively, to model real-world situations mathematically, and to construct and critique mathematical arguments. Teachers deepen students' conceptual understanding by equipping them to solve unfamiliar and complex problems. Deep conceptual understanding leads to mathematical fluency in which students are able to apply numeracy in various, more complex contexts. Teachers support students to build on foundational facts—vocabulary, algorithms, formulas, and number facts (such as times tables)—as one part of mathematical fluency. Students learn to use technology strategically in problem solving.

A. Planning for Mathematics Instruction

1. Teachers invest time and effort to collaboratively unpack mathematics standards both vertically and horizontally, prioritize and cluster them, and match the mathematical concepts in the standards to challenging and, often, real-world problems.
2. Teachers choose problems that invite multiple problem-solving strategies, representations, and/or solutions and that generate understanding of key mathematical concepts.
3. Teachers test-drive problems to analyze how students might solve them and to anticipate misconceptions and opportunities for instruction.
4. Teachers preplan questions aligned to problems and tasks to promote student discourse of key ideas.
5. Teachers craft learning targets that focus on the key mathematical concept or skill of the lesson in student-friendly language. (See also *Core Practice 28: Crafting and Using Learning Targets.*)
6. Teachers identify both formative and summative assessments that measure progress toward learning targets. These may include class work, math journals, mathematics discussions, and exit tickets in addition to traditional exams and quizzes.
7. Teachers design lessons that require students to grapple independently and collaboratively, participate in mathematical discourse, apply mathematical concepts, and synthesize their learning to connect new understandings to the broader field of mathematics.

B. Teaching Conceptual Understanding

1. Teachers invite students to discover big mathematical ideas by grappling with and solving problems. They use purposeful questions to assess and advance students' reasoning about ideas.. This builds mathematical courage, creativity, and confidence.
2. Teachers often begin a lesson with a problem or problem set that inspires inquiry and encourages grappling. Students return to the grapple problem throughout the class period or over more than one class period.
3. Teachers use lessons structures and routines, such as Workshop 2.0, that allow students to spend the majority of class time applying their learning and developing conceptual understanding. (See also *Core Practice 11: Delivering Effective Lessons.*)
4. Teachers animate standard curricula and resources with engaging, real-world examples and rich tasks with multiple entry points. They use mathematical modeling to connect mathematics to other disciplines. Students and teachers use diagrams, manipulatives, and models to support the translation from concrete to abstract representations and vice versa.

5. Teachers foster rich mathematical discourse in the classroom by asking open-ended questions, showcasing students' own thinking and arguments about mathematics, and teaching the vocabulary of the discipline.
6. Teachers model multiple ways of explaining mathematical thinking verbally, symbolically, graphically, and in writing.
7. Teachers provide protocols that allow students to present and critique their own mathematical arguments and those of others.
8. Teachers use a "neutral" response when students are giving answers or explaining their thinking (e.g., "Is that correct?" "Does that make sense?"). This encourages other students to do their own evaluation independent of the teacher.
9. Teachers identify misconceptions and monitor students' work in progress via strategic questions designed to guide students' thinking so that they ultimately arrive at precise and deep understanding.

C. Teaching Foundational Mathematics

1. Teachers build excitement and motivation for students to acquire foundational facts by using the following strategies:
   a. Helping students develop a belief in their own capacity and celebrating their growth in mastering facts
   b. Focusing on problem solving and conceptual understanding so that students develop a need-to-know attitude about foundational facts
   c. Providing many opportunities for students to practice specific foundational mathematics (e.g., number facts, algorithms, formulas, and vocabulary) required by standards so that students see how fluency empowers their mathematical thinking
   d. Using and discussing strategies and graphic representations that demonstrate patterns, relationships, and shortcuts
   e. Asking students to set goals related to learning targets for foundational mathematics and monitoring progress toward targets with individualized charts, interim assessments, and/or math journals
2. Teachers and leaders provide extended in-school opportunities, mathematics labs, small group interventions, and tutorials for students who need extra support in learning foundational mathematics skills.
3. Teachers teach students to strategically use technology tools, not as a substitute for learning foundational facts, but to enhance conceptual understanding and problem-solving dexterity.

D. Teaching Problem-Solving Skills

1. Teachers promote flexibility in mathematical thinking by celebrating diverse thinking and multiple-solution strategies.
   a. Students are supported to move from concrete to more abstract problem-solving strategies.
   b. Students have opportunities to problem-solve before being taught standard algorithms.
   c. Students explore alternative algorithms, strategies, and shortcuts with the goal of choosing the most efficient strategies for a specific context.
2. Teachers facilitate frequent class discussion and analysis of problem-solving approaches. They provide problem-solving frameworks that can be used to approach both familiar and unfamiliar problems.
3. Teachers regularly ask students to create as well as solve mathematical problems.
4. Teachers ask students to construct viable arguments for solutions and justify their reasoning with evidence including calculations, mathematical stories, graphs, and diagrams.
5. Teachers support students to be precise and craft accurate, efficient, and elegant mathematical solutions.

E. Creating a Culture of Mathematical Literacy

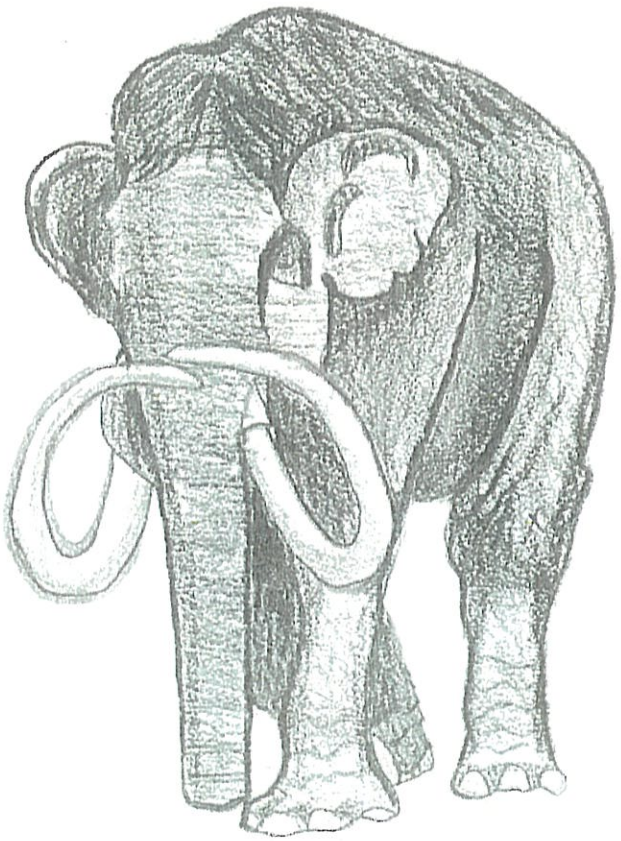
1. Teachers explore their own perceptions and mindsets regarding mathematics. They support each other's ongoing learning as mathematicians.
2. Teachers continually refresh and expand their own mathematical content knowledge, individually and collectively, through professional learning.
3. Teachers learn mathematics instructional techniques and discuss teaching strategies and interventions appropriate for specific student needs.
4. Teachers empower all students to see themselves as mathematicians, refuting stereotypes about who can succeed in mathematics and celebrating the past and current mathematical contributions of diverse individuals and groups.
5. Teachers emphasize the habits of mathematical thinking and create protocols and norms for mathematical discourse. They focus on growth mindset and reinforce students' mathematical courage to speak up in class, risk mistakes, explain their thinking, and persist in challenging problems.
6. Teachers celebrate the mathematical thinking and growth of students by displaying anchor charts and examples of student work to demonstrate students' mathematical literacy.

Teaching Mathematics (continued)

7. Teachers across content areas invite students to apply numeracy beyond mathematics class (e.g., learning expeditions or other core content areas, Crew, community meetings, service-learning work) to reinforce and develop foundational facts and number sense and to model mathematical application. Students are involved in mathematics every day in dedicated classes and outside of mathematics class.

F. Assessing Mathematics

1. Teachers and students use multiple methods for assessing mathematical understanding, such as observations, learning logs, math journals, portfolio reflections, and mathematical models built by students, as well as quizzes, tests, and performance assessments.
2. Teachers regularly and effectively use student-engaged assessment strategies during lessons. They ensure that all students have multiple opportunities to learn and demonstrate progress toward learning targets.
3. Teachers track mathematical discourse as one means of judging collective and individual student understanding.
4. Teachers debrief whole-class mathematical discourse to help students synthesize their mathematical thinking and reflect on their growth as mathematicians.
5. Teachers support students in regularly analyzing data from assessments to understand specific areas and general patterns of strength and weakness. (See also *Core Practice 29: Checking for Understanding in Daily Instruction.*)
6. Teachers regularly analyze data from student work and from formative and summative assessments to identify areas of need and inform instruction.



Core Practice 16

Teaching Science

In the EL Education model, teachers prioritize students' understanding of enduring science concepts so that they can apply that understanding to the modern world. Teachers view science as a way to develop students' capacity to interpret the natural world critically and to engage productively in it. Teachers support students to read, write, think, and work as scientists do. They use learning expeditions, case studies, projects, problem-based content, collaboration with professional scientists and engineers, and interactive instructional practices to foster inquiry and enable authentic student research. When possible, student research contributes to the school or broader community.

Teachers reinforce the connections among science, mathematics, engineering, and technology as they lift up enduring ideas that cut across these disciplines. They cultivate scientific thinking and disciplinary skills in close reading, questioning, experimenting, using data, and communicating scientifically. Students learn to be logical, accurate, insightful, and unbiased when supporting statements with reliable scientific evidence. In addition, because appreciation and stewardship of the natural world is part of the EL Education model, teachers address environmental literacy as part of the science curriculum at all levels.

A. Planning for Science Instruction

1. Teachers unpack and bundle science standards to focus on significant and enduring ideas that cut across science disciplines (e.g., cause and effect, systems and systems models, structure and function).
2. In collaboration with colleagues, teachers plan the year's science scope and sequence to "cover" the broad scope of topics required by standards—a survey approach—and also to "uncover" key concepts through a case study (or deep dive) approach (e.g., a case study of ants within a broader study of animal groups and classification). Long-term planning entails the following:
    a. Crafting standards-aligned learning targets for knowledge, skills, and scientific thinking (e.g., questioning)
    b. Creating engaging lessons that provide a broad overview (e.g., cellular structures in biology)
    c. Selecting case studies or narrow topics that illuminate enduring concepts (e.g., a local frog as a study of indicator species and ecosystem relationships)
3. Teachers choose scientific topics as the basis of learning expeditions, case studies, and projects at all grade levels. They identify controversial scientific issues or local connections that animate topics and have strong potential for original research.
4. Teachers design research opportunities and products that engage students in authentic research that contributes to their communities (e.g., kindergartners analyzing conditions for optimal growth in their school garden, high school students testing indoor air quality in the school to inform recommendations to the board of education).
5. Teachers structure opportunities for scientific inquiry that allow students to participate in scientific research and problem solving that approximate adult science, including framing questions, designing methods to answer questions or test hypotheses, determining appropriate timelines and costs, calibrating instruments, conducting trials, writing reports, and presenting and defending results.
6. Teachers select a variety of primary and secondary source materials to supplement or replace textbooks (e.g., trade books, peer-reviewed journal articles, government documents). These texts serve as both anchor texts to bolster students' conceptual understanding and mentor texts to model the structure and style of scientific writing.
7. Teachers supplement texts with rich experiences to support conceptual understanding, including labs, fieldwork, and interaction with experts.
8. Teachers design assessments for lessons that address content knowledge, scientific thinking, and integrity in applying the scientific method.

B. Teaching Scientific Concepts and Skills

1. Teachers use complex scientific text to build students' understanding of scientific content and teach scientific literacy skills through the following actions:
    a. Conducting close reading lessons of informational text (and sometimes fiction) that includes accurate scientific information
    b. Teaching students to comprehend multiple forms of scientific documents, including texts, maps, models, diagrams, charts, graphs, tables, and timelines

   c. Explicitly teaching domain-specific vocabulary related to the topic of study

2. Teachers engage students in complex, problem-based labs and investigations that require students to:
   a. Ask testable scientific questions
   b. Design and/or conduct experiments
   c. Use the tools of science with accuracy, care, and expertise
   d. Collect, represent, analyze, and report data
   e. Interpret results and reflect on methodology
3. Teachers encourage rich scientific discourse in which students evaluate multiple perspectives on a topic, take and defend positions, and consider alternative viewpoints.
4. Teachers require students to construct arguments and make written and verbal claims supported by scientific evidence so that students practice:
   a. Making logical assumptions
   b. Collecting accurate data
   c. Drawing insightful conclusions
   d. Supporting statements with reliable and unbiased scientific evidence
5. Teachers ask students to represent and reflect on their thinking (e.g., develop science notebooks, create analogies, make graphs, create technical drawings, build models).
6. Teachers use both student work samples and professional models (e.g., reports, lab notebooks, informational books, scientific diagrams) to explicitly teach what quality writing in science looks like and sounds like.
7. Teachers sometimes incorporate service-learning projects connected to content.

C. Creating a Culture of Science Inquiry

1. Teachers empower all students to see themselves as scientists by refuting stereotypes about who can succeed in science and celebrating the past and current scientific contributions of diverse individuals and groups.
2. Teachers, students, and school leaders celebrate, display, and discuss the natural and physical world throughout the school.
3. Teachers support student appreciation and stewardship of the natural world through experiences, projects, and service learning.
4. Schools develop indoor and outdoor areas, such as science labs, computer labs, workshops, gardens, and natural areas, to stimulate students' interest in science and technology.
5. Teachers display student work that provides evidence of scientific research and learning in public areas of the school.
6. Teachers welcome curiosity, reward creativity, and encourage thoughtful scientific questioning. They make students' questions visible and create opportunities for students to pursue answers to their own questions.

D. Assessing Scientific Understanding

1. Teachers create opportunities for students to demonstrate their *understanding* (not memorization) of science concepts (e.g., evolutionary adaptation, Newton's laws of physics). Opportunities include explaining concepts accurately to others using graphic representations, models, demonstrations, writing, and peer teaching.
2. Teachers regularly check for understanding and misconceptions. They support students in tracking their own progress toward learning targets and provide feedback that helps students make progress.
3. Teachers debrief learning by inviting students to generalize and apply concepts and procedures to other contexts and problems. They encourage students to reflect on what they learned, how they learned it, and how they can transfer it to new contexts.
4. Teachers and students use multiple methods of assessing understanding, such as one-on-one discussions, observations, Science Talks, science notebooks, portfolio reflections, and student-constructed scientific models, as well as quizzes, tests, and performance assessments.

Core Practice 17

Teaching Social Studies

In the EL Education model, teachers of social studies prioritize students' understanding of enduring concepts so that they can apply that understanding to the modern world. Teachers view social studies as a way to develop students' capacity to interpret their world critically and to engage productively in it. Teachers support students to read, write, think, and work as social scientists do. They use learning expeditions, case studies, projects, problem-based content, collaborating with social science professionals, and interactive instructional practices to foster inquiry and enable authentic student research. When possible, student research contributes to the school community or broader community.

Teachers help students understand the big picture and timeline of history through survey-type lessons but emphasize historical frameworks, trends, and concepts rather than memorization of myriad facts and details. By focusing on big ideas, teachers support students to appreciate and understand diverse cultures and understand connections among ancient and modern cultures. Whenever possible, teachers choose strategic points to step out of survey mode and dive deep into case studies (often on local topics), during which students can engage in research and work as social scientists. Teachers also cultivate historical thinking and disciplinary skills such as close reading, questioning, using data, and communicating as social scientists do.

A. Planning for Social Studies Instruction

1. Teachers unpack and bundle social studies standards to emphasize the enduring themes—or big ideas—of social studies (e.g., the common elements of civilizations; the roles that governments play; the relationship among geography, industry, and culture).
2. In collaboration with colleagues, teachers plan the year's scope and sequence to "cover" the breadth of required standards and put particular events in a broader historical context (a survey approach) and also to "uncover" key concepts through a case study approach (diving deep). Planning entails the following:
    a. Crafting standards-aligned learning targets for knowledge, skills, and historical thinking (e.g., interpreting data)
    b. Creating engaging lessons that provide a broad overview of topics (e.g., surveys of time periods or geographical regions) using timelines and graphic representations to help students comprehend the big picture of historical relationships
    c. Selecting case studies or narrow topics that intertwine history, government, economics, geography, and culture,and illuminate enduring themes (e.g., a case study of Shays' Rebellion that allows students to develop an understanding of challenges in the founding of the United States, as well as the themes of power, authority, and governance)
3. Teachers choose social studies topics as the basis of learning expeditions, case studies, and projects at all grade levels. They identify engaging local issues that animate topics and have strong potential for original research (e.g., a case study of a local civil rights leader embedded in a study of the American civil rights movement).
4. Teachers design research opportunities and products that engage students in authentic research that contributes to their communities (e.g., third-graders writing and advocating for a school constitution; middle school students writing and publishing a book about local peace activists).
5. Teachers structure opportunities for students to do original research or problem solving using professionally recognized social science methods, including framing questions, designing methods to answer questions, determining appropriate timelines and costs, conducting surveys or interviews, writing reports or narratives, and presenting and defending ideas.
6. Teachers select a variety of primary and secondary source materials to supplement or replace textbooks (e.g., trade books, journal articles, government documents). These texts serve as both anchor texts to bolster students' conceptual understanding and mentor texts to model the structure and style of social science writing (e.g., an oral history or white paper).
7. Teachers supplement texts with rich experiences to support conceptual understanding, including visits to cultural sites, fieldwork, and interaction with experts.
8. Teachers design assessments that address content knowledge, historical thinking, and integrity in applying social science methods.

Teaching Social Studies (continued)

B. Teaching Social Studies Concepts and Skills

1. Teachers use complex text to build students' understanding of social studies content and teach literacy skills through the following actions:
   a. Conducting close reading lessons of informational text (and sometimes fiction) related to a social studies topic
   b. Teaching students to comprehend multiple forms of social science documents, including texts, maps, diagrams, charts, graphs, tables, and timelines
   c. Explicitly teaching domain-specific vocabulary related to the topic of study
2. Teachers use a survey approach to teach geography and the broad timelines of history that provide the big picture of social studies.
3. Teachers use a case study approach to dive deep and explore local and/or specific historical questions with depth and complexity.
4. Teachers engage students in complex, problem-based activities, such as investigations based on authentic questions, through the following actions:
   a. Teaching students to use methods approximating those used by professional social scientists (e.g., oral history, surveys, demographic data collection) with accuracy, care, and expertise at all levels
   b. Requiring students to collect, represent, analyze, and report real data as a part of inquiry
5. Teachers ask students to explore multiple perspectives when learning about a topic and to analyze and evaluate evidence for opposing views. This may include exploring the history and evolution of historical thinking, considering such questions as who records history and how is it interpreted.
6. Teachers require students to construct arguments and make verbal and written claims supported by evidence so that students practice:
   a. Making logical assumptions
   b. Drawing insightful conclusions
   c. Supporting claims with unbiased and reliable evidence
7. Teachers ask students to represent and reflect on their thinking (e.g., develop history notebooks, create analogies, make graphs, create technical drawings, build models).
8. Teachers use both student work samples and professional models (e.g., community ethnography, annotated maps, infographics) to explicitly teach what quality writing in social studies looks and sounds like.
9. Teachers sometimes incorporate service-learning projects connected to content.

C. Creating a Culture of Social Studies Inquiry

1. Teachers empower all students to see themselves as historians by refuting stereotypes about who records history and highlighting the past and current historical contributions of diverse individuals and groups.
2. Teachers, students, and school leaders celebrate, display, and discuss culture and society throughout the school. They address issues of diversity and equity that impact students and their communities.
3. Teachers support student appreciation and stewardship of their communities through experiences, projects, and authentic service learning.
4. Teachers and students connect local issues with the broad concepts of social studies. Teachers encourage students to explore specific social issues that impact their lives, to ask questions, and to pursue their own answers within the context of broader social studies questions and topics.
5. Teachers, students, and staff participate in community events that encourage students to make informed and reasoned decisions for the public good as citizens of a culturally diverse, democratic society.
6. Teachers display student work that provides evidence of social science research and learning in public areas of the school.

D. Assessing Social Studies

1. Teachers create opportunities for students to demonstrate understanding of concepts by explaining them accurately to others using graphic representations, models, or demonstrations.
2. Teachers regularly check for understanding and misconceptions. They support students in tracking their own progress toward learning targets and provide feedback that gets students back "on track" toward targets.
3. Teachers debrief learning by inviting students to generalize and apply concepts and procedures to other contexts and problems. They encourage students to reflect on what they learned, how they learned it, and how they can transfer it to new contexts.
4. Teachers use multiple methods of assessment, including one-on-one discussions, interactive notebooks, performances, or products that result from projects, as well as quizzes and tests.

Core Practice 18

Teaching in and through the Arts

In the EL Education model, arts are celebrated as a central aspect of learning and life. Schools teach art as an academic discipline and also in core academic subjects, where it engages students in problem solving, planning, and perseverance. They celebrate the unique capacity of the arts to express truth, beauty, and joy. Student exhibitions of learning feature the arts along with other subjects. Schools are filled with student artwork, which is displayed in a way that honors the work. Artistic performances are points of pride for the school. Arts are often used as a window into disciplinary content in other academic subjects (e.g., ancient Greek architecture as an entry point to ancient Greek civilization, protest songs as a case study when learning about the civil rights movement). The arts also provide opportunities to explore diverse cultures, perspectives, and regions of the world.

The visual and performing arts are taught using the same effective instructional practices that are used in other disciplines, and all students have access to professional artists and professional exhibitions and performances. Ideally, specialists in visual and performance arts are on the school staff. If they are not, classroom teachers use professional art educators and artists whenever possible to support high-caliber artistic learning. Teachers and students analyze professional and student-created work models as the basis for understanding what excellence looks like and sounds like in the particular form. Through critique and revision, students render works of art that demonstrate complexity, craftsmanship, and authenticity.

The arts build school culture and student character by emphasizing risk-taking, creativity, and a quest for beauty and meaning. Teachers invite students to make artistic choices and design opportunities for students to make independent decisions that are purposeful and meaningful. Students work through diverse arts traditions to reshape the arts, the world, and themselves.

A. Planning for Arts Instruction

1. School leaders and teachers identify many opportunities for art instruction, including visual and performing arts classes, as well as art projects conducted in other disciplines. These are aligned with art and disciplinary standards and documented in schoolwide and course curriculum maps.
2. Teachers craft standards-aligned learning targets that address knowledge, skills, and character traits related to the study of art.
3. When selecting case studies or designing projects or learning expeditions in non-art classes, teachers often include art as a focus of study or a product of the learning. When designing curriculum, teachers consider the following questions:
    a. What is the scope and focus of the project? Examples of scope and focus include:
        i. The arts or history of the arts as the primary focus of a learning expedition (e.g., arts in the Harlem Renaissance, in which each case study examines a different artistic genre—jazz, painting, poetry)
        ii. The arts or history of the arts as the subject of a case study within a larger project or learning expedition (e.g., the Ashcan School of painting during a study of the early 20th century)
    b. Does the project and product require students to both learn the techniques of an artistic medium and to represent their understanding through art?
    c. What is the authentic audience for the artistic product? These may include galleries, public performance venues, events, or publications.
4. Teachers select and evaluate texts to support instruction in the arts. These may include photographs, videos (e.g., of dance), or a three-dimensional artwork that can serve as a "text" that students "read" and interpret.
5. Teachers plan lessons with the product or problem in mind and design a process that supports students to create the product or solve the problem. They choose lesson structures and protocols (e.g., Workshop 2.0, critique protocols) that give students opportunities to practice the skills they need to create the artwork or that enable students to analyze the problem, experiment with artistic materials and methods, and create solutions (e.g., discovery-based lessons).

6. Teachers, particularly when not artists themselves, identify experts and fieldwork opportunities that can augment in-class art instruction.
7. Teachers in non-art disciplines and art teachers collaborate to design assessments that address disciplinary concepts, artistic standards, and character targets related to creativity, collaboration, and perseverance.

B. Teaching Artistic Techniques

1. Teachers sequence lessons to support students in building knowledge about the history of the art form as well as skills and techniques required for a particular product. They provide ample time for all students to practice, revise, and polish artistic work.
2. Teachers convey the symbol system and domain-specific vocabulary used in the particular art form they are teaching (e.g., notation in music).
3. Teachers include lessons that focus on character learning targets with special relevance in the arts (e.g., precision, perseverance, practice, or imaginative play).
4. Teachers conduct critique lessons based on student-created or professional models that include:
   a. Developing criteria for excellence in conversation with students that reflect disciplinary standards and unpacking the attributes of quality work: complexity, craftsmanship, and authenticity
   b. Creating rubrics that communicate those criteria to students as the basis for evaluation
5. Teachers provide many opportunities for students to reflect on and self-assess the quality of their work based on feedback. (See also *Core Practice 12: Planning and Supporting High-Quality Student Work.*)
   a. Teachers instruct students how to give and receive feedback on their own and each other's work based on clear expectations and criteria.
   b. Teachers provide feedback on works in progress and on the skills students are practicing in class.
   c. When appropriate, students revise multiple times based on feedback.
6. Teachers design opportunities for student choice and expression. They challenge students to work in established artistic forms and also to put artistic forms to new uses or work with multimodal or interdisciplinary forms.
7. Teachers differentiate supports and offer students flexibility in their approach based on differences in students' needs and interests. Individual students have clear roles and responsibilities for collaborative art products so that they can be assessed individually as well as collectively.
8. Teachers teach the presentation and performance skills needed for displaying or presenting the work to an authentic audience. Student art is often accompanied by artists' statements or reflections so that artistic thinking can be demonstrated to the public and is a part of learning and assessment (e.g., on gallery walls and in programs for musical, movement, or drama performances).

C. Creating a Culture of Art

1. Teachers provide opportunities for all students to learn about and experience the arts through live performances, galleries, and exhibitions and to work in a variety of media.
2. The school celebrates the beauty and power of art in all forms. Arts instruction builds and celebrates students' understanding of culture—students' own culture and others' culture—through art.
   a. The school building is rich with original student artwork, which is curated and displayed in a way that honors the work.
   b. Whenever artistic products or performances are included in learning expeditions or projects, the artistic work is treated with integrity and valued equally with non-artistic products.
   c. Teachers, leaders, students, and families take pride in performances.
   d. Documentation panels of student learning, displayed throughout the school, are strong works of art in themselves.

D. Assessing Art Products

1. Teachers and students value artistic work as academic achievement. Students include artistic work and reflections in portfolios for student-led conferences and passage presentations.
2. Teachers assess final products based on artistic criteria or disciplinary standards and on character learning targets relevant to artistic endeavors, such as creativity, craftsmanship, or perseverance.

Core Practice 19

Differentiating Instruction

In the EL Education model, differentiation is a philosophical belief and an instructional approach through which teachers proactively plan instruction to capitalize on students' varied assets and meet students' varied needs based upon ongoing assessment. Teachers differentiate for students with disabilities, for advanced learners, for English language learners (see also *Core Practice 20: Teaching English Language Learners*), and for students whose differences are not formally evaluated but have been identified through informal learning and interest inventories. In whole group general education instruction, teachers use flexible groupings of students and design respectful tasks that allow for different approaches to the same goals. Teachers build a culture that honors diverse assets and needs and holds all students accountable to the same long-term learning targets, putting equity at the center of the school's commitment and vision. At the same time, general education teachers make accommodations and modifications for students who have identified exceptionalities and collaborate with a team of school professionals to provide additional supports or extensions.

A. Schoolwide Structures to Support Differentiated Instruction

1. School leaders ensure that students with disabilities and advanced learners (together these two groups compose *exceptional learners*) are taught in general education classrooms to the greatest extent possible.
2. School leaders ensure that a continuum of services for exceptional learners is available based on the needs of the student population that is served. These services, to the greatest extent possible, are provided via a push-in delivery model.
3. School leaders ensure that supplemental services that provide for additional support, intervention, or extension are available to students whose needs are not being met via the general education classroom or within the continuum of services for exceptional learners.
4. A multidisciplinary team (e.g., exceptional children's specialists, school counselors, classroom teachers) guides decision-making to serve the needs of exceptional learners and maximize their contributions. These decisions include:
   a. Making sensitive decisions about placement and services that are informed by psychological evaluations and other high-quality assessments, including assessment of students' mastery of knowledge and skills, character, and work samples
   b. Considering the needs of students who fall into multiple need categories (e.g., English language learners who are also advanced learners) and identifying services that meet all needs
   c. Ensuring that all staff are equipped to fully include exceptional children in the school community
   d. Using research-based best practices to support exceptional learners
   e. Providing adequate planning time to collaborative teams who support this student population
   f. Providing all staff with high-quality professional learning related to meeting the needs of exceptional learners
   g. Developing and training effective teams (e.g., Multi-Tier System of Supports) to ensure that students needing supplemental support are identified and that placement in interventions and other programs are made appropriately
5. A multidisciplinary team develops accommodations and modifications with student and family input as a function of the student's Individualized Education Program (IEP). The intention of accommodations and modifications is to achieve the most rigorous outcome in the least restrictive environment possible for the student.
6. Leaders, school counselors, teachers, and exceptional learning specialists consider college and career an option for all students and prepare students with disabilities to seek the best postsecondary option. They teach self-advocacy skills and help students understand their learning challenges, assets, and strengths.

B. Differentiating Instruction

1. School leaders and teachers ensure that to the greatest extent possible, exceptional learners complete the same curriculum and meet the same learning targets as their classmates in the general education classroom with same-age peers.
2. Teachers of exceptional learners and general education teachers collaborate to plan and deliver differentiated instruction for exceptional learners that meet IEP goals. They determine student needs and readiness through use of multiple assessment strategies (e.g.,

pre-assessments, student self-assessments, inventories, providing multiple opportunities for success).

3. Teachers in general education classrooms employ flexible grouping that is:
   a. Informed by multiple and ongoing assessment instead of stagnant ability grouping (i.e., tracking)
   b. Grouped heterogeneously or homogeneously depending on the purpose of the lesson and the task students are given (e.g., a task that calls for collaboration between diverse perspectives likely calls for heterogeneous groups; a mathematics lesson in which some students need additional or different guided instruction and others need a more complex challenge may require homogeneous groupings)
4. Teachers select materials so that all students read high-quality literature and complex informational text appropriate for grade-level standards (unless an IEP dictates otherwise).
   a. For students with reading disabilities or specific learning disabilities that impact reading, differentiated texts are used strategically rather than as a permanent substitute for grade-level texts.
   b. All students also have access to texts that respond to their interests and academic readiness.
5. Teachers strategically work with small groups to build content knowledge, context, or skills in advance of whole group instruction when this strategy enhances students' ability to enter the whole group lesson.
6. Teachers provide multiple pathways for meeting the learning targets based on student readiness (e.g., allowing more time for students with disabilities to practice or providing a more complex grapple problem for advanced learners).
7. Teachers provide supplemental or differentiated materials so that students with disabilities can fully participate in the learning (e.g., visual cues, graphic organizers, smaller chunks of complex text, vocabulary guides).
8. Teachers provide opportunities for all students to participate in all aspects of the curriculum and interact with their peers to develop compassion and empathy.
9. Teachers are intentional about selecting diverse texts that build in and build on student interests, backgrounds, and choices. They are sensitive to cultural differences and backgrounds.
10. Teachers design lessons to ensure that all students have access to the background knowledge, vocabulary, grammar, and academic language needed to succeed.

C. Creating a Culture for Differentiated Instruction

1. Leaders and teachers verbalize and model a commitment to equity and diversity within the school by doing the following:
   a. Celebrating diversity and practicing inclusion in school events and traditions (e.g., providing accommodations so that students with disabilities can participate in fieldwork)
   b. Ensuring that all students have access and are exposed to cultural and social opportunities (e.g., libraries, museums, universities)
   c. Honoring the best work of all students, not just students whose work is exemplary
   d. Teaching lessons that help students understand the diversity of students at their school
   e. Learning about the home, cultural, and community backgrounds of their students
   f. Sharing their own home, cultural, and community background with students when this is in the service of creating an inclusive classroom community
2. Teachers track patterns of student participation in classroom discussions and teacher/student interaction. They use these data to adjust instruction to ensure equitable participation and interaction.
3. Leaders track patterns of family participation in decision-making about exceptional learners. They use these data to adjust school procedures, structures, and policies to ensure equitable participation and interaction.

Core Practice 20

Teaching English Language Learners

The EL Education model recognizes that all speakers of English, at whatever level of proficiency, are constantly learning English. Some learners of English are acquiring it as a second, third, or fourth language, and rather than viewing bi- or multilingualism as a problem to be solved, leaders and teachers create a school and classroom culture to optimize it as an asset.

Teachers of English language learners (ELLs) assess students' understanding of English and school background in order to differentiate appropriately for the diversity of ELLs. In all subject areas, they use instructional approaches (e.g., Language Dives, Conversation Cues) that immerse ELLs in rich classroom discourse and support language acquisition as well as knowledge and skills development. They strive to assess ELLs' knowledge and skills separately from their language skills. They value language diversity and honor students' home languages and cultures by creating opportunities for ELLs and language-minority students to teach their peers and take pride in their languages and cultures.

A. Schoolwide Structures to Support English Language Learners

1. While ELLs are learning English, they have a wide variety of school backgrounds, reading abilities (in their home language and in English), and social and emotional skills based on diverse experiences. Therefore, leaders and teachers establish policies to ensure that ELLs are taught in regular education, heterogeneous classrooms to the greatest extent possible.
2. Leaders ensure that the school offers a continuum of services (both co-taught and small group instruction) to strategically support ELLs. When needed, leaders also ensure supplemental services, such as translators and newcomer support.
3. Leaders and teachers communicate with families and students in ways that reflect students' linguistic needs.
4. Leaders' and teachers' decisions about placement and programs for ELLs are based on researched high-quality assessments and consultation with families. A multi-disciplinary team considers the needs of students who fall into multiple need categories (e.g., ELLs who are also advanced learners).
5. School leaders and ELL teachers ensure that all staff members are equipped to fully include multilingual students in the school community, both meeting these students' needs and maximizing their contributions.
    a. School leaders, general education teachers, and ELL teachers use research-based best practices to support second-language acquisition.
    b. Collaborative teams that work with ELLs are provided with adequate planning time to support this student population.
    c. School leaders and learning specialists provide all staff with high-quality professional learning related to meeting the needs of English language learners.
6. Leaders and teachers advocate for district and other standardized assessments to be fair and unbiased toward ELLs.

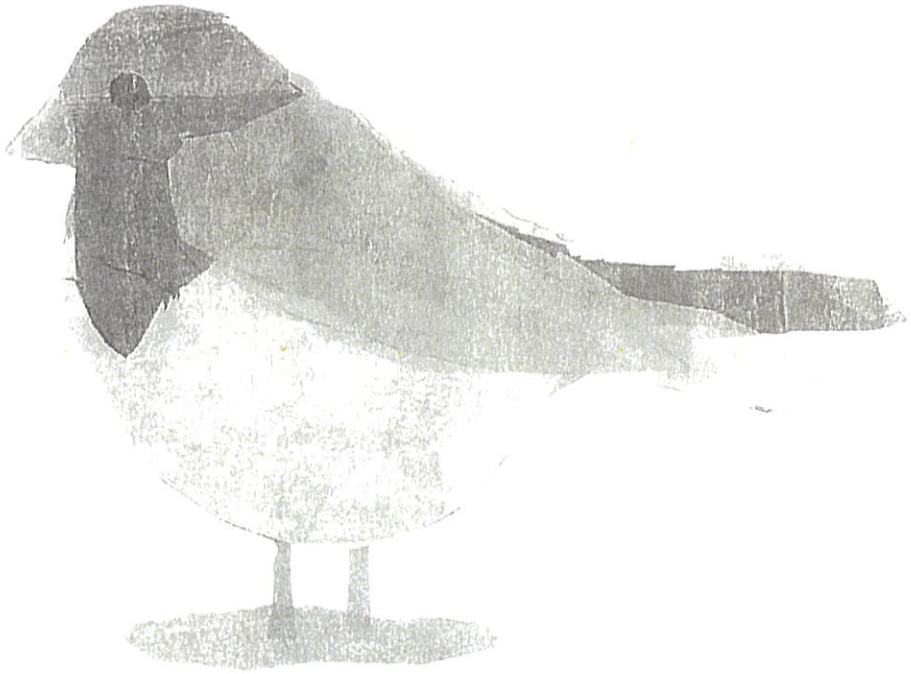
B. Teaching English Language Learners

1. In general education classes, ELLs work toward the same learning targets as their peers.
    a. Students work on the same final product, but teachers differentiate supports for getting to the product (e.g., as ELLs compose a letter to the editor, they may use sentence frames to shape the expression of their thoughts).
    b. ELL teachers collaborate with general education teachers to plan and deliver differentiated instruction for English language learners based on the range of language proficiency levels. They write additional learning targets for ELLs that address language development (e.g., "I can contrast my position with another using comparative adjectives").
    c. Teachers determine student needs and readiness through use of multiple assessment strategies (e.g., pre-assessments, student self-assessments, inventories, providing multiple opportunities for success). They recognize that ELLs may be strong in one subject area and not in another.
2. General education teachers include ELLs in heterogeneous groupings or flexible groupings based on their readiness for the skill or content being taught. Sometimes it may be appropriate to group ELLs together for differentiated instruction, such as for an additional Language Dive.

3. Teachers use compelling and challenging instructional materials. They provide supplemental materials so that ELLs can access content (e.g., conversations about the language and meaning of complex text, visual cues, materials written in the student's home language, vocabulary guides, culturally relevant materials).
4. Teachers use protocols and Conversation Cues to engage ELLs in the complex oral conversation of classroom discourse. Conversation Cues encourage students to:
   a. Talk and be understood (e.g., "Can you say more about that?")
   b. Listen carefully to one another and seek to understand (e.g., "Who can repeat what your classmate said?")
   c. Deepen their thinking (e.g., "Why do you think that?")
   d. Think with others to expand conversation (e.g., "Who can add on to what your classmate said?")
5. Teachers guide students to notice and think about how language is used by conducting Language Dives, brief structured conversations in which students analyze and practice complex sentences, grammatical structures, collocations, and idiomatic expressions in context. Language Dives may involve the whole class or only ELLs.
6. Teachers track global, pervasive, or stigmatizing errors and give students measured feedback that addresses errors. Equally, they praise students' efforts as a sign of beneficial risk-taking and growth.
7. Teachers give students ample writing practice so that they become familiar with writing expectations and have multiple opportunities to construct sentences and paragraphs in English as well as in conversation.
8. Teachers help students learn and practice vocabulary within the context of the topic they are teaching and the text they are using. They discuss and practice using common academic phrases.
9. When designing assessments of content knowledge or skill, teachers work to separate mastery from the ability to express that mastery in English.

C. Creating a Culture for English Language Learning

1. Leaders and teachers honor students' home languages and cultures through the school's environment, communications, and organizational structures.
   a. Members of the school community celebrate diversity and practice inclusion in school events and traditions. They celebrate not only ethnically different holidays, but also the values, beliefs, approaches, and interactions of multicultural students.
   b. Leaders and teachers ensure that school signage and other critical communications to students and families are accessible to ELLs and their families.
   c. Leaders make sure that the front office staff is trained and equipped to connect and reach out to multicultural families. This includes practices such as calling home in the preferred language and identifying people at the school who speak various languages and can be available to translate at meetings and conferences.
2. Leaders provide multiple ways for families of ELLs to engage with the school, including serving on decision-making committees, actively participating in classrooms as experts, and assisting with schoolwide events.
3. Teachers learn about the home, cultural, and community backgrounds of their students. They may share their own home, cultural, and community background with students in the service of creating an inclusive classroom community.
4. Teachers honor students' home language learning in tandem with English. They encourage families to help their children develop literacy and other complex academic uses of their home language.
5. Teachers learn words and phrases in their students' home languages and publicly honor multilingualism by posting words and phrases in anchor charts or other visuals in the classroom.
6. Crew leaders teach lessons that focus on understanding the diversity of languages that are spoken in their school, just as they support understanding of other forms of diversity.

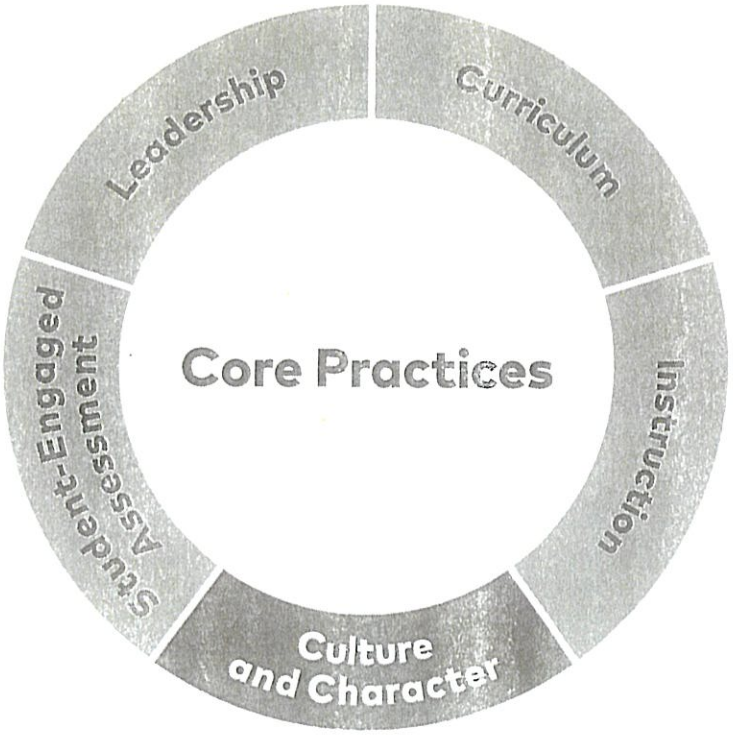


Culture and Character

The EL Education model fosters and celebrates students' character development by building a culture in which students and staff work together to become effective learners and ethical people who contribute to a better world. Schools establish Habits of Character—qualities like respect, responsibility, courage, and kindness—and model and discuss them every day. The school is suffused by a spirit of Crew: students and staff work together as a team to sustain a learning community where everyone belongs and can succeed.

Core Practices in This Domain

- Creating a Community of Learning
- Fostering Habits of Character
- Building the Culture and Structure of Crew
- Engaging Families and the Community in the Life of the School
- Creating Beautiful Spaces That Promote Learning
- Promoting Courage and Adventure



Core Practice 21

Creating a Community of Learning

The EL Education model fosters and celebrates students' academic growth and character development as inseparable. Members of the school community live up to the spirit of EL Education's Design Principles on a daily basis and create a school climate characterized by physical and emotional safety, joy in learning, kindness, and positive leadership. All adults in the school communicate clear expectations for student character based on the school's Habits of Character and model those values in their own practice and interactions. Policies and practices encourage students to become effective learners and ethical people who contribute to a better world. This means leaders, teachers, and students value diversity and work to create a community that is equitable, inclusive, and committed to social justice.

A. Setting Clear Schoolwide Expectations

1. School leaders, teachers, and students adopt Habits of Character to which all students and staff members aspire. When choosing and naming the Habits of Character (e.g., respect, responsibility, perseverance, courage, compassion), leaders and teachers:
   a. Prioritize social and emotional learning equally with academic learning
   b. Choose habits that support students to become effective learners, ethical people, and contributors to a better world
2. The school adopts a subset of Habits of Character connected to becoming effective learners, called Habits of Scholarship or Habits of Work (e.g., I come to class prepared; I participate actively in class; I complete my homework; I collaborate with classmates). These habits are assessed and reported separately from academic learning targets. (See also *Core Practice 22: Fostering Habits of Character.*)
3. Leaders and teachers establish practices that develop student accountability for and celebrate Habits of Character, including the following actions:
   a. Leaders and teachers make Habits of Character visible across the school. They frequently discuss Habits of Character with staff and students and incorporate them into the fabric of school life, such as daily Crew meetings.
   b. All members of the school community hold themselves and each other accountable for upholding the Habits of Character.
   c. Students reflect on Habits of Character and share their progress in student led-conferences and passage portfolios.
   d. Leaders and teachers recognize character in school awards, community circles, and other public acknowledgments.
   e. Leaders and teachers use the Habits of Character as the foundation of a positive approach to discipline and restorative justice.
4. Teachers partner with students to translate Habits of Character into specific behaviors called norms (e.g., leave no trace, embrace challenge as an opportunity, speak and act with compassion). Norms may be specific to a classroom, setting, or event and also may include general schoolwide norms. Teachers ensure that students agree upon norms in which Habits of Character can flourish.
5. Leaders and teachers explicitly model, teach, and refer to the Habits of Character in classrooms and throughout the school (in the lunchroom, halls, recess, before and after school).
   a. Leaders and teachers use the school's common language for Habits of Character.
   b. Teachers support students to make connections between Habits of Character and their academic and life success.
   c. Teachers and leaders frequently refer to norms and Habits of Character when praising or redirecting students' behavior.
   d. Leaders and teachers model the Habits of Character with students and in their professional relationships.

B. Fostering a Positive Climate for Learning

1. Leaders and teachers model and reinforce the following academic mindsets:
   a. I belong in this academic community.
   b. My ability and competence grow with my effort.
   c. I can succeed at this.
   d. This work has value for me.
2. Teachers and leaders act as models of lifelong learning for students.

a. When appropriate, teachers discuss their own learning with students.

b. Leaders create dedicated time for teachers' professional learning. They communicate it to families and celebrate it in the school community.

3. Leaders and teachers ensure that all school members are implicitly and explicitly included and supported in the learning community. They show respect and use inclusive behaviors toward students and staff regardless of background or identity.

4. Leaders and teachers manage their nonverbal communication, voice, and emotions in ways that communicate to students that it is OK to seek support for challenges.

5. Leaders and teachers foster student self-management and responsibility for learning through the following actions:

   a. Looking for opportunities to elevate student voice and leadership in the classroom and across the school

   b. Framing redirection in terms of restoration of the learning community (e.g., "When you follow our classroom norm of respecting diverse perspectives, you can rejoin the discussion circle.")

   c. Establishing classroom norms that describe what responsibility for learning, collaborative and compassionate behavior, and positive leadership look like and sound like in the specific context of the classroom

   d. Establishing routines and procedures (e.g., jobs, transition procedures, nonverbal signals, materials organizational systems) that foster student independence and competence

   e. Using established structures, programs, or practices (e.g., restorative circles, peer support) to engage students in determining logical and consistent consequences for student actions that disrupt the learning environment

6. Leaders and teachers treat challenging behaviors as a learning opportunity for both students and teachers.

   a. Leaders and teachers examine discipline policies and practices for hidden biases and work to implement discipline equitably.

   b. Leaders and teachers actively seek to understand causes of challenging behaviors and conflict.

   c. Leaders and teachers understand and discuss with staff and students the concept of growth mindset—the idea that ability is not fixed and that through challenging work and strategic practice, individuals can grow.

   d. Leaders and teachers develop affirming, positive behavior intervention systems to minimize suspensions. They avoid zero tolerance policies that exclude students from the learning environment.

   e. Leaders and teachers address lapses in good character explicitly, respectfully, and well, even if it means, for example, interrupting class work or a staff meeting.

   f. Leaders and teachers identify consequences for challenging behaviors that give students opportunities to own their mistakes, repair harm to individuals and the learning environment, and rejoin the learning community (e.g., restorative circles, peer support or judiciary councils, restitution through service).

   g. Leaders and teachers clearly document and communicate consequences to students, families, and other staff.

C. Building Traditions

1. Leaders and teachers create traditions that celebrate Habits of Character in whole-school settings and in classrooms (e.g., public acknowledgements in community circles, inspirational readings in Crew).

2. Leaders and teachers customize EL Education traditions. They develop the school's own unique traditions that express the school's vision of a positive community that is focused on learning.

3. Students play an active role in maintaining school traditions and acting as leaders (e.g., being ambassadors for visitors, leading meetings, maintaining the building, mentoring younger children, leading morning announcements).

4. Leaders and teachers consider how school spaces and rituals accommodate various traditions and reflect a culture of community, respect, and joy in learning. They ensure that spaces used for school traditions and celebrations are safe and inclusive and communicate the school's values.

Core Practice 22

Fostering Habits of Character

In the EL Education model, students' character development is equally as important as producing high-quality work and mastering knowledge and skills. Throughout their educational journey, students are working to become effective learners, ethical people, and contributors to a better world. Schools adopt Habits of Scholarship, which are a subset of Habits of Character that support students to become effective learners. They articulate Habits of Character that enable students to become ethical people, which include traits like respect, honesty, and compassion. They articulate Habits of Character that enable students to contribute to a better world through service and stewardship.

All three aspects of strong character (becoming effective learners, becoming ethical people, and contributing to a better world) are essential for success in school and in life. In the EL Education model, all learning is character-based. Students are on a mission to do good work: work that is good in quality, good for the soul, and good for the world.

A. Becoming Effective Learners (through Habits of Scholarship)

1. Leaders and teachers adopt a subset of Habits of Character connected to becoming effective learners, called Habits of Scholarship or Habits of Work.
   a. Teachers post Habits of Scholarship in classrooms.
   b. Teachers discuss Habits of Scholarship regularly.
2. Leaders and teachers articulate, in student-friendly language, what Habits of Scholarship look like and sound like. They design rubrics, anchor charts, and other supporting documents that can be easily referenced by teachers, students, and the greater community.
3. Leaders and teachers reference the school's Habits of Scholarship in school structures and documents (e.g., portfolios, school handbooks, transcripts, celebrations of learning).
4. Teachers explicitly plan lessons, experiences, and assessment opportunities (both qualitative and quantitative) that support students in developing their Habits of Scholarship.
   a. Teachers provide many opportunities for students to practice Habits of Scholarship in daily lessons, projects, fieldwork, and Crew.
   b. Teachers intentionally teach behaviors that enable students to develop Habits of Scholarship (e.g., note taking, recording homework, revising, accessing resources independently).
   c. Teachers unpack Habits of Scholarship into a purposeful progression of developmentally appropriate character learning targets (e.g., "I can revise my work to achieve high-quality products"). Students and teachers track students' growth and mastery of these targets.
   d. Teachers name and honor students' Habits of Scholarship to reinforce these behaviors in specific settings.
   e. Teachers create instructional routines and opportunities for reflection on Habits of Scholarship.
5. Students regularly track their progress on Habits of Scholarship and can articulate the link between their Habits of Scholarship and future success in school, career, and life.
6. Teachers assess Habits of Scholarship separately from academic targets.
7. Leaders and teachers publicly celebrate students who exhibit strong or improving Habits of Scholarship.

B. Becoming Ethical People

1. Leaders and teachers include in the school's Habits of Character traits that support students in becoming ethical people (e.g., kindness, honesty, empathy, respect).
2. Leaders and teachers work with students to articulate, in student-friendly language, what working to become an ethical person looks like and sounds like. These descriptions are often embedded in schoolwide and classroom norms.
3. Leaders and teachers model Habits of Character across classrooms and content areas and in professional conversations. A focus on ethical behavior is seen not as time away from learning, but as highly valuable and an investment in student achievement.
4. Leaders and teachers explicitly plan experiences that address Habits of Scholarship for Crew, classrooms, and the school as a whole. They support students in becoming ethical people through the following actions:

a. Providing many opportunities for students to practice empathy, honesty, respect, and compassion in daily lessons, projects, fieldwork, and Crew

b. Supporting students' agency and self-efficacy by encouraging students to become allies and "upstanders" who reject and confront behaviors that disrupt a respectful culture (e.g., bullying, discrimination, name-calling, cliques)

c. Explicitly teaching team-building, conflict resolution, problem solving, and personal communication skills

d. Crafting and using character targets for academic lessons (e.g., "I can listen actively to diverse opinions")

e. Naming and honoring students' ethical behavior to reinforce what it looks like and sounds like in specific settings

5. Students regularly self-assess how they are working to become ethical people. Students document their Habits of Character qualitatively with examples and other evidence in reflections. They can articulate the link between their Habits of Character and their relationships in the community.

6. Leaders and teachers create traditions that honor the culture of respect, honesty, and inclusion. They celebrate teachers and students who treat others with fairness and compassion and stand up for what is right.

C. Contributing to a Better World

1. Leaders and teachers include in the school's Habits of Character traits that support students in contributing to a better world and becoming global citizens. These include valuing diversity and working toward greater equity, inclusion, and social justice.

2. Leaders and teachers work with students to articulate, in student-friendly language, what contributing to a better world looks like and sounds like. These descriptions of civic character are often embedded in schoolwide and classroom norms.

3. Leaders and teachers model civic character through acts of service within and beyond the school.

4. Leaders and teachers collaborate with students to analyze and evaluate school and community structures and traditions and to revise them to create a more diverse, equitable, and inclusive community.

5. Leaders and teachers design curricula that teach civic character and provide students with opportunities to contribute to building a better world.

   a. Teachers focus on local and global issues that invite students to solve real-world problems in case studies, projects, and learning expeditions. Student-created products often contribute something of value for readers, viewers, or listeners (e.g., a student-written oral history of local war veterans). Projects frequently include a service component.

   b. Crew leaders support students to plan and conduct service projects. They provide students with opportunities to make decisions, become leaders, contribute to local and global communities, and build more equitable communities.

   c. Schools offer extracurricular opportunities for students to lead or contribute to service-oriented initiatives.

6. Students document their work and service from classwork, Crew, or extracurricular activities.

7. Leaders and teachers publicly celebrate service, civic engagement, and global citizenship in school traditions, events, and communications.

Core Practice 23

Building the Culture and Structure of Crew

In the EL Education model, the tradition of Crew is both a *culture* and a *structure*. The term "crew" comes from educator Kurt Hahn, founder of Outward Bound. Hahn's quote "We are crew, not passengers, strengthened by acts of consequential service to others" inspired the EL Education motto, "We are crew." The culture of crew impels all members of a school community to work together as a team, to pitch in, to help others. Staff and students help their colleagues and peers get up the mountain together—individual success is not enough. The structure of Crew—daily meetings to support everyone's learning and growth—makes time for students to build meaningful relationships with peers and their Crew leader, to reflect on and monitor academic progress, and to focus on character development. Crew is also an engine for equity and inclusion, a place where all students feel they belong and can succeed. Crew leaders strategically plan Crew meetings to address and assess these multiple goals.

Other school structures can also help build crew culture and ensure that every student is well known and supported by peers and adults (e.g., community meetings, mentoring, peer counseling, restorative justice work, apprenticeships). The culture of crew extends beyond the school walls to relationships with families and community members.

A. Fostering a Culture of Crew among Staff

1. Leaders and teachers establish a culture of crew among staff that supports and is a model for the culture of crew among students.
2. Leaders and teachers ensure that every staff member feels respected and valued as part of the culture of crew, as well as supported to grow personally and professionally. (See also *Core Practice 34: Cultivating a Positive Professional Culture.*)
3. Leaders and teachers create structures and strategies to cultivate a positive culture among staff (e.g., orientation, mentoring, communication norms, team-building activities, readings, staff events that build relationships, appreciation traditions).
4. Leaders and teachers create systems to overcome challenges to a positive culture of crew (e.g., conversation protocols for discussion of diversity and equity, including staff members' own backgrounds and identities; equitable decision-making processes; protocols for conflict resolution among staff or in response to school crises).
5. Leaders and teachers plan staff Crew meetings to fit the school community (e.g., whole staff Crew meetings, grade/team or department Crew meetings, mixed small groups from across the building that meet regularly as staff Crews).
6. Staff Crew meetings (or the crew components of staff meetings) are focused not on the "business" of school, but on staff relationships, emotional health, growth, and sustainability.
7. Leaders and teachers sometimes use staff Crew as a structure to prepare staff to lead a student Crew effectively. Professional learning for Crew facilitation includes:
   a. Providing a Crew curriculum framework
   b. Providing sample Crew lessons or a Crew lesson format
   c. Teaching greetings and debrief strategies
   d. Modeling effective Crew facilitation (e.g., circling up, greetings, initiatives)
   e. Teaching specific team-building activities
   f. Teaching strategies for relationship-building, conflict resolution, and courageous conversations
   g. Addressing questions and concerns about Crew

B. Fostering a Culture of Crew among Students

1. Leaders and teachers ensure that every student has a Crew leader who gets to know that student well and serves as an advocate for the student's academic and social progress.
2. Leaders and teachers use a variety of structures and strategies to get to know students well (e.g., Crew time, home visits, flexible grouping, regular check-ins). They foster a culture of crew by supporting students to make friends, be heard, and interact as contributing members of the school community.
   a. Leaders and teachers create structures for welcoming new students who arrive midyear.
   b. Leaders and teachers foster multiyear connections between students of different ages and between students and adults in school and in the community. These connections may take the form of reading buddies, tutoring, mentoring, internships, apprenticeships, or other partnerships.

c. Leaders and teachers support students to feel safe, valued, respected, and included regardless of background or identity.

d. Leaders and teachers support all students to succeed and hold them accountable for high academic expectations.

3. Leaders and teachers celebrate the contributions of members of the learning community through community meetings, events, and other traditions.

C. Crew as a Structure in Primary and Elementary Classrooms

1. In primary and elementary classrooms, teachers generally serve as Crew leaders for their entire class. They typically hold Crew meetings daily at the beginning of the day (sometimes referred to as "morning meeting") and sometimes also at the end of the day.

2. Whenever possible, students in Crew sit or stand in a circle so they can see and hear each other without the interference of furniture. A circle allows Crew members to be equally vulnerable, connected, and supportive of one another.

3. Teachers as Crew leaders plan and facilitate Crew experiences that support building relationships, Habits of Character, literacy, portfolio work, adventure, and service learning.

   a. Crew leaders incorporate greetings, stories, appreciations, apologies, and other activities that foster students' sense of purpose, belonging, and agency.

   b. Crew leaders engage students in collaboration and competition in a joyful, supportive environment (e.g., through the use of team-building initiatives and cooperative problem-solving games). They debrief initiatives by helping students reflect on skills and mindsets that can be applied beyond the activity.

   c. Crew leaders facilitate student reflection on their Habits of Character. Positive behavior is celebrated. Concerns about behavior (e.g., discourtesy, bullying, exclusion, or not following classroom norms) are often addressed in Crew, sometimes through restorative circles or other conflict mediation strategies.

   d. Crew leaders facilitate student reflection on the relationship among their academic progress, Habits of Scholarship, and quality of their work. Often, students work on portfolios or prepare for student-led conferences in Crew.

   e. Crew leaders help students understand foundational concepts of EL Education, such as the concept of "crew, not passengers," the Design Principles, growth mindset, and Habits of Character.

4. Crew leaders form positive relationships with parents and other care providers, monitor academic progress, and lead interventions as needed so that every student knows that he/she can be a successful member of the Crew.

D. Crew as a Structure in Secondary Classrooms

1. Leaders and teachers establish a schedule that allows for Crew to meet on a consistent basis for a significant amount of time (30 to 60 minutes) most days of the week, every day if possible. (Crew is structured similarly to what some schools call "advisory.")

2. Leaders and teachers develop a schoolwide Crew curriculum with the following features:

   a. Includes learning targets, common lessons, common procedures, and tools for progress monitoring

   b. Designates specific purposes for Crew on different days or for different grade levels (e.g., literacy on Tuesdays, college preparation for juniors)

   c. Provides consistency in Crews across the school but also allows for individual Crew leaders to craft or customize lessons for Crew members

   d. Provides a pathway for college preparation (e.g., college visits, college research, applications, financial forms, interview preparation)

3. Leaders and teachers are careful to keep Crews small (8 to 15 students), so that students can fully participate and develop meaningful relationships with their peers and Crew leaders. Often staff beyond classroom teachers are trained and supported to be Crew leaders (e.g., athletic coaches, office staff, custodians, counselors).

4. Leaders and teachers determine how students are grouped for Crew in the way the school feels works best. Often Crews stay together over multiple years and Crew leaders stay with one Crew for multiple years (e.g., three years of middle school; four years of high school).

5. Crew is not homeroom. Crew leaders plan and prepare for meaningful lessons with learning targets. Students are active participants and leaders in Crew. In many schools, Crew is a credit-bearing, graded course. High school juniors and seniors use Crew to prepare for college admissions and postsecondary life.

6. Teachers as Crew leaders plan and facilitate Crew experiences that address healthy relationships, Habits of Character, literacy, portfolio work, adventure, and service learning.

   a. Crew leaders incorporate greetings, stories, appreciations, apologies, and other activities that foster students' sense of purpose, belonging, and agency.

Building the Culture and Structure of Crew (continued)

b. Crew leaders engage students in collaboration and competition in a joyful, supportive environment (e.g., through the use of team-building initiatives and cooperative problem-solving games). They debrief initiatives by helping students reflect on skills and mindsets that can be applied beyond the activity.

c. Crew leaders facilitate student reflection on their Habits of Character. Positive behavior is celebrated. Concerns about behavior (e.g., discourtesy, bullying, exclusion, or not following classroom norms) are often addressed in Crew, sometimes through restorative circles or other conflict mediation strategies.

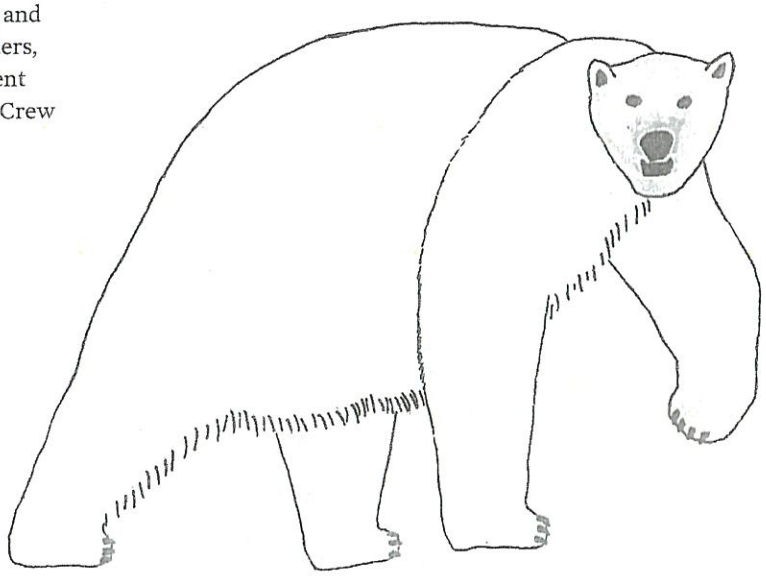
d. Crew leaders facilitate student reflection on the relationship among their academic progress, Habits of Scholarship, and quality of their work. Students often work on portfolios or prepare for student-led conferences in Crew.

e. Crew leaders help students understand foundational concepts of EL Education, such as the concept of "crew, not passengers," the Design Principles, growth mindset, and Habits of Character.

7. Crew leaders ensure that all their students know about and have access to demanding academic courses, extracurricular activities, academic and social supports, and the best sequence of classes for college placement or postgraduation pursuits.

8. Crew leaders guide and support the college application process for students, including financial aid and scholarships, especially for first-generation college applicants. School counselors support Crew leaders in this work.

9. Crew leaders form positive relationships with parents and other care providers, monitor academic progress, and facilitate conversations between students, care providers, and other staff members as needed so that every student knows that he/she can be a successful member of the Crew and is ready for graduation.



Core Practice 24

Engaging Families and the Community in the Life of the School

Families are key partners in the education of their children. In the EL Education model, staff members make families welcome, value their contributions and backgrounds, and engage them actively in the life of the school. Leaders and teachers explicitly recognize that families care about their children's education, bring strengths, and add value to the community. Leaders and teachers communicate with families regularly and respectfully and provide multiple ways to contribute to the academic and social life of the school. Leaders and teachers encourage families to be strong partners in their children's learning. In addition, leaders and teachers build and sustain partnerships with community organizations and cultural institutions. Students are accustomed to interacting with visiting community members.

A. Welcoming Families and Visitors

1. Leaders and teachers offer a variety of ways for families to participate in the school community (e.g., as a board member, Leadership Team member, tutor, reading buddy, classroom expert, passage portfolio panelist, fundraiser). They seek opportunities to build on and build up parents' strengths as partners in their child's education.
2. Leaders and teachers organize interactive family education events throughout the year (e.g., orientation, an open house to showcase work in progress, a family mathematics night, workshops on social and emotional learning). Such events are opportunities for families to participate as learners and teachers.
3. Leaders and teachers teach students how to actively welcome visitors to the school by training classroom or school ambassadors to welcome guests, share highlights about the school, and speak eloquently about their experience as students.
4. Leaders ensure that student-led tours of the school are tours of learning, not just physical tours to point out the rooms. Students describe the student work on the walls, in portfolios, and in classrooms. They share the story of the school and explain the school's mission and Habits of Character.

B. Building Relationships with Families

1. School leaders and teachers actively seek to learn about the cultures, backgrounds, and values of their students' families. They understand that families from historically underserved groups may have had negative experiences with schooling—their own or their children's. Leaders and teachers work to earn the trust of all families through the following strategies:
   a. Leaders and teachers examine their own biases and personal stories around race, ethnicity, class, gender, and the struggle for educational diversity and equity within and beyond their community in order to develop empathy for students and families.
   b. Leaders and teachers develop and seek input on school procedures and systems that are inclusive and respectful of all members of the school community and all the ways they can contribute to the school.
   c. Leaders and teachers create structures and traditions to welcome families *throughout* the year, not just at the beginning of the year.
2. Leaders and teachers recognize that families are an important part of the broader crew that supports students to succeed. They demonstrate that they are accessible, visible, and come to the table as learners and partners with families through the following actions:
   a. Leaders articulate clear expectations for families' role and responsibilities in their child's education.
   b. Leaders and teachers provide volunteer opportunities for families.
   c. Leaders articulate grievance procedures that respect families as partners, value all voices, and help all members hold each other accountable for upholding the school's mission and norms.
3. Leaders and teachers encourage and support all families to participate in school events. They schedule events outside of the school day, assist with transportation, provide food, childcare, and translators, and otherwise seek to make school participation accessible and equitable for all families.
4. Leaders create channels to get feedback from families, foster respectful communication, hear diverse perspectives, and facilitate collaborative problem solving when conflicts arise.
5. School leaders systematically and transparently track family participation and feedback through volunteer logs

and school event evaluations. Leaders respond to these data by revising strategies to ensure maximum involvement of families.

C. Communicating with Families

1. Leaders and teachers communicate with families regularly and respectfully before and throughout the school year.
   a. Leaders and teachers create, publicize, and frequently update an annual calendar of events and meetings that invites families to celebrate with students, contribute to the school, and participate in the school's decision-making and planning (e.g., celebrations of learning, community workdays, fund-raisers, school improvement planning).
   b. Leaders develop a publication plan that includes a range of publications and formats (e.g., handbooks, newsletters, annual report, website, e-blast, online grade book) to ensure that all families have access to and understand the school's policies, curriculum, approaches to instruction, and assessment system. They examine and revise the plan to ensure that every family has access, including families whose home language, levels of education, or technological means may present barriers to access.
   c. Leaders and teachers communicate regularly and in a variety of ways with families about students' progress and accomplishments (e.g., informal notes home, interim and end-of-term progress reports, conferences, emails, phone calls).
   d. Leaders seek input from families that don't come to events. They inquire about family members' needs, hopes, and concerns and create ways for all families to participate, including providing translation for families that require it.
2. Leaders and teachers develop protocols and documents to support student-led conferences as a cornerstone of communicating student achievement. (See also *Core Practice 31: Communicating Student Achievement.*) They expect and support all families to participate in this practice. They expect all students to prepare for and do their best in their conference.
3. Leaders and teachers regularly showcase student work and student reflections in schoolwide or classroom-based celebrations of learning. During these events, students themselves act as presenters and docents to explain their learning to families.

D. Building Community Partnerships

1. Leaders and teachers build and sustain relationships with community organizations and cultural institutions that support key school structures like fieldwork, experts, service learning, and authentic audiences for student work.
2. Leaders intentionally build relationships within the community to develop a broad constituency that supports and advocates for the school.
3. Leaders, teachers, and students embrace their responsibility as members of and contributors to the surrounding community.
4. Leaders, teachers, and students recognize the contributions of outside experts and volunteers (e.g., experts are invited to celebrations of learning; students send thank you notes to volunteers).

Core Practice 25

Creating Beautiful Spaces That Promote Learning

In the EL Education model, the physical space of the school reflects and supports the learning environment and the values of the school. When people enter the school, they are immediately aware of being in a place that celebrates learning. The walls are filled with high-quality student work showcased in common spaces and classrooms. Student work is displayed in a way that honors the work, giving parts of the school a museum quality that inspires student and community pride. Work is often supported by explanatory text that includes student voice and reflection. The mission of the school is evident to guests, students, and teachers throughout the building.

Student achievement is honored in public spaces, whether it is academic, artistic, athletic, or a demonstration of good character. Students themselves are leaders in caring for common spaces within the school and on the grounds, helping to make and keep the school as beautiful as possible.

A. Designing the Learning Space

1. School leaders, teachers, and students ensure that classrooms and common spaces are clean and maintained with care and pride. Whenever possible, students are leaders in this work.
2. The primary entryways for the school are welcoming and beautiful, with displays that send a clear message that the school is a place of high achievement, quality work, and student and adult character. Signage makes the values and mission of the school clear to all.
3. Leaders and teachers display high-quality student work rather than commercial posters and signs in classrooms and common spaces. Student work is supported with text that makes clear what students learned. Often, students also create signs related to the school's values, Habits of Character, or norms.
4. Teachers design classroom spaces that are rich with resources for student learning (e.g., books, technology, manipulatives, art supplies, science equipment, models, natural specimens).
5. Teachers design classrooms to facilitate student thinking, independence, and character development. They organize and label supplies, post expectations, directions, and schedules, and artistically display current academic work as well as anchor charts representing key learning.
6. Students take primary responsibility for the care of classroom resources. They treat the learning environment, in particular live plants and animals, with great respect and care.
7. Throughout the building, leaders and teachers celebrate and visibly showcase work that references EL Education's Dimensions of Student Achievement: mastery of knowledge and skills, character, and high-quality student work. They display tributes to sportsmanship, adventure learning, art, and other academic pursuits.
8. Teachers and students connect their classroom learning to the natural world by caring for and learning in outdoor spaces. Often, they display items from the natural world (e.g., plants, rocks and minerals, bones, aquariums and terrariums with live animals) as they would be displayed in a museum, in order to inspire wonder and scientific understanding.

B. Documenting Student Learning

1. Teachers and students create artful displays of student work that feature the work of all students, honoring individual and collective growth and inspiring all students to create work of quality.
2. Teachers and students use bulletin boards and hallway walls to tell the story of student learning through documentation panels that include artifacts such as:
   a. Rough and final draft student work
   b. Guiding questions and learning targets
   c. A narrative about the learning
   d. Photographs
   e. Quotes from students and teachers
   f. Student and teacher reflections
3. Students' presentations of their learning, referencing documentation panels, are a highlight of celebrations of learning.

Core Practice 26

Promoting Courage and Adventure

The spirit of courage and adventure that permeates the EL Education model is a clear expression of EL Education's roots in Outward Bound. Leaders and teachers encourage students to work on building their courage across multiple aspects of their academic and social lives, to develop, for example, "fractions courage," "poetry courage," or "friendship courage." Similarly, adventure can be any physical, artistic, or academic experience that involves risk, challenge, and discovery. Adventure bolsters student engagement and strengthens students' courage.

EL Education promotes the kinds of adventures that create opportunities for leadership and collaboration as groups of students and teachers face challenges both alone and together. Reflection is a vital component of such adventures, so that each experience is a rich opportunity for learning about oneself, one's peers, and the world. Teachers take care when planning adventures to ensure physical and emotional safety, while at the same time promoting risk-taking and courageous action.

A. Learning through Adventure

1. Leaders and teachers build community and provide opportunities for student leadership and teamwork through school adventure traditions. These traditions scaffold through increasingly challenging physical and academic adventures (e.g., a first-grade campout in the gym, a sixth-grade bike trip, a ninth-grade mural project, a high school service project).
2. Leaders and teachers sometimes facilitate outdoor adventures in which students investigate the natural world in open spaces near the school, local parks, or through school-organized wilderness and nature experiences. Leaders and teachers offer outdoor adventure opportunities with the following features:
    a. Leaders and teachers ensure that such adventure experiences are accessible to all students regardless of ability to pay, physical ability, or experience in the outdoors.
    b. Leaders and teachers challenge students to stretch their comfort zones, work together to accomplish a difficult goal, and gain confidence in their individual skills in the face of challenge.
    c. Teachers embrace their own challenges and model healthy risk-taking. They learn and grow alongside their students.
3. Leaders and teachers structure multiple opportunities for students to reflect on and learn from successes and challenges in their physical and academic adventures. They circle up and debrief frequently, focusing on topics such as healthy risk-taking, collaboration and leadership strategies, and how the culture of crew supports individuals to do more than they think possible.
4. Teachers explicitly frame challenging tasks in lessons, case studies, projects, and learning expeditions as opportunities for academic courage, grappling, and risk-taking. Students embrace academic courage through challenge in the classroom.
5. Teachers help students to identify new challenges as learners and to choose tasks that are both meaningful and challenging, such as conducting original research, collaborating with professionals, and revising products multiple times for authentic audiences.
6. Leaders and teachers craft experiences and debriefs that help students understand that taking risks—with support—is often when the most powerful learning takes place.
    a. Teachers promote fieldwork in the natural world or in a city environment as an opportunity to embrace courage and adventure.
    b. Teachers frame student leadership roles (e.g., peer mediation groups, mentoring younger students) as opportunities to embrace courage and adventure.
    c. Leaders promote collaborations between schools or between their school and a local nonprofit with different context (e.g., pen pal relationships with a school in another country, a joint service project between students in different neighborhoods) as opportunities to embrace courage and adventure.
7. Leaders and teachers explicitly connect the school's Habits of Character to academic and physical adventure experiences (including individual and team sports) through the following actions:
    a. Supporting students to reflect on their success, challenges, and personal growth on such Habits of Character as perseverance, problem solving, and collaboration

b. Providing constructive feedback to students who take risks and encouraging them to learn from mistakes, rely on their Crew, keep trying, and celebrate small victories as they work toward their goals

c. Celebrating and publicly acknowledging students' courage and growth as the path toward achievement and meeting personal goals

8. Students use reflections from adventure experiences as artifacts or evidence in student portfolios, passage presentations, or other documentation of growth in Habits of Character.

B. Teaching Adventure Skills and Ensuring Safety

1. The school has policies, protocols, and regulations to ensure that physical education classes, sports programs, physical adventure programming, extracurricular programs, and fieldwork are safe. For off-campus adventure programming, they may contract with a professional organization like Outward Bound.

2. Leaders provide professional learning and ongoing coaching to ensure that teachers, Crew leaders, and adventure trip chaperones have the structures and skills to guide adventure activities. Professional learning includes:

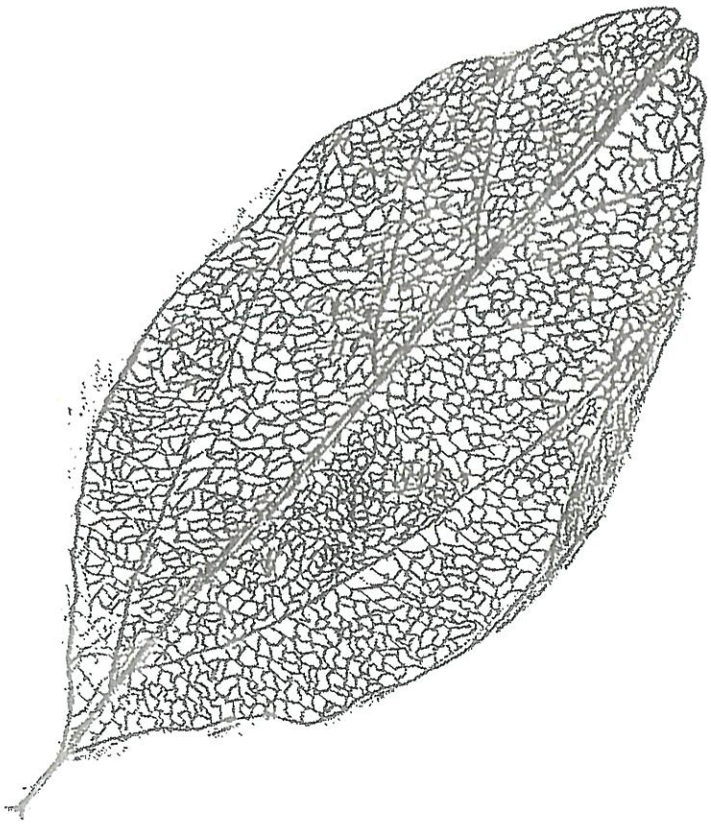
   a. Developing norms and expectations for collaboration, conflict resolution, monitoring safety, and supporting all students to do more than they think possible

   b. Aligning adventure activities with the school's Habits of Character to help teachers and students understand their purpose and value through appropriate framing, implementation, and debrief

   c. Giving teachers opportunities to experience and reflect on their own adventure activities and to practice framing and leading adventure-based activities with other adults before they do so with students

   d. Training in social and emotional safety (e.g., communication, countering implicit bias, when to defer to professional counselors or therapists)

   e. Training in first aid and protocols for emergency situations (e.g., CPR, Wilderness First Aid or Wilderness First Responder medical certifications)

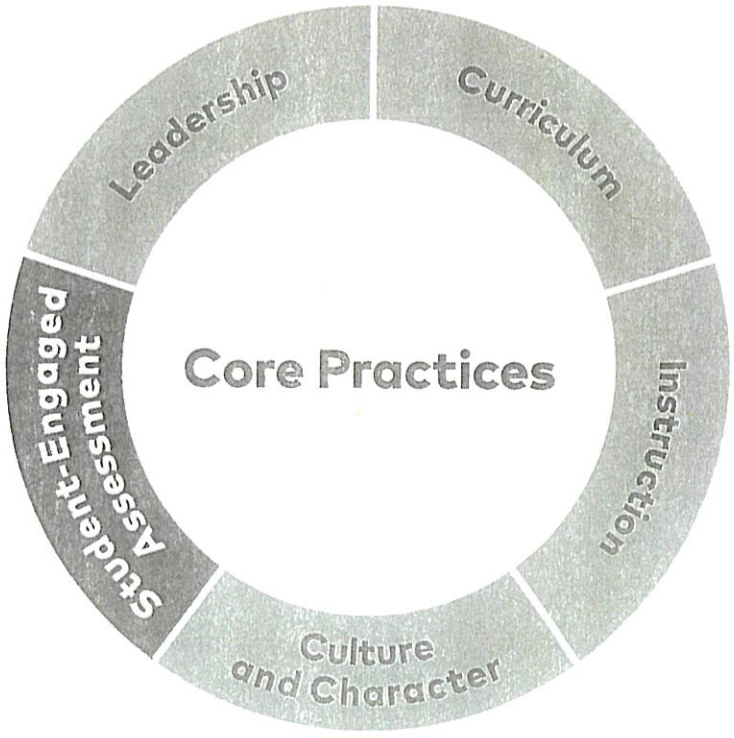


Student-Engaged Assessment

EL Education believes that assessment practices should motivate students to become leaders of their own learning. Students track their progress toward standards-based learning targets, set goals, and reflect on growth and challenges. Students and teachers regularly analyze quantitative and qualitative data that include assessments, reflections, and student work and use those data to inform goals and instruction. Students regularly present evidence of their achievement and growth through student-led family conferences, passage presentations, and celebrations of learning.

Core Practices in This Domain

- Cultivating a Culture of Engagement and Achievement
- Crafting and Using Learning Targets
- Checking for Understanding in Daily Instruction
- Using Assessments to Boost Student Achievement
- Communicating Student Achievement



Core Practice 27

Cultivating a Culture of Engagement and Achievement

Student-engaged assessment is a hallmark of the EL Education model. When assessment is done *with* students instead of *to* them, students take responsibility for and lead their own learning. They see themselves as the key actors in their own success. This creates a culture of engagement and achievement in which all students and adults believe that effort and reflection lead to academic growth and high-quality work. Teachers use multiple methods of formative and summative assessment to track students' progress toward academic learning targets and Habits of Scholarship (e.g., perseverance, collaboration, responsibility). Teachers continually analyze quantitative and qualitative evidence of student performance to inform their instruction. Students learn to reflect deeply and concretely on their own performance data, assess their own learning, use feedback from peers and teachers, and set goals for achievement.

A. Developing a Growth Mindset

1. Leaders, teachers, staff, and parents believe and communicate that all students are capable of high academic achievement and that achievement grows with effort. This belief permeates actions and decisions.
   a. Leaders and teachers reinforce their own and students' growth mindset by framing challenging tasks as worthy tasks requiring academic courage and effort.
   b. Leaders provide professional learning for teachers and education for parents on the impact of academic mindsets on achievement.
   c. Leaders and teachers examine assessment practices for implicit bias toward historically underserved groups.
2. Teachers recognize and reinforce students' effort, perseverance, and strategic actions. They avoid "fixed mindset" comments about ability, intelligence, or talent.
3. Teachers and students provide descriptive feedback that empowers students and peers to build on their strengths, learn from mistakes, revise, and correct misconceptions.

B. Supporting Students to Be Leaders of Their Own Learning

1. Teachers translate required standards and Habits of Scholarship into academic and character learning targets for lessons, projects, units, and courses. (See also *Core Practice 28: Crafting and Using Learning Targets.*)
2. Teachers use learning targets purposefully to ensure that students take ownership of their own learning.
3. Teachers provide opportunities for students to reflect on and analyze data as a way to track progress toward learning targets and set goals. (See also *Core Practice 30: Using Assessments to Boost Student Achievement.*)
   a. Students use data from checks for understanding, written formative assessments, interim assessments, or summative assessments (e.g., patterns of error on a math test, time spent on homework) to analyze the root cause of successes and challenges in meeting specific learning targets.
   b. Students regularly assess their own growth through organizing and reflecting on evidence of their learning They are required and supported to present their work publicly and share their analysis and goals.
4. Teachers guide students to assess and improve the quality of their work through the use of models, critique, rubrics, and, sometimes, work with experts. (See also *Core Practice 12: Planning for and Supporting High-Quality Work.*)
5. Teachers articulate how assessments are a source of information that helps students grow. Incremental successes motivate students to step up to increasing levels of challenge.

Core Practice 28

Crafting and Using Learning Targets

Learning targets are the foundation of a student-engaged assessment system. Teachers translate required standards into learning goals for courses, projects, units, and lessons in language that students can understand and own. Teachers refer continually to learning targets during the lesson, check for understanding of learning targets, construct formative and summative assessments that match learning targets, and track students' progress toward targets. Students demonstrate their ownership of their learning by articulating the connections between learning targets and the work of the lesson and by showing evidence of their progress toward meeting them.

A. Crafting Learning Targets

1. Teachers analyze their curriculum map. (See also *Core Practice 2: Mapping Knowledge, Skills, and Habits of Character.*) They unpack and discuss their standards with grade-level peers to develop a deep and shared understanding of what the standards are asking students to know and do.
2. Teachers analyze and discuss the discipline-specific ways of thinking expected by the standards for their subject area (e.g., classifying in science, valuing evidence in ELA, abstract reasoning in math) and can articulate how these ways of thinking support learning.
3. Teachers document and periodically review the alignment of standards, learning targets, and assessments as part of their curriculum maps.
4. Teachers translate their standards into high-quality learning targets that have the following characteristics:
    a. They are derived from national or state standards embedded in school or district documents such as curriculum maps and adopted program materials.
    b. They are written in student-friendly language and begin with the stem "I can...."
    c. They are measurable and use concrete, assessable verbs (e.g., identify, compare, analyze).
    d. They are specific, often referring to the particular context of a lesson, project, or case study.
    e. They are phrased to identify the intended learning, not the intended doing. That is, learning targets are phrased as statements about the skills or knowledge students will develop as opposed to what students will complete (e.g., "I can describe the ideal habitat for a polar bear" vs. "I can write a paragraph about the habitat of a polar bear").
    f. They are phrased to identify the knowledge, reasoning, or skill that matches the cognitive process demanded of students (e.g., "analyzing" or "creating").
5. Teachers sequence daily learning targets that scaffold students' ability to achieve mastery of a standard. When sequencing targets, teachers consider the following questions:
    a. How many lessons do students need to master the discrete skill, knowledge, or reasoning in this learning target?
    b. What sequence of daily learning targets will build students' knowledge and skills over time, scaffolding students to mastery of a standard (or long-term target)?
    c. What character learning targets support the topic and tasks I'm asking students to do (e.g., "I can seek multiple perspectives in our discussion of civil rights," "I can persevere to improve my work through multiple revisions")?
    d. When should I use a character learning target alongside an academic target so that students have multiple opportunities for growth (e.g., "I can be productive and focused when working independently," "I can contribute to my classroom community by reliably doing my classroom job," "I can speak and listen respectfully to my peers")?

B. Using Learning Targets in Daily Instruction

1. Teachers use learning targets to articulate specific learning outcomes for students, so that all students know the target they are aiming for and understand the criteria for success before independent practice. Teachers unpack the learning target with students through the following actions:
    a. Guiding students to restate the learning target verb in their own words (e.g., analyze, explain, solve)
    b. Identifying and defining academic or domain-specific vocabulary in the learning target
    c. Communicating how the learning target will be assessed before students demonstrate their learning in relation to the target

2. Teachers sometimes pre-assess students' proficiency on the learning target as part of the "do now" activity in a lesson.

3. Teachers choose the optimal time to introduce learning targets during a lesson. (See also *Core Practice 10: Planning Effective Lessons* and *Core Practice 11: Delivering Effective Lessons*.)

   a. In a Workshop 1.0 lesson, this is typically at the outset of the lesson, or after a "hook" that builds excitement.

   b. For a discovery-based lesson or Workshop 2.0 lesson structure, this is typically after students have grappled with a problem or text, discussed their strategies, or raised questions and hypotheses.

4. Teachers refer to the learning target throughout the lesson through the following actions:

   a. Explaining how daily learning targets are related to standards or long-term learning targets

   b. Pausing instruction or work time periodically to reorient students to the learning target and correct misconceptions or false starts

   c. Using checks for understanding to assess where students are in relation to the learning target

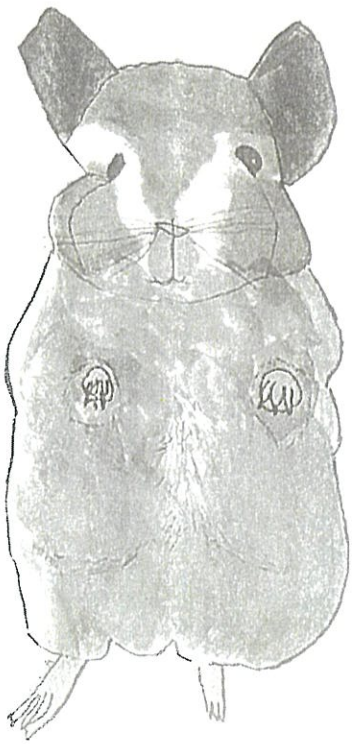
   d. Debriefing the learning in the context of the learning target at the end of the lesson

5. Teachers ensure that students:

   a. Can articulate the meaning and purpose of learning targets

   b. Regularly track their progress toward learning targets through quick checks, formative assessments, or target trackers

   c. Know where they are in relation to the learning target and what they need to do to get closer to meeting it



Core Practice 29

Checking for Understanding in Daily Instruction

The EL Education model promotes student-engaged assessment strategies that help students reflect on and lead their own learning. Teachers use these strategies so that students understand what they know and can do at the outset of learning and as they progress toward learning targets. Students are able to articulate their understanding and set meaningful goals for applying their learning and improving their work.

A. Starting with Learning Targets[5]

1. Teachers anchor their planning, lessons, and assessments in well-crafted learning targets.
2. Teachers gauge student progress against learning targets. They ensure that students know and can articulate where they are in relation to proficiency on academic and character learning targets.

B. Using Protocols and Engagement Strategies

1. Teachers use protocols and engagement strategies to ensure that all students participate in whole group discussions (e.g., Cold Call, No Opt Out).
2. Teachers engage students actively and equitably (e.g., by using Think-Pair-Share, Back-to-Back and Face-to-Face).
3. Teachers use Conversation Cues that promote productive and collaborative discussion (e.g., "Tell me more," "How is what x said different than what y said?").

C. Listening and Observing Strategically

1. Teachers circulate while students are working and engaged in structured small-group discussions to observe learning in action (e.g., during the "grapple" portion of a Workshop 2.0 lesson, they listen to determine what students collectively know or can do and to identify common misconceptions).
2. During observation, teachers ask open-ended (how? why? what if?) questions that prompt students to extend their thinking.
3. Teachers sometimes use a checklist to track evidence as they circulate, especially during the "apply" portion of a Workshop 2.0 lesson.

D. Using Quick-Check Techniques

1. Teachers use quick-check techniques to engage students in checking their own understanding, to monitor confusion or readiness, to determine the status of the class as a whole, or to probe for deeper understanding (e.g., Go Around, Clickers, Human Bar Graph, Hot Seat).
2. Teachers periodically pause instruction or work time to address misconceptions or false starts.

E. Deepening Understanding through Questioning

1. Teachers ask sequenced, pre-planned strategic questions that deepen critical thinking and build students' understanding of the concept or skill in the lesson.
2. Teachers require students to use evidence from the text or data sets to support their answers.
3. Teachers help students learn how to formulate their own strategic questions.
4. Teachers encourage students to ask questions of themselves and others to monitor and augment their understanding, especially during the discussion portion of a Workshop 2.0 lesson. (See also *Core Practice 11: Delivering Effective Lessons.*)
5. Teachers provide adequate think time so that all students have time to process and construct an answer.

F. Self-Assessing, Reflecting on Progress, and Setting Goals

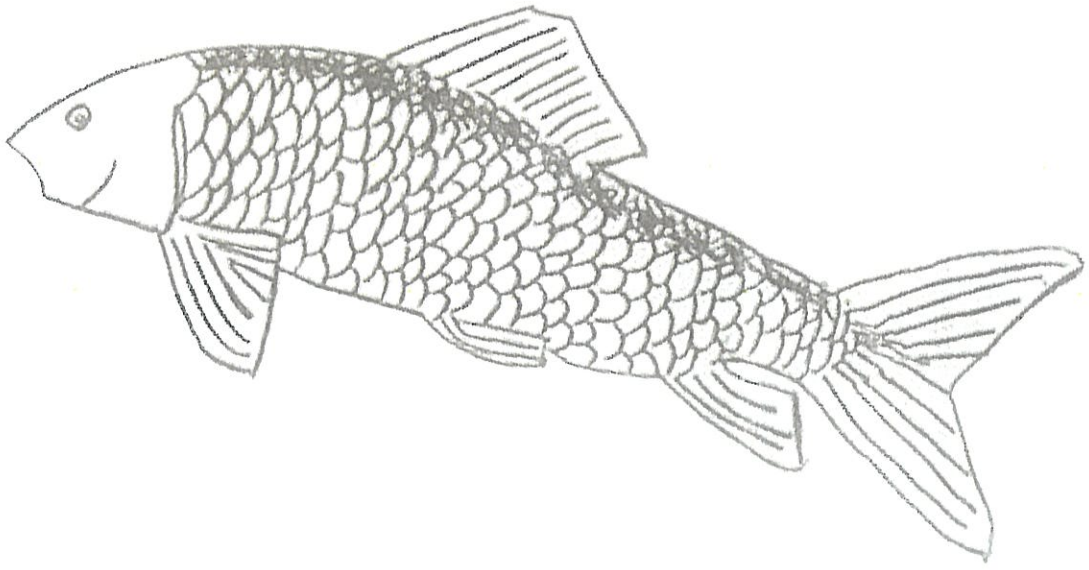
1. Teachers use models and critique sessions to help students develop an understanding of quality in texts and in their own product creations and to set goals for progress. (See also *Core Practice 12: Planning for and Supporting High-Quality Student Work.*)
2. Teachers provide descriptive feedback and facilitate peer feedback sessions that enable students to reflect, self-assess, and set goals for revision. (See also *Core Practice 12: Planning for and Supporting High-Quality Student Work.*)

5. This practice is detailed in *Core Practice 28: Crafting and Using Learning Targets.*

3. Teachers debrief lessons to help students reflect on their individual and collective progress. Students reflect on both what they learned and how they learned, using private and public protocols for reflection (e.g., journals, learning target trackers, exit tickets, or dialogue).

4. Teachers provide explicit instruction on self-assessing with accuracy (e.g., with reference to specific criteria lists or rubrics) and providing evidence to support their claims about progress toward learning targets.

5. Teachers help students identify strategies and next steps needed to achieve learning targets. With support from teachers, students create action plans for academic goals as well as Habits of Character.



Core Practice 30

Using Assessments to Boost Student Achievement

In the EL Education model, teachers and leaders use a variety of assessment types to measure students' mastery of standards and regularly involve students in understanding and analyzing their own assessment data. (See also *Core Practice 29: Checking for Understanding in Daily Instruction.*) Teachers use high-quality assessment data, both formative and summative, to reflect on the effectiveness of curriculum, instruction, and schoolwide structures such as schedules, academic groupings, and intervention programs. Finally, assessments provide a body of evidence for grading, reporting, promotion, and graduation that must be communicated to the community, district, state, and other stakeholders.

Teachers and leaders choose, create, and schedule high-quality classroom assessments in order to get a complete and accurate picture of student learning throughout the year and to prepare students for interim assessments and high-stakes standardized tests. They analyze test results to inform action plans, make instructional adjustments, and set goals for improvement. Students also analyze their own data, use it to identify strategies for success, and communicate their data and their goals to families.

A. Choosing or Creating Quality Assessments

1. Teachers choose, adopt, or craft quality assessments in order to collect meaningful, accurate, and timely information about student learning. These include formative and summative assessments (e.g., paper and pencil tests, on-demand assessments of writing, performance assessment tasks, online interim assessments).
2. Teachers align assessments with required standards and then plan backward to identify the sequence of assessments that will be used to measure mastery of concepts and skills incrementally and repeatedly throughout the year.
3. Teachers choose or design and then test-drive major assessments as part of their initial planning for a unit to ensure that these assessments accurately measure and align with desired learning targets.
4. Teachers select the type of assessment that is best matched to what they are assessing (e.g., multiple choice to assess factual knowledge, performance tasks to assess skills).
5. Teachers collaboratively create or choose common assessments for key skills or content. Common assessments improve consistency and reporting of student proficiency.

B. Preparing Students for Assessments

1. Teachers ensure that students understand the purpose and outcomes of different types of assessment so that students clearly see the connection between learning targets and assessments.
2. Teachers scaffold instruction to build students' knowledge, skills, and reasoning (e.g., cognitive strategies such as analysis, interpretation, problem solving). They support students to identify patterns and big ideas linked to disciplinary content.
3. Teachers use formative assessments (assessments for learning) to give students experience with summative assessment tasks (assessments of learning) and build their capacity to accurately self-assess their progress toward learning targets.
4. Teachers encourage productive study habits (e.g., forming peer study groups, text-coding notes, memorizing mnemonics, using flashcards).
5. Teachers prepare students for standardized tests throughout the school year, not as an isolated event just prior to a testing situation.
    a. Teachers help students analyze the formats used on standardized tests (e.g., writing to prompts, multiple choice questions, showing thinking in mathematics and science) and teach them to respond to these formats by applying strategies such as using context clues.
    b. Teachers give strategic practice tests to boost students' confidence with the test-taking format, timing, and procedures.
    c. Teachers empower students to improve their performance by applying test-taking strategies, strengthening Habits of Scholarship (e.g., time management, perseverance, problem solving), and practicing self-care to reduce test anxiety (e.g., exercise, a healthy diet, sleep, meditation).

C. Using Assessment Data with Students

1. Teachers ensure that related learning targets are posted on assignments, and when appropriate, on assessments, so that students understand how academic tasks demonstrate mastery of targets.
2. Teachers support students to analyze their own assessment data and track their progress toward learning targets. (See also *Core Practice 27: Cultivating a Culture of Engagement and Achievement.*)
3. Students regularly analyze strengths, challenges, and patterns in their performance on assessments and on related assignments. They may keep data notebooks or folders to document their findings.
4. Based on assessment data, students set learning goals and determine next steps to reach them.
5. Students present and explain their own data to families in student-led conferences. (See also *Core Practice 31: Communicating Student Achievement.*)

D. Using Assessment Data to Drive Student Achievement and School Improvement

1. Teachers individually and collaboratively analyze assessment data. They deliberately and thoughtfully use assessment data to identify patterns in student responses to test items. This practice informs curriculum mapping and lesson planning and helps teachers to evaluate, adjust, and differentiate instruction.
2. School leaders provide professional development to support teachers in implementing and analyzing assessments. (See also *Core Practice 33: Leading Evidence-Based Strategic Improvement* and *Core Practice 36: Leading Professional Learning.*)
3. Teachers and school leaders create or select interim assessments, designed to benchmark student progress toward end-of-year goals, that are closely aligned to required standards and standardized tests. They ensure that interim assessments match the rigor of the end-of-year or end-of-course assessments.
4. Leaders and teachers articulate the value and purpose of standardized tests. They help families and students understand that this data allows educators to adjust curriculum and instruction to meet the needs of all students as they move up through the grades.
5. Leaders and leadership teams regularly analyze data as part of the school-improvement process. They use it to set goals and create action plans for improvement and to document growth and achievement.

Core Practice 31

Communicating Student Achievement

In the EL Education model, student achievement is communicated in traditional ways (e.g., report cards) and also in ways that allow students to take the lead in speaking about their own learning. Leaders and teachers create structures and procedures that support students to create, maintain, and present portfolios demonstrating growth and achievement during student-led conferences, passage presentations, and celebrations of learning. They also implement standards-based grading systems that communicate academic outcomes relative to specific required standards and, separately, outcomes on Habits of Scholarship. Teachers involve students in the dialogue about assessment and communicating achievement. Students can articulate what they have learned and speak to their own strengths, struggles, goals, processes of learning, and preparation for college and career success.

A. Implementing Standards-Based Grading

1. Teachers determine grades that describe students' current proficiency in relation to specific standards. For example, they may use a 1–4 point scale, with a 1 meaning a student "does not meet the standard" and a 4 meaning a student "exceeds the standard." Recent evidence takes precedence over older evidence so that students' grades reflect what students know and can do now, rather than an average of their proficiency over time (as represented by a percentage).
2. Teachers within subject-area departments or grade levels compare and calibrate their grading practices to ensure that they are using grades to objectively describe students' mastery of knowledge and skills, not to motivate future efforts or punish past failures.
3. Teachers communicate long-term learning targets to students and families at the outset of instruction. Over the course of the term, they provide students with multiple opportunities to demonstrate progress toward long-term learning targets. Students can articulate how their grades reflect proficiency on learning targets, rather than the subjective judgments of teachers.
4. Leaders and teachers develop uniform grading practices that ensure schoolwide consistency in grading. They communicate these practices to students and families in school documents and timely electronic and verbal communications.
5. Teachers determine grades for academic learning targets separate from scores for Habits of Scholarship. Success in both areas is considered in credit, promotion, and graduation policies.

B. Communicating about Habits of Scholarship

1. Leaders and teachers collaborate to create a coherent and consistent system for collecting evidence of students' Habits of Scholarship.
   a. Teachers assess Habits of Scholarship (e.g., perseverance, collaboration).
   b. Teachers often use evidence of homework completion, meeting deadlines, and prompt attendance to support Habits of Scholarship grades.
   c. Teachers and leaders develop rubrics and guidance documents to ensure that all teachers assess Habits of Scholarship fairly and consistently.
2. Leaders and teachers support students and family members to recognize the relationship between Habits of Scholarship and academic achievement.
   a. Leaders, teachers, and students track this correlation over time and share it with families.
   b. Students set goals and write action plans to improve their Habits of Scholarship in order to improve their academic achievement.
3. Teachers report student proficiency on Habits of Scholarship in multiple ways.
   a. Habits of Scholarship are communicated on progress reports (separately from academic grades).
   b. Students provide evidence of and share their progress on Habits of Scholarship in student led-conferences and passage presentations.
   c. Leaders and teachers recognize Habits of Scholarship in school awards, community circles, and other public acknowledgements.

C. Communicating Achievement on Report Cards and Transcripts

1. Teachers report progress toward specific standards-aligned learning targets (not just letter grades).
2. Leaders and teachers ensure that students and families understand the connection between classroom grading policies and school reporting practices.

a. This information is included in family handbooks and family education/information sessions.

b. Teachers often ask students to track and record their own progress toward meeting learning targets during class time. Grades reported at the end of term should not be a surprise to students.

c. Teachers communicate concerns about student progress to students and families along the way, so that students, families, and teachers can intervene appropriately.

3. Leaders create a succinct document that explains how student grades are derived and what they mean. This document accompanies student transcripts when they are sent to outside audiences (e.g., college admissions offices).

D. Communicating Achievement through Celebrations of Learning

1. Leaders and teachers organize grade-level or schoolwide events to celebrate the learning of all students. These often take place at the end of learning expeditions, units, or school terms.

2. Teachers invite families, community members, and school partners to serve as an authentic audience for celebrations of learning.

3. Teachers prepare students to serve as docents and presenters of their own learning and create protocols that enable family members to ask questions about student work, interact with students and teachers, and honor the school's mission.

E. Communicating Achievement through Portfolios

1. Leaders and teachers collaborate to create a system for documenting student work across subject areas in portfolios.

   a. Teachers define the purpose and organizing structure of portfolios (e.g., by discipline, dimension of achievement, or learning target).

   b. Teachers determine what will be in portfolios to provide context for student work (e.g., a table of contents, reflections, resume, section overviews, assignment rubrics showing learning targets).

   c. Teachers determine what student work will be included, how pieces will be selected, and whether to include multiple drafts, self-reflections, or feedback from teachers. They create a checklist or other guidance documents to help students create quality portfolios for presentation.

   d. Teachers determine whether to include service learning logs and/or reflections on Habits of Character.

F. Communicating Achievement through Student-Led Conferences

1. Leaders schedule time at least twice per year for student-led conferences in which students communicate progress in their learning to family members or other caregivers. Student-led conferences address all EL Education's Dimensions of Student Achievement: mastery of knowledge and skills, character, and high-quality student work.

2. Leaders and teachers support families to understand the structure, purpose, and expectations of student-led conferences. They communicate the schedule in advance and help families understand the roles and responsibilities of teachers, students, and parents during the conference.

3. Teachers or Crew leaders support students in preparing for conferences (often during Crew) by doing the following:

   a. Creating classroom systems for archiving student work

   b. Supporting students in selecting work for their portfolios

   c. Supporting students in naming and being able to demonstrate what they have learned

   d. Supporting students to reflect on and articulate their progress, to identify areas for growth, and to set aspirational and achievable goals

   e. Making time for students to prepare for and practice their student-led conference presentation, with attention to criteria such as eye contact, clear articulation, and presenting evidence to support their claims about learning

G. Communicating Achievement through Passage Presentations

1. Leaders and teachers create passage presentation structures in which students present their readiness to move forward to the next level of their educational journey (e.g., from elementary to middle school, middle to high school, high school to college).

2. Leaders and teachers determine the purpose and objectives of passage presentations. Depending on the grade level of the passage and the school's mission, they identify what students will focus on in their presentation (e.g., work that demonstrates proficiency in core subjects; artistic, athletic, or technical accomplishments; service and leadership; growth in Habits of Character).

3. Teachers and leaders formulate a rubric and other guidance documents that convey the vision of student success in a passage presentation through the following actions:

Communicating Student Achievement (continued)

a. Determining whom the authentic audience for passage presentations will include (e.g., community members, board members, Crew mates)

b. Determining how passage presentations will be structured and what will be assessed

c. Determining how and when students will prepare for passage presentations and how information will be communicated to families

4. Teachers support students to prepare for passage presentations well in advance of the event (often during Crew) by doing the following:

a. Supporting students to analyze their own portfolios and to identify quality evidence that demonstrates progress toward academic and character learning targets and readiness for passage

b. Helping students select and reflect on student work to showcase in their passage presentation

c. Making time for students to practice and receive feedback on presentation skills such as eye contact, effective communication of ideas, use of technology, and presenting evidence to support their statements

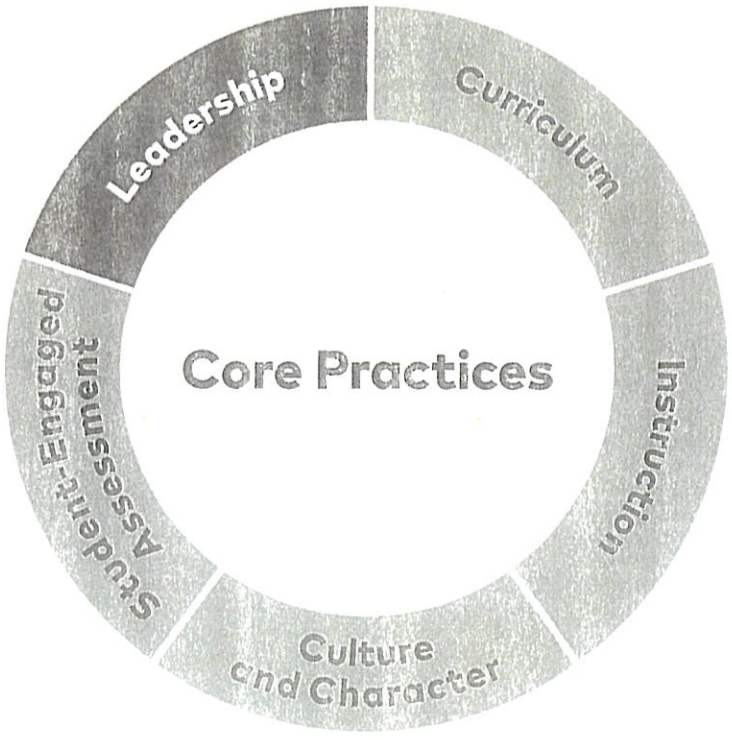
Leadership

EL Education supports school leaders to build a cohesive school vision focused on EL Education's Three Dimensions of Student Achievement, continuous improvement, and shared leadership. They align resources and activities to the school's vision and lead a professional culture with a growth mindset. Leaders shape school structures to provide equitable education to all students, celebrate joy in learning, and build a schoolwide learning community of trust and collaboration. Leaders work collaboratively with families, staff, and students to make evidence-based decisions that enable all students to achieve.

Note: "School leaders" in this section refers to principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in executive or supervisory roles.

Core Practices in This Domain

- Fostering a Cohesive School Vision
- Leading Evidence-Based Strategic Improvement
- Cultivating a Positive Professional Culture
- Promoting Shared Leadership
- Leading Professional Learning
- Ensuring High-Quality Instruction



Core Practice 32

Fostering a Cohesive School Vision

In the EL Education model, leaders unite staff, students, and the broader community around an inspirational vision of student success rooted in EL Education's Dimensions of Student Achievement: mastery of knowledge and skills, character, and high-quality student work. This vision transforms schools into places where students and adults engage in purposeful, challenging, and joyful learning. School leaders align resources to support all domains of the school—Curriculum, Instruction, Culture and Character, Student-Engaged Assessment, and Leadership—to this vision.

Note: "School leaders" in this section refers to principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in executive or supervisory roles.

A. Creating and Aligning a Cohesive School Vision

1. School leaders engage multiple stakeholders in co-creating a shared vision for school success centered on challenging, engaging, and empowering all students. They develop a clear vision for what a graduate of their school will know and be able to do and the high-quality teaching and learning that will produce these outcomes. They ensure that student achievement across EL Education's Dimensions of Student Achievement lives at the heart of the vision.
2. School leaders articulate an explicit and firm commitment to ensuring equally high learning outcomes for all students regardless of background or identity (e.g., race, gender, socioeconomic status, linguistic heritage, physical or learning ability, immigrant status, religion, culture).
3. School leaders align all curriculum, policies, management structures, resources, decision-making processes, and other leadership actions to the vision.

B. Communicating and Engaging Others in the Vision

1. School leaders articulate how implementing EL Education Core Practices helps the school achieve its vision. They champion a school in which teachers can fulfill their highest aspirations and students can achieve more than they think possible.
2. School leaders continuously promote the vision to all stakeholders by communicating the characteristics of a graduate and why they are important. This includes the following actions:
   a. Articulating the vision to stakeholders in the course of formal and informal interactions
   b. Promoting the vision through family handbooks, faculty handbooks, the school website, social media, regular communications to staff and families, annual reports, and other communications for a variety of audiences
   c. Ensuring that the physical design of the school environment, including banners and informational displays in the school building and grounds, promotes the vision
3. School leaders work together with teachers and families to communicate to students the school's vision. Students can articulate their role as stewards of this vision.
4. School leaders inspire and amplify the enthusiasm and expertise of staff, families, and members of the community toward the shared vision. They give credit to others and celebrate the spirit and work of the school community in fulfilling the vision.

C. Aligning Human Capital to Fulfill the Vision

1. School leaders strategically define the roles and responsibilities of staff.
   a. Administrative leaders identify the professional knowledge and skills necessary to achieve the vision. They articulate and periodically revise job descriptions for all positions in the school.
   b. Administrative leaders allocate staff tactically and flexibly; they don't make assignments based simply on what's always been done. They analyze data to understand student learning needs and match responsibilities to roles so that workloads maximize impact on student learning and are equitable and manageable.
   c. Administrative leaders communicate supervisory relationships clearly through staffing models, organizational charts, and handbooks.
2. Administrative leaders recruit and hire staff to support the vision.
   a. Administrative leaders proactively recruit within and beyond the traditional applicant pool to select teachers

whose practice and experience are aligned with the school's vision and the EL Education model.

b. Administrative leaders recruit and select teachers who:

   i. Have experience or demonstrated commitment to raising student achievement; a belief in every student's capacity for leadership, critical thinking, and service; and the ability to form strong relationships with students and their families

   ii. View the cultural and linguistic backgrounds of their students as assets for teaching and learning and are committed to increasing their cultural proficiency in working with students from backgrounds different from their own

   iii. Are committed to professional learning, collaborative planning, and the common vision and mission of the school

3. Administrative leaders use clear protocols and processes in hiring. They involve other faculty members (and sometimes students, families and/ or community partners) through hiring committees, group interview processes, and other structures.

4. Administrative leaders require finalists for teaching positions to demonstrate their teaching proficiency (e.g., presenting sample curricula, facilitating a lesson with students or adults, sharing a portfolio of prior teaching experience).

D. Aligning Calendars and Schedules to Fulfill the Vision

1. School leaders design a yearlong calendar that maximizes learning time for both students and adults, as well as time for school events and traditions.

2. School leaders plan for significant professional learning required to implement or improve educational practices, including full professional learning days and/or summer institutes.

3. School leaders schedule opportunities for family engagement and participation in school traditions, leadership, and service. When scheduling events, school leaders are mindful of families' competing commitments. They strive to disrupt inequities in family involvement through thoughtful scheduling and outreach.

4. When necessary, school leaders advocate boldly and creatively with their district leaders or boards for more control over use of time to allow the EL Education model to be implemented with integrity (e.g., they negotiate exceptions to policies to allow for teacher professional learning, Crew, and student projects).

5. School leaders use the school's daily and weekly schedule as a significant lever for fulfilling the vision. They design a schedule that does the following:

   a. Cultivates a positive school culture by ensuring time for Crew, community meetings, and other culture-building routines

   b. Provides time for individual teacher planning time and common grade-level or subject area planning time, as well as professional learning

   c. Provides dedicated time for whole staff meetings, teacher leadership meetings, and meetings with parents or special education teams

   d. Allows for flexible, uninterrupted blocks of time that foster deeper learning, content-based literacy, project-based learning, fieldwork, and student presentations

   e. Allows for flexible grouping and gives all students access to a challenging, college-ready curriculum

      i. Any grouping for intervention is temporary and does not, by design, limit future opportunities or create differing levels of expectation. Tracking students by ability is not practiced in EL Education schools.

      ii. Exceptional learners, including students identified as academically gifted, students with disabilities, and English language learners, are taught in regular education classrooms to the greatest extent possible.

6. School leaders customize the school schedule to challenge and support all students.

E. Aligning the Budget to Fulfill the Vision

1. Administrative leaders regularly analyze existing budget allocations and make decisions to redistribute, eliminate, and/or expand allocations based on the learning needs of students. Students with the greatest needs receive the most support.

2. Administrative leaders develop budgets that support materials and resources for on-site professional learning and travel and registration costs for off-site learning.

3. School leaders allocate money to support intensive professional learning during school breaks and throughout the year.

4. School leaders allocate money to support the curriculum, including books and materials to support deeper learning.

5. School leaders allocate money to teachers and/or teams to support fieldwork, final products, culminating events, and collaboration with outside experts.

Core Practice 33

Leading Evidence-Based Strategic Improvement

In the EL Education model, school leaders carefully set priorities and then keep their focus squarely on those priorities until they are achieved. To do this, they engage their school community in a strategic improvement process that identifies a limited number of high-priority goals, strategies, and a clear timetable that will guide actions as they work toward the vision. Leaders then deliberately and creatively align available resources (people, time, money) to fulfill the vision.

Note: "School leaders" in this section refers to district leaders, principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in district, executive, or supervisory roles.

A. Developing a Strategy for Continuous Improvement

1. Administrative leaders partner with EL Education to develop a long-term plan for realizing the school vision through implementation of the EL Education model.
2. School leaders collaborate with EL Education coaches to create long-term goals and annual benchmarks aligned to EL Education's Dimensions of Student Achievement and grounded in baseline data. They make time for regular meetings and check-ins with EL Education coaches.
3. School leaders engage a range of stakeholders in a collaborative process to design a strategy or work plan driven by data analysis. They select a few high-leverage improvement efforts that—if effectively supported—will lead to the greatest amount of growth in student achievement.
4. School leaders align time, resources, and personnel to achieve the priorities included in their work plan. They regularly gather and analyze data that enable them to make minor course corrections as they implement the work plan throughout the school year.
5. Administrative leaders monitor school improvement progress at strategic intervals throughout the year. The strategic improvement cycle includes:
    a. Development of a work plan based on long-term goals and annual priorities
    b. Midyear review of progress toward annual priorities
    c. End-of-year assessment of progress, including completion of the EL Education Implementation Review
    d. Goal-setting and creation of a work plan for the next school year
6. School leaders share the annual priorities and associated work plan with their staff members and other stakeholders. They ensure that staff members understand their roles and responsibilities in meeting the annual priorities.
7. School leaders ensure that all initiatives are aligned with their annual work plan goals and strategies and that annual plans continue to align with long-term goals and benchmarks. They leverage the work plan to decline initiatives that are not connected to agreed-upon goals.
8. School leaders use feedback from EL Education coaches along with other sources of evidence to assess leader and teacher growth and to inform the development of the following year's work plan and school improvement priorities.
9. School leaders selectively archive evidence from EL Education's Dimensions of Student Achievement (mastery of knowledge and skills, character, high-quality student work) in order to identify and assess the impact of implementing EL Education practices on student achievement across all three dimensions.

B. Managing Change throughout the Improvement Process

1. School leaders learn about change management. They reflect on how their own leadership actions and style support staff through the change process.
2. School leaders manage the improvement process proactively. They anticipate challenges and regularly analyze and resolve barriers to change.
3. School leaders seek to understand the dynamics of change by listening deeply and considering the needs and voices of all members of their school community.
4. School leaders regularly assess the professional learning

needs of the faculty and take action to address observed gaps.

5. School leaders regularly assess whether resources for instruction, learning, and operations are adequate and take action to address observed shortages.
6. School leaders ensure that there are clear action plans for change initiatives, with defined roles, responsibilities, and timelines.

C. Using Data to Improve Instruction

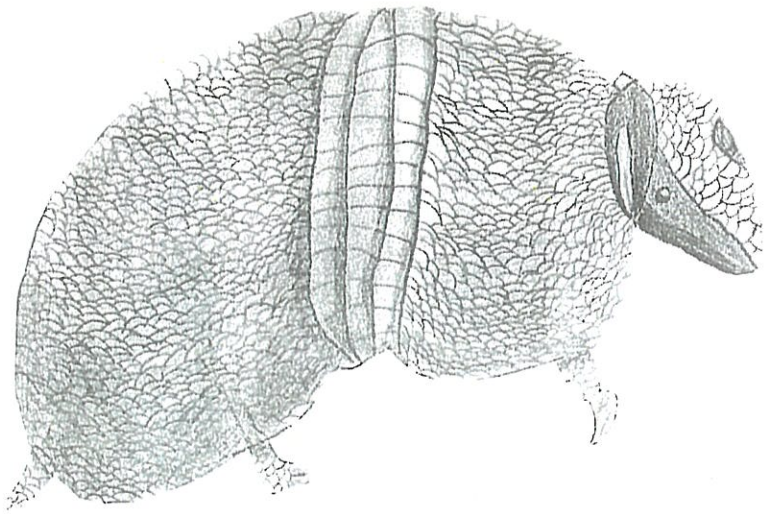
1. School leaders establish a clear, consistent, no-blame strategy for using data to analyze student achievement across EL Education's Dimensions of Student Achievement and to address gaps and inequities the data reveal.
2. School leaders develop organizational structures that are consistent with strategies intended to address gaps and inequities.
3. School leaders themselves engage in ongoing data analysis, discussion, and reflection that informs their decisions. They select and analyze data for patterns that provide evidence for claims about student achievement.
4. School leaders provide time and resources for teachers to collaboratively analyze data and to make critical evidence-based decisions.
5. School leaders and teachers monitor data to identify and address patterns of inequity. They take responsibility for increasing the achievement of all students through the following actions:
    a. Disaggregating and examining student achievement by a range of demographic groups, including gender, race, socioeconomic status, language-learner status, and special education status
    b. Looking for patterns of disproportionate representation of any particular group
    c. Examining practice to identify unconscious biases and designing systems to reduce the effects of these biases (e.g., blind grading, choosing students randomly using popsicle sticks, sometimes called "equity sticks")
    d. Identifying short-term interventions to ensure that every student's needs are met
    e. Designing long-term action plans that proactively ensure all students meet or exceed standards and that decrease the need for reactive remediation
6. School leaders support the collection of high-quality evidence from multiple data sources for each of EL Education's Dimensions of Student Achievement. Evidence recommended on the EL Education Implementation Review rubrics includes:
    a. Mastery of knowledge and skills:
        i. School progress reports
        ii. Interim assessments (e.g., NWEA Measures of Academic Performance)
        iii. Standardized tests (local, state, and national)
        iv. Performance or on-demand assessments
        v. Representative collections of student work samples
        vi. Classroom observations
        vii. Postgraduation performance indicators (e.g., college acceptance, college readiness assessments)
    b. Character
        i. Surveys completed by staff or students
        ii. Attendance, attrition, promotion, and graduation records
        iii. Discipline records
        iv. Measures of student engagement and motivation
        v. Summaries of schoolwide Habits of Scholarship/ Habits of Character data
        vi. School climate surveys
        vii. Random and representative classroom and hallway observations
    c. High-Quality Student Work
        i. Expedition products
        ii. Random and representative samples of daily work, project work, student portfolios
        iii. High-Quality Work Protocol summary
7. School leaders select and employ appropriate technology to support data collection and storage so that they have access to data in formats that are easy to interpret, analyze, and act upon.
8. School leaders organize data displays that facilitate analysis by a variety of stakeholders. Data is presented so that it can be analyzed effectively and efficiently.
9. School leaders facilitate evidence-based conversations with teachers, families, students, and other stakeholders to foster inquiry, problem solving, and collective ownership of student success.
10. School leaders make current data available to stakeholder groups in a timely fashion while that data is still relevant and helpful.
11. School leaders use evidence to tell their school's story, spearhead change, and allocate resources.

D. Building Staff Capacity for Using Data

1. School leaders invest in the capacity of every teacher to access, understand, and use data effectively. They provide ongoing professional learning focused on analyzing multiple types of data and properly interpreting results.
2. School leaders and teachers share accountability for results in a culture that focuses collaboratively on solutions rather than on placing blame for trends in student achievement.
3. Leaders develop protocols and norms that engage teachers in solution-oriented, evidence-based conversations.
4. Leaders model and hold teachers accountable for using evidence to make decisions about improvements in instruction.

E. Engaging the School Community and Other Stakeholders with Data

1. School leaders facilitate evidence- and data-informed conversations with families and other stakeholders to foster inquiry, problem solving, and collective ownership of student success.
2. School leaders support collection and shared analysis of data about community engagement. They use multiple sources of evidence (e.g., student and family satisfaction surveys, volunteer logs, community attendance at school events).
3. School leaders support the collection and shared analysis of data about organizational performance. They use multiple sources of evidence (e.g., enrollment patterns, budget targets, resources and fundraising, and staff recruitment, retention, and satisfaction).
4. School leaders use data to tell their school's story, spearhead change, and allocate resources. They make current data available to stakeholder groups in a timely fashion while the data are still relevant and helpful.



Core Practice 34

Cultivating a Positive Professional Culture

In the EL Education model, leaders cultivate a professional culture among adults that parallels the empowering culture they foster for students. (See also *Core Practice 23: Building the Culture and Structure of Crew.*) School leaders build trust so that educators can take risks, show vulnerability, and explore new practices that lead to increased student achievement. School leaders support this growth-oriented and impact-focused professional collaboration by creating professional communities where adults bring their whole selves to work and where they continually improve their ability to work productively with each other. This means leaders invite and facilitate honest, direct feedback, and, when needed, candid and courageous conversations. They prioritize growth more than the status quo and implement an asset-based orientation toward all members of the school community. School leaders embody the school's values and exemplify the positive and professional character they want all staff to demonstrate. Leaders foster an environment where all staff members feel safe, valued, and productive in a culture that respectfully challenges them to do more than they think possible.

Note: "School leaders" in this section refers to district leaders, principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in district, executive, or supervisory roles.

A. Promoting Trust

1. School leaders model fair and equitable behaviors toward staff that foster trust among all staff members. Such behaviors include:
   a. Respectfully and genuinely listening to and valuing the opinions of others in the discourse of the school
   b. Demonstrating personal regard for others and acting with awareness of others' sense of vulnerability
   c. Demonstrating competence in executing their formal responsibilities
   d. Speaking and acting with integrity; following through on commitments
2. School leaders model a growth mindset and professional courage by taking risks in public to try new things, listen to different opinions, own their mistakes, and be explicit about their own growth and revision.
3. School leaders and staff deliberately use structures that foster trust among colleagues. (See also *Core Practice 23: Building the Culture and Structure of Crew.*) Actions that foster trust include:
   a. Establishing and following decision-making models
   b. Establishing norms and reflecting on them regularly
   c. Using protocols to ensure that all voices are heard
   d. Holding space for concerns, questions, and disagreement
   e. Creating and following meeting agendas
   f. Documenting and following up on decisions
4. School leaders share ownership of successes, challenges, and change initiatives. They recognize and appreciate all members of the school community as important actors in the work of improving the school.

B. Establishing a Growth-Oriented Professional Culture

1. School leaders cultivate a culture in which all members of the school community embrace continuous learning and constructive feedback as an investment in their own and the school's success.
2. School leaders use formal structures (e.g., surveys) and informal conversations to invite feedback about their leadership style and actions from other staff, including those they supervise.
3. School leaders champion a growth-oriented professional culture schoolwide through the following activities:
   a. Embodying and celebrating the values of their school through their daily words and actions, displays and materials related to the school vision, and community meetings and public events
   b. Devoting time and attention to developing and maintaining systems and structures that support transparent and positive school culture (e.g., establishing staff Crews, coaching and evaluation systems, teacher appreciation traditions)
   c. Modeling and promoting EL Education traditions such as opening readings, team-building activities, and staff and student recognition for achievement and acts of character

4. School leaders foster a school culture in which all staff members embody the school's Habits of Character in their words and actions. Leaders do this through modeling, verbalizing the impact of positive behaviors, and providing regular opportunities for staff to self-assess and reflect upon the adult community's adherence to the norms.
5. Colleagues hold each other accountable to following school norms, and leaders address violations directly and constructively when needed.
6. School leaders expect all staff members to take responsibility for all students, not just the ones they interact with regularly. All staff members hold all students accountable for demonstrating Habits of Character in hallways and common spaces and during school-sponsored events off the school grounds.

C. Demonstrating a Commitment to Diversity, Equity, and Inclusion

1. School leaders demonstrate an explicit commitment to diversity, equity, and inclusion in the following ways:
   a. Embracing diversity of all forms as an asset for learning both in the classroom and the school community
   b. Engaging themselves and others in critical reflection on the ways power and privilege affect their lives and the lives of students and families in their school in relation to class, race, gender, language, and other aspects of background and identity
   c. Establishing structures and systems that ensure high levels of student achievement for all students and narrow the opportunity gap for historically underserved groups
   d. Establishing and maintaining an inclusive and welcoming environment for all students and staff members through public displays, communications, traditions, and other practices
   e. Refuting intolerant statements directed at individuals or groups and helping the learning community to respond appropriately when such statements occur
2. School leaders and all staff members discuss students and their families respectfully and as confidentially as the context requires. Their words and actions demonstrate an asset-based view of students and families, a commitment to inclusion, belief in all students' capacity to succeed, and a consistent problem-solving orientation.

D. Cultivating Emotional Intelligence

1. School leaders demonstrate an accurate awareness of their strengths and limitations and a growth mindset in the pursuit of learning. They believe that with effort, they can succeed in achieving their goals. Their words and actions support all members of the school community to do the same.
2. School leaders productively manage their emotions, including responding to stress, controlling impulses, and engaging in self-discipline and time management in order to complete tasks and pursue personal goals. They manage their responses to disappointment, challenges, and criticism with a mindset that fosters growth. They expect and support others to productively manage their own emotions as well.
3. School leaders are able to consider the varied perspectives of the full range of stakeholders in their school community. They demonstrate reflective listening and empathy by naming and acknowledging these perspectives. They deliberately coach staff members to do the same.
4. School leaders reflect openly on successes and setbacks in order to learn from them productively. They provide structured opportunities and scaffolding for others to do the same.

Core Practice 35

Promoting Shared Leadership

In the EL Education model, leadership is a collaborative, dynamic effort toward a common vision for teaching and learning. Thus, in addition to creating the conditions for all staff to learn, school leaders create the conditions for all staff to lead. Leaders articulate and uphold clear decision-making processes, as well as roles and responsibilities for decisions that impact the learning community. Leaders strategically build the leadership capacity of others; they set up structures for staff and other members of the school community to take responsibility for school improvement efforts and empower these individuals to lead the work. High-functioning, data-informed, impact-oriented teams of educators drive improvement across the school.

Note: "School leaders" in this section refers to district leaders, principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in district, executive, or supervisory roles.

A. Developing an Instructional Leadership Team

1. Administrative leaders establish an Instructional Leadership Team (ILT) whose charge is to increase the learning and engagement of every student across EL Education's Dimensions of Student Achievement.
2. The ILT includes representatives of multiple stakeholder groups, including administrators, classroom teachers, and specialists. The team is typically limited to 10 or fewer members, providing balanced perspectives and expertise, but not necessarily representing every team or stakeholder group.
3. The ILT meets at least monthly and typically more frequently.
4. The ILT leads an ongoing school improvement process at the macro level, with attention to the five domains of schooling: curriculum, instruction, assessment, culture and character, and leadership. The ILT does not address non-instructional school improvement efforts (e.g., facilities, fund-raising events). The ILT's efforts are deeply aligned to the school's work plan. (See also *Core Practice 33: Leading Evidence-Based Strategic Improvement.*) The ILT's actions include:
    a. Regularly monitoring student achievement across EL Education's Dimensions of Student Achievement
    b. Monitoring progress on school goals and benchmarks
    c. Analyzing data relevant to student achievement, including data about instructional practice, school culture, and family involvement
    d. Identifying grade levels, subgroups, and/or disciplines that need additional support
    e. Adjusting the school work plan to respond to current data by making course corrections (e.g., professional learning, changes to instruction or other programs, improvements in schedules) designed to result in student achievement
    f. Recommending resources to best support student achievement

B. Establishing and Supporting Teams Focused on Impact

1. School leaders facilitate the formation of additional teams as needed, whose work parallels the work of the Instructional Leadership Team at a micro level. These teams analyze specific subsets of data and lead improvement for grade levels, subject areas, or specific subgroups of students (e.g., multitiered system of support teams).
2. Team leaders use evidence of student learning across EL Education's Dimensions of Student Achievement to shape improvement initiatives. Ongoing team practices include:
    a. Collaboratively analyzing data from formative and summative assessments, as well as student work, and discussing the implications for instructional practices, assessment design, and student performance
    b. Analyzing assessment results for individual students, subgroups, and classes
    c. Creating action plans that articulate steps teachers will take to increase student achievement (e.g., improving teaching strategies, re-teaching, tuning the curriculum, implementing academic interventions)
    d. Regularly reassessing and revising action plans based on new data

Promoting Shared Leadership (continued)

C. Building the Capacity of Others to Lead

1. School leaders provide opportunities for faculty to develop leadership through authentic practice (e.g., leading teams, committees, professional learning, whole-school celebrations, family events).
2. School leaders model and coach team leaders to thoughtfully plan and facilitate meetings that maximize the effectiveness of their teams. They encourage the following practices:
   a. Building a strong team culture in which members are invested in collective student achievement and in each others' professional growth
   b. Using tools such as agendas and protocols that foster productive, collaborative inquiry focused on teaching and learning
   c. Prioritizing student learning over adult preferences
   d. Documenting discussion and decisions made during meetings
   e. Holding each other accountable for following group norms and following through on team commitments
3. School leaders provide professional learning focused on leadership skills.
4. School leaders sometimes provide release time or stipends that incentivize teachers to lead.
5. School leaders give those who are learning to lead helpful and specific feedback designed to improve their leadership practice.

D. Supporting Shared Decision-Making

1. School leaders articulate and publicly share the decision-making model that describes the kinds of decisions to be made in any given situation and identifies who is responsible for making each kind of decision. Whenever possible, they empower teachers to take the lead in decisions that directly impact teachers and students.
2. School leaders proactively consult teachers and parents on important school concerns and seek diverse perspectives on issues when they are the sole decision maker.
3. Leaders promote opportunities for discussion and debate about initiatives that impact teaching and learning; following those discussions, staff members uphold the decisions and implement action plans made by school leaders.
4. School leaders establish systems for monitoring and supporting the work of teacher- or family-led teams or committees and for communicating and coordinating the decisions and actions of various teams.

Core Practice 36

Leading Professional Learning

School leaders using the EL Education model respect teachers and other staff members as creative agents in their classrooms and as professionals continually seeking to improve their craft. The EL Education model supports leaders to demonstrate a growth mindset and a commitment to continuous professional learning in themselves and all faculty members. School leaders build capacity in teachers in order to improve student achievement and to sustain teacher commitment, motivation, retention, and performance. Leaders establish and communicate high expectations for learning in the classroom. They conduct classroom learning walks to ask "what's working?" and use evidence from their observations to inform professional learning, formal coaching cycles, and evaluation systems. They conduct regular walk-through observations to assess whether professional learning is being applied effectively and continually improve professional learning systems to impact student achievement.

Note: "School leaders" in this section refers to district leaders, principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in district, executive, or supervisory roles.

A. Creating a Culture of Adult Learning

1. School leaders model being "lead learners" by engaging in on-site and off-site professional learning to ensure the school's success. They participate fully in professional learning led by other staff members or EL Education coaches.
2. Administrative leaders maximize resource allocation for professional learning, including time, space, salary, and training for instructional coaches and other non-classroom positions that enhance teacher learning and build greater capacity for implementation.
3. School leaders align professional learning with the goals and strategies identified by the instructional leadership team as ones that will lead to increased student achievement.
4. School leaders ensure that all staff members participate in professional learning appropriate to their professional goals and aligned with the school's work plan. They document participation as necessary to fulfill teachers' licensure and certification requirements.
5. Leaders and teachers reflect on, document, and celebrate their learning just as students do.

B. Providing High-Quality Professional Learning

1. School leaders assume primary responsibility for coordinating and, over time, facilitating on-site professional learning aligned with the EL Education model and the school's work plan and student achievement benchmarks. School leaders ensure that professional learning sessions are purposeful, deeply planned, timely, and applicable to faculty who attend.
    a. Professional learning is designed to improve educator practice and increase student achievement while accounting for the characteristics and needs of adult learners.
    b. School leaders model and encourage other facilitators to use EL Education professional learning and facilitation practices so that teachers experience the same kinds of challenging and engaging instruction they will use in their own classrooms.
    c. When appropriate, school leaders differentiate professional learning (e.g., by level of experience, subject area, role, or professional goal) in order to have the greatest impact on teacher practice and student achievement.
2. School leaders create multiple structures to provide consistent and frequent professional learning opportunities. These may include:
    a. On-site, job-embedded professional learning for all staff
    b. Differentiated professional learning sessions
    c. Off-site professional learning
    d. Book studies in which faculty read and discuss a professional text over several sessions
    e. Lesson studies in which faculty co-plan and teach a lesson, observe each other, and revise instruction based on their findings
3. School leaders identify faculty members who demonstrate a high level of success and engagement with the EL Education model. They encourage these individuals to share their expertise with the greater network through modeling, mentoring, presentation at conferences, and other opportunities.

C. Providing Frequent Descriptive Feedback

1. Teams of school leaders and teachers regularly conduct learning walks and walk-throughs in order to define and discuss the qualities of effective instruction. To that end:
   a. Learning walks are designed to ask questions (e.g., How are teachers using learning targets in their lessons?) that generate discussion and brainstorming about next steps for teacher learning or school improvement.
   b. Walk-throughs are designed to collect quantitative data on consistencies or quality of instruction across the school. The collected data is used to assess the effectiveness of professional learning and progress on school goals, not to evaluate individual teachers.
   c. Feedback from learning walks and walk-throughs is always aggregated and anonymous; it does not call out individual teachers.
   d. Following learning walks and walk-throughs, school leaders provide timely and specific written feedback describing their findings to the whole staff.
2. Administrative leaders conduct formal observations aligned with required evaluation tools and structures. Whenever possible, formal observations are conducted in a spirit of supportive collaboration toward growth. Observation for the purpose of evaluation is something done with teachers, not to them. (See also *Core Practice 37: Ensuring High-Quality Instruction.*)
3. School leaders supplement formal observations with informal, drop-in mini-observations.
   a. Mini-observations may be set up as lower-stakes visits focused on descriptive feedback as opposed to evaluative feedback.
   b. Mini-observations result in immediate feedback to teachers focused on instructional priorities and school goals.
   c. Leaders provide feedback that addresses strengths, as well as questions and suggestions.
   d. Leaders use mini-observations to identify methods of support and professional learning actions that will lead to individual teacher growth.

D. Coaching Teachers

1. School leaders determine schedules that allow all teachers, whether one-on-one or in small groups, to engage in non-evaluative coaching cycles with instructional coaches and/or EL Education coaches. Sustainable coaching is grounded by schoolwide structures and systems (e.g., peer observations, provision of substitutes to cover classrooms during coaching meetings).
2. School leaders prioritize which teachers receive coaching and determine the length of coaching cycles. They ensure a connection between the school's work plan and teachers' professional goals.
3. School leaders work with coaches to create a coherent system for instructional coaching that includes coaching cycles, documentation structures, and ways to assess the efficacy of coaching.
4. Coaches structure meetings with teachers to foster inquiry, dialogue, and incremental revision of a teacher's practice based on evidence. A coaching cycle typically includes the following elements:
   a. Goal setting that focuses on improving teacher practice and increasing student achievement
   b. Learning observations (sometimes videotaped)
   c. Data collection
   d. Collaborative lesson planning or teaching
   e. Reflection
   f. Revision of classroom practice
   g. Documentation of results supported by evidence
   h. Discussion of next steps, including targeted professional learning

Core Practice 37

Ensuring High-Quality Instruction

In the EL Education model, school leaders support teachers to use curriculum, instruction, and assessment practices that meet high standards for student achievement, including required district and/or state frameworks. School leaders engage teachers in a collaborative process for curriculum mapping that identifies assessments associated with standards-based learning targets. School leaders allocate the resources teachers need to provide the materials, accommodations, interventions, and extensions that ensure all students can and do access the curriculum. After putting adequate plans and resources in place, school leaders carefully and consistently monitor implementation of agreed-upon curriculum, instruction, and assessment through frequent classroom visits and feedback to teachers. Supervision and evaluation structures are designed to support teacher growth and learning while also maintaining high expectations for follow-through and instructional effectiveness.

Note: "School leaders" in this section refers to district leaders, principals, instructional coaches and guides, and teachers in leadership roles. "Administrative leaders" refers specifically to principals or leaders in district, executive, or supervisory roles.

A. Adopting Comprehensive Standards and Challenging Curricula

1. School leaders adopt academic standards based on state standards and college- and career-readiness indicators.
2. School leaders adopt or support teachers to design curricula aligned with standards that challenge, engage, and empower all students. (See also *Core Practice 1: Choosing, Adapting, and Enhancing Curricula.*)
3. School leaders create timelines and transition plans that allow time and provide resources for supportive professional learning when adopting new standards or new curricula.
4. School leaders support teachers in understanding the design of a curriculum in order to ensure readiness to teach it. Support for teachers includes the following:
    a. Assessing teachers' need for professional learning to support understanding and implementation of a new curriculum
    b. Providing professional learning to unpack a new curriculum so that teachers understand its design, purpose, and methodology
    c. Providing time and support for teachers to learn new content or instructional methods
    d. Providing ongoing support, feedback, and collaborative coaching as teachers implement a new curriculum
5. School leaders schedule time and establish a process for creating and annually reviewing curriculum maps, which act as the foundation for all planning, instruction, and assessment. (See also *Core Practice 2: Mapping Knowledge, Skills, and Habits of Character.*)

B. Aligning Curriculum, Instruction, and Assessment

1. School leaders provide dedicated time and guidance, as well as professional learning, for teachers to create instructional plans, including learning expedition overviews, project plans, assessment plans, and daily lessons.
    a. Leaders create schoolwide systems for archiving, revising, and sharing curricular plans.
    b. Leaders facilitate collaborative planning among teachers working on interdisciplinary or multidisciplinary curricula.
    c. Leaders create structures for new teachers to learn how to use the adopted curriculum with support from experienced teachers.
    d. Leaders provide professional learning and planning time for teachers to develop assessments aligned with standards and curriculum maps.
2. School leaders ensure that teachers have access to the instructional materials and resources necessary to implement the curriculum.
3. School leaders review teachers' instructional plans, provide feedback as appropriate, and/or create opportunities for colleagues to review and critique each other's plans for challenge, engagement, and impact.
4. School leaders acquire high-quality assessment tools aligned to required standards and standardized assessments and support teachers in using these tools to monitor student progress.

C. Balancing Support and Accountability

1. School leaders support teachers to challenge, engage, and empower students through deeper instruction. (See also *Core Practice 11: Delivering Effective Lessons.*)
   a. School leaders regularly review learning targets, classroom assessments, student achievement data, and other indicators of practice to assess whether curriculum and instruction is aligned with standards and is increasing student achievement.
   b. School leaders celebrate examples of positive classroom culture, well-designed curricula, and effective lessons and share these examples with others to replicate successful practice.
   c. School leaders frequently visit classrooms to observe teaching and learning in action and provide timely, descriptive feedback to support improvements in classroom culture and instruction.
2. School leaders engage the faculty in coming to agreement about schoolwide consistencies in instructional practice and classroom and schoolwide culture (e.g., posting a do-now to begin lessons, developing classroom norms, using respectful language in hallways). They hold staff accountable for following through on these agreements and also support creativity, innovation, and individual teaching styles.

D. Supervising and Evaluating Staff

1. Administrative leaders establish systems and structures for supervision that support staff to feel safe, valued, and productive as professional educators.
   a. Administrative leaders ensure that teachers know who supervises them and how to ask for clarification of policy, support, or assistance with immediate concerns.
   b. Administrative leaders intentionally seek to build positive relationships with those they supervise through regular one-on-one check-ins, informal communication, and frequent classroom visits.
   c. Administrative leaders consistently and positively collaborate with teachers they supervise to solve problems (e.g., scheduling, substitute coverage, tardiness, illness).
2. Regardless of whether the school uses a district-mandated staff evaluation instrument or one designed by the school, school leaders set goals with teachers, conduct observations, and provide feedback designed to help teachers improve and students to achieve. To the greatest extent possible:
   a. Evaluations are based on multiple observations or a compilation of evidence over the course of the school year.
   b. Staff members engage actively in their own evaluation process through self-assessment, setting goals, and gathering evidence that demonstrates their growth and achievement.
   c. Administrative leaders align their observation, data analysis, and feedback procedures with the evaluation instrument and staff members' professional goals.
   d. Administrative leaders act swiftly and in alignment with school policy to remove a staff member from the school if repeated efforts to address instructional quality concerns do not result in improved performance.

E. Using Data to Inform Supervision and Intervention

1. Administrative leaders meet individually with teachers to discuss evidence collected during informal and formal observations. These conversations are designed to provide a combination of support and accountability that fosters professional growth and meets the needs of students.
2. Administrative leaders and teachers discuss specific students who are not making expected growth in order to identify appropriate interventions or next steps. They work to meet the needs of all students and to ensure equity in the delivery of instruction and support services.
3. Administrative leaders use evidence from observations and dialogue with staff members to identify the best methods of support and to inform plans for professional learning focused on growth.
4. School leaders collaborate with teachers to disaggregate and analyze student achievement data in ways that help identify the factors influencing student performance. Data analysis is solution-oriented and avoids simplistic assumptions about causality.

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Appendix F6
EL Annual Reports

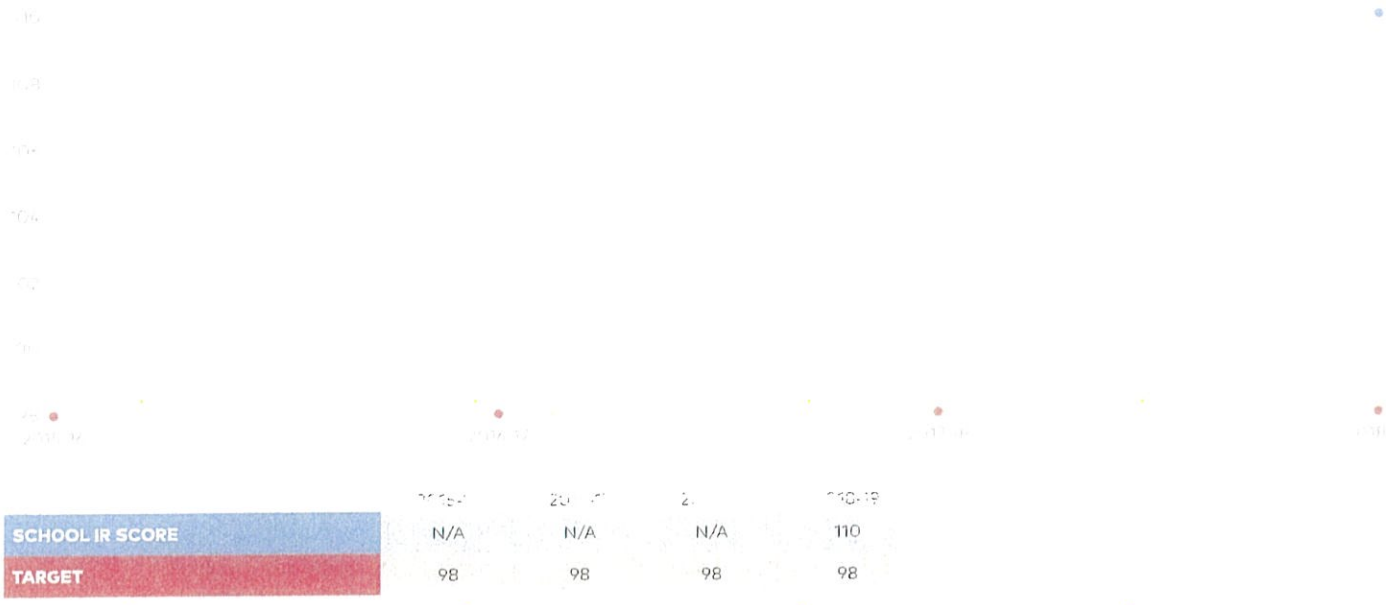
Partner Profile and IR Report

2018-19

Anser Charter School

Implementation Review

PROGRESS REPORT TOTALS



SCHOOL IR SCORE	N/A	N/A	N/A	110
TARGET	98	98	98	98

Partner Profile and IR Report

Anser Charter School

2018-19

GRADE CLUSTER

K-8

IMPLEMENTATION REVIEW SCORES IN 2018-19

EL Education

Dear School Staff,

The attached materials present the findings from the **Spring 2017** EL Education Implementation Review. The Implementation Review (IR) scores for your school have meaning locally and nationally, since the scores are standardized across the network. The IR is designed to help:

1. Determine the level of implementation of EL Education practices in your school and all EL Education schools,
2. Track growth of your school's implementation practices levels over time,
3. Provide standardized scores that allow individual schools and researchers to analyze the relationships between level of implementation and other outcomes (e.g. growth in achievement, engagement, motivation, etc.), and
4. Inform the work plan and professional development activities for your school and EL Education schools nationally.

While the official scores for your school are reflected in the School Designer score, school staff scores are analyzed as they provide a valuable and critical contribution to the validation of the instrument (so that there is independent confirmation that the instrument measures what it is supposed to measure).

The IR score is meant to be an accurate measure of the actual extent of implementation of 26 key EL Education practices in your school, called the EL Education *Power Practices*. The Power Practices are essential components of the EL Education model that are hypothesized to have an impact on student achievement either directly or indirectly. By establishing Power Practices, EL Education is not saying that anything in our Core Practices is unimportant; rather, we are attempting to prioritize those aspects of our design that we believe are most correlated with increased achievement.

Accompanying this letter are the following documents:

- Table of Scores – A numerical report showing Implementation Review scores for each power practice
- Chart of Scores – A bar chart showing Implementation Review scores for each power practice
- IR Progress Report – A visual report that indicates your school's overall raw score on a scale of targeted outcomes for schools by length of partnership
- An electronic copy of the Implementation Review Instrument

An important step to benefiting from these materials is to review each report carefully. The Individual School Chart provides a graphical view of the score report. The scores for each Power Practice correspond to the individual rubric in the IR Instrument, which is provided for your reference. Column 5 describes the exemplary implementation of that Power Practice, and School Designers and school leadership teams should use this column to inform implementation plans. For Power Practices that a school is not implementing at an exemplary level, the IR instrument and Core Practices can be used as tools to establish explicit goals for improvement.

The Progress Report provides an additional way of viewing your school's overall progress towards implementation of the EL Education design and IR target score. EL Education has identified IR score targets for each year of partnership, beginning with year 1 and ending with year 4 or beyond. This report displays a graphic showing your school's score in relation to its target score and last year's IR score (if applicable). The year 4 target score represents the threshold at which quality, school-wide implementation of the EL Education model can yield sustainable, long-lasting student achievement success. **Reaching the year 4 IR target is an eligibility requirement for becoming a Credentialed EL Education school.**

As you deepen your understanding of the Implementation Review instrument, we believe that you will gain new insight into the power of this instrument as it relates to achieving your school's goals and documentation of progress along the way. We appreciate your partnership and look forward to working with you to achieve your school's achievement goals through strong implementation of EL Education practices.

Respectfully,
The EL Education Implementation Review Research Team

EL Education

Anser Charter School

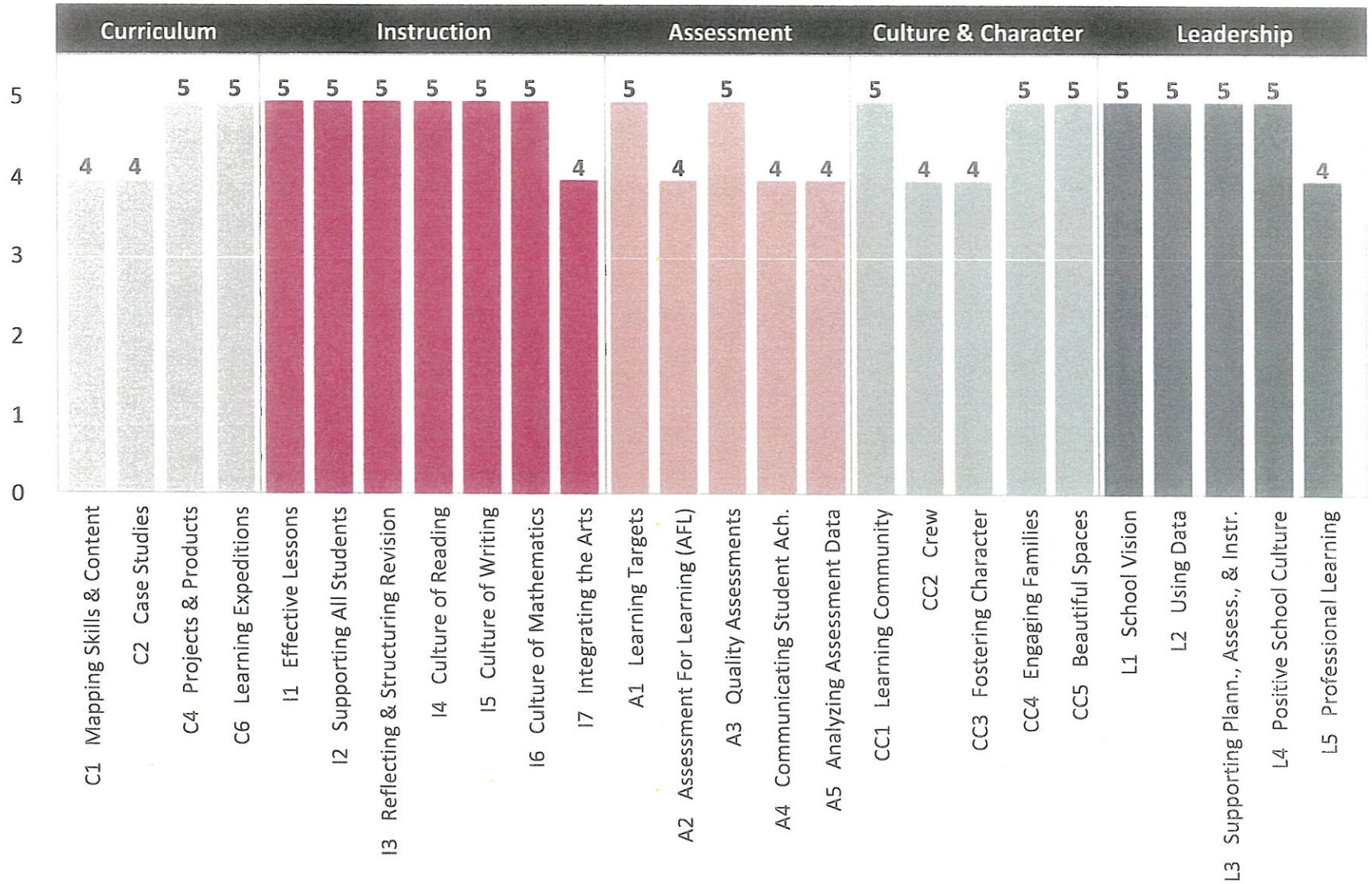
2017 Implementation Review Scores

Dimension	Practice	Score
Curriculum	1 Mapping Skills & Content	4
	2 Case Studies	4
	4 Projects & Products	5
	6 Learning Expeditions	5
Instruction	1 Effective Lessons	5
	2 Supporting All Students	5
	3 Reflecting & Structuring Revision	5
	4 Culture of Reading	5
	5 Culture of Writing	5
	6 Culture of Mathematics	5
	7 Integrating the Arts	4
Assessment	1 Learning Targets	5
	2 Assessment For Learning (AFL)	4
	3 Quality Assessments	5
	4 Communicating Student Achievement	4
	5 Analyzing Assessment Data	4
Culture & Character	1 Learning Community	5
	2 Crew	4
	3 Fostering Character	4
	4 Engaging Families	5
	5 Beautiful Spaces	5
Leadership	1 School Vision	5
	2 Using Data	5
	3 Supporting Planning, Assessment, & Instruction	5
	4 Positive School Culture	5
	5 Professional Learning	4

TOTAL SCORE:	121

Education

Anser Charter School | 2017 Implementation Review Scores

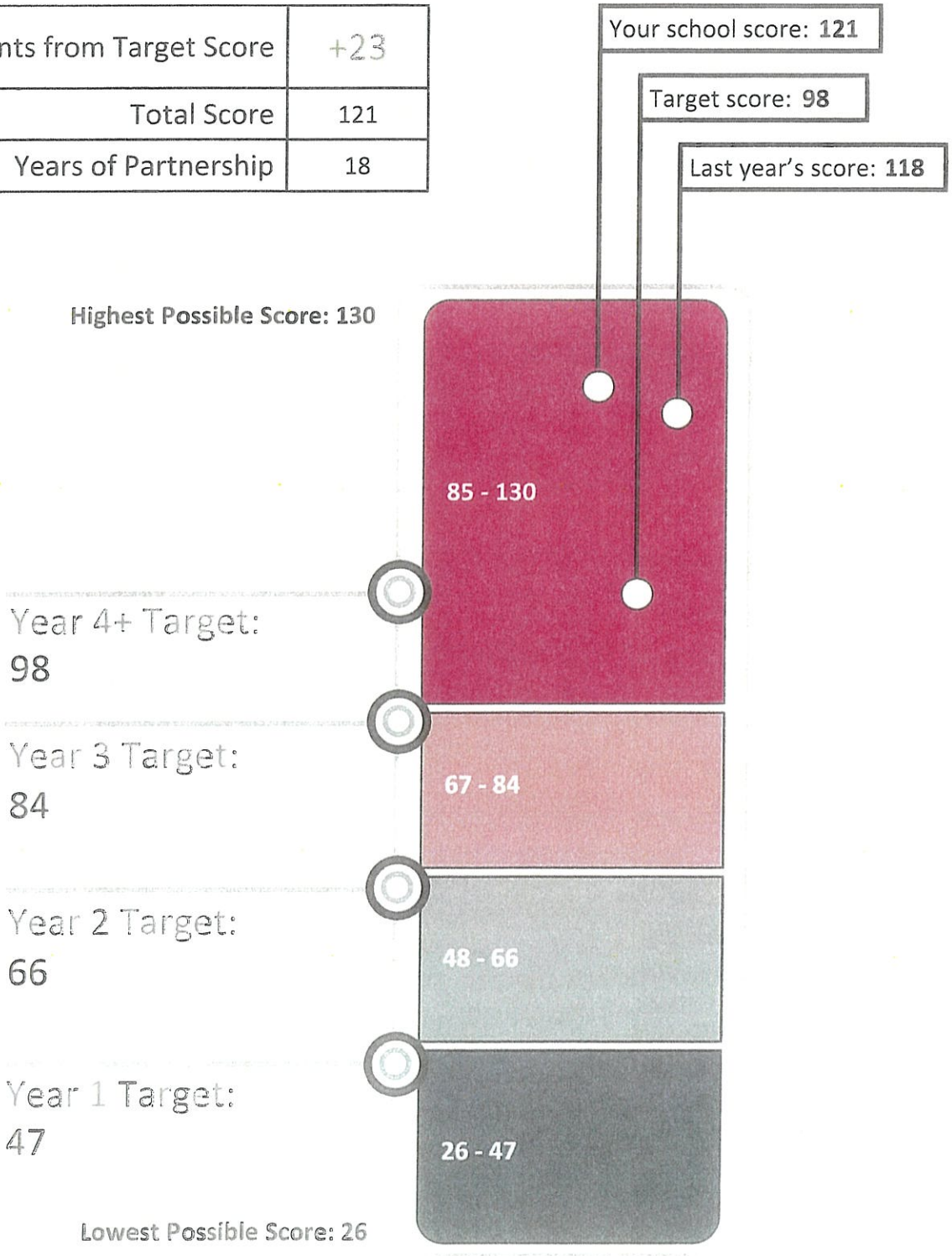


Education

Anser Charter School

2017 Implementation Review Progress Report

Points from Target Score	+23
Total Score	121
Years of Partnership	18



EL Education

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1. Determine the level of implementation of EL Education practices in your school and all EL Education schools,
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3. Provide standardized scores that allow individual schools and researchers to analyze the relationships between level of implementation and other outcomes (e.g. growth in achievement, engagement, motivation, etc.), and
4. Inform the work plan and professional development activities for your school and EL Education schools nationally.

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Respectfully,
The EL Education Implementation Review Research Team

EL Education

ANSER Charter School

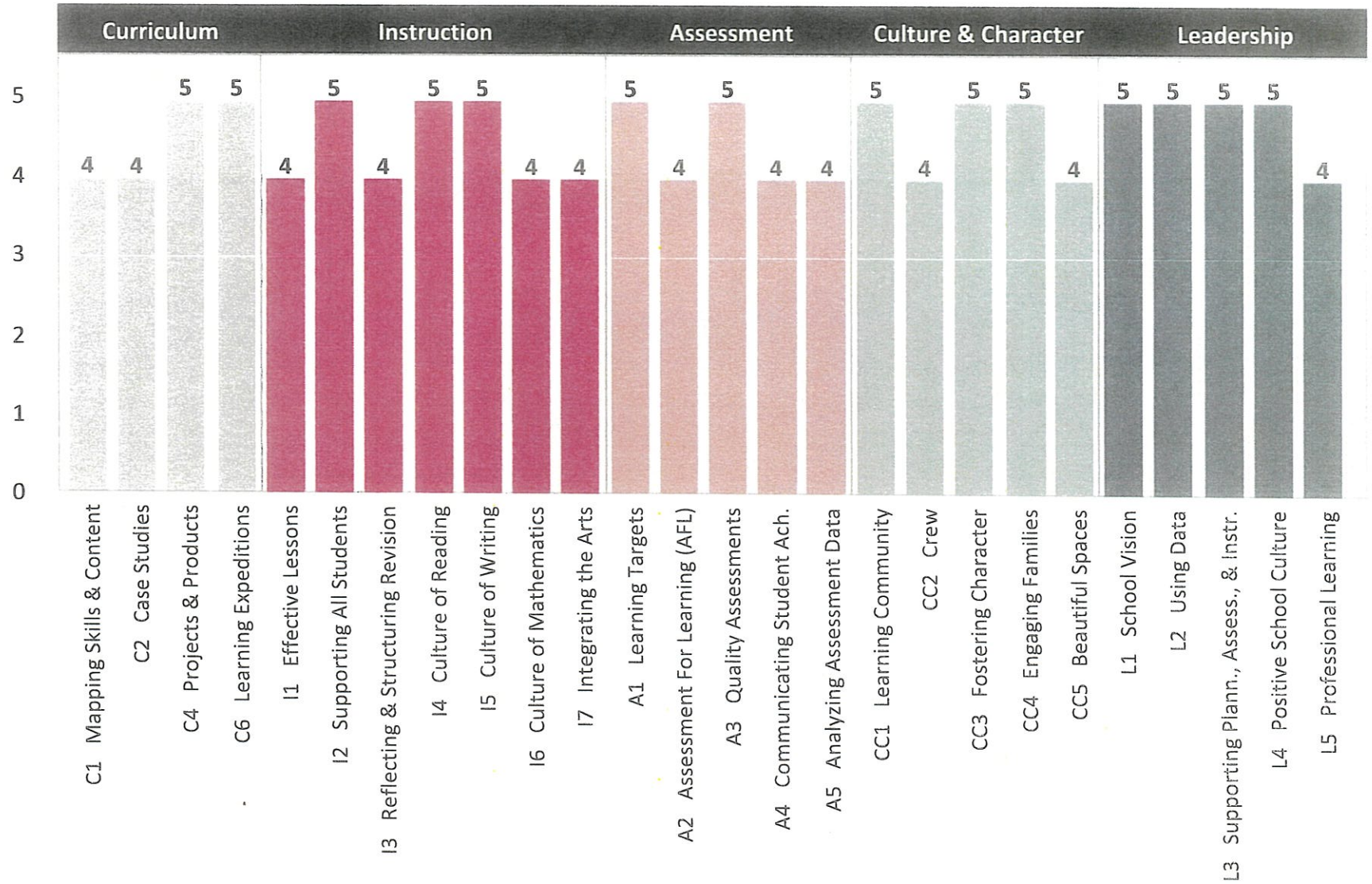
2016 Implementation Review Scores

Dimension	Practice	Score
Curriculum	1 Mapping Skills & Content	4
	2 Case Studies	4
	4 Projects & Products	5
	6 Learning Expeditions	5
Instruction	1 Effective Lessons	4
	2 Supporting All Students	5
	3 Reflecting & Structuring Revision	4
	4 Culture of Reading	5
	5 Culture of Writing	5
	6 Culture of Mathematics	4
	7 Integrating the Arts	4
Assessment	1 Learning Targets	5
	2 Assessment For Learning (AFL)	4
	3 Quality Assessments	5
	4 Communicating Student Achievement	4
	5 Analyzing Assessment Data	4
Culture & Character	1 Learning Community	5
	2 Crew	4
	3 Fostering Character	5
	4 Engaging Families	5
	5 Beautiful Spaces	4
Leadership	1 School Vision	5
	2 Using Data	5
	3 Supporting Planning, Assessment, & Instruction	5
	4 Positive School Culture	5
	5 Professional Learning	4

TOTAL SCORE:	118

Education

ANSER Charter School | 2016 Implementation Review Scores

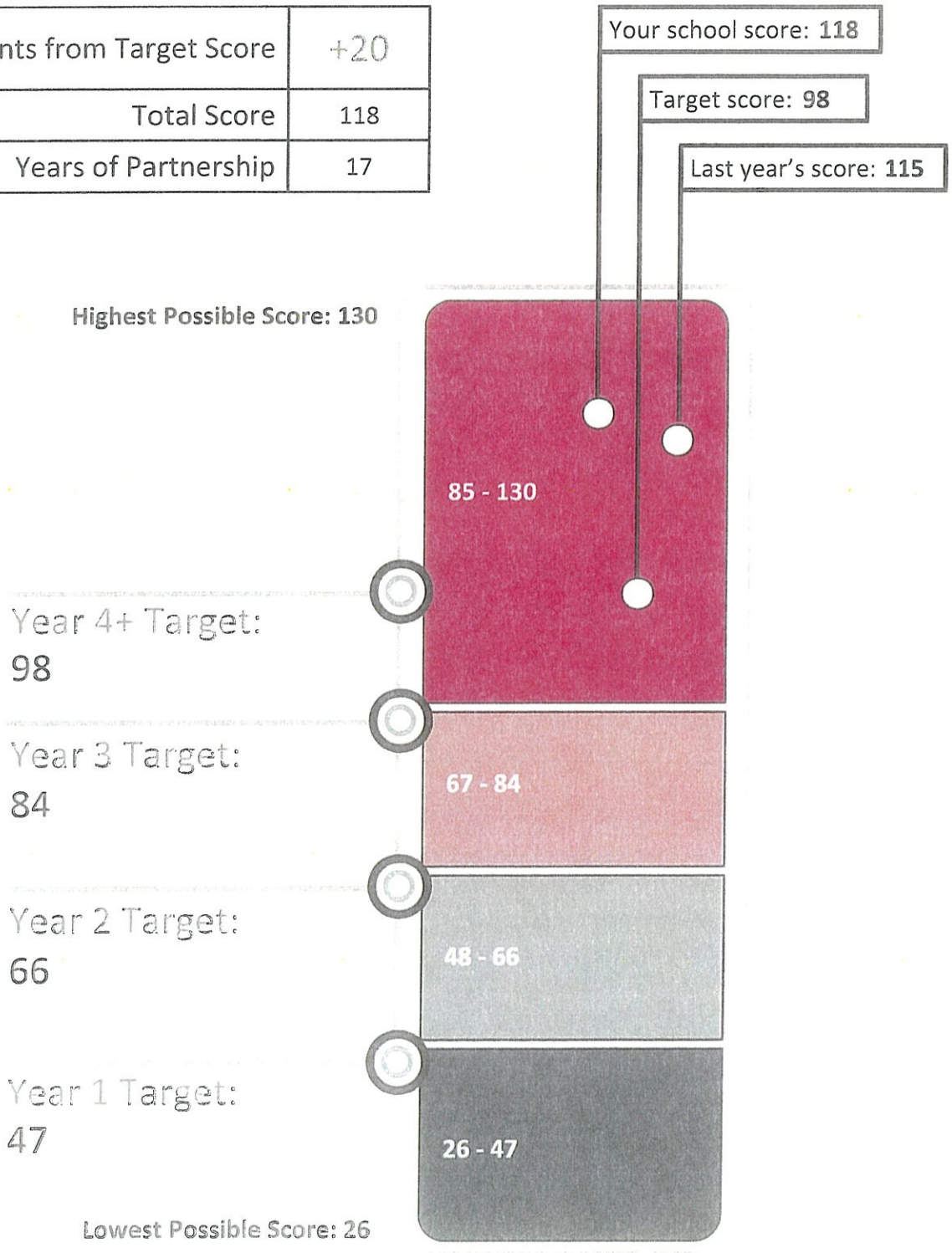


Education

ANSER Charter School

2016 Implementation Review Progress Report

Points from Target Score	+20
Total Score	118
Years of Partnership	17



Appendix F7
EL Design Principles

EL Education

Design Principles

EL Education is built on ten design principles that reflect the educational values and beliefs of Outward Bound. These principles also reflect the design's connection to other related thinking about teaching, learning, and the culture of schools.

1. The Primacy of Self-Discovery

Learning happens best with emotion, challenge and the requisite support. People discover their abilities, values, passions, and responsibilities in situations that offer adventure and the unexpected. In EL Education schools, students undertake tasks that require perseverance, fitness, craftsmanship, imagination, self-discipline, and significant achievement. A teacher's primary task is to help students overcome their fears and discover they can do more than they think they can.

2. The Having of Wonderful Ideas

Teaching in EL Education schools fosters curiosity about the world by creating learning situations that provide something important to think about, time to experiment, and time to make sense of what is observed.

3. The Responsibility for Learning

Learning is both a personal process of discovery and a social activity. Everyone learns both individually and as part of a group. Every aspect of an EL Education school encourages both children and adults to become increasingly responsible for directing their own personal and collective learning.

4. Empathy and Caring

Learning is fostered best in communities where students' and teachers' ideas are respected and where there is mutual trust. Learning groups are small in EL Education schools, with a caring adult looking after the progress and acting as an advocate for each child. Older students mentor younger ones, and students feel physically and emotionally safe.

5. Success and Failure

All students need to be successful if they are to build the confidence and capacity to take risks and meet increasingly difficult challenges. But it is also important for students to learn from their failures, to persevere when things are hard, and to learn to turn disabilities into opportunities.

6. Collaboration and Competition

Individual development and group development are integrated so that the value of friendship, trust, and group action is clear. Students are encouraged to compete, not against each other, but with their own personal best and with rigorous standards of excellence.

7. Diversity and Inclusion

Both diversity and inclusion increase the richness of ideas, creative power, problem-solving ability, and respect for others. In EL Education schools, students investigate and value their different histories and talents as well as those of other communities and cultures. Schools and learning groups are heterogeneous.

8. The Natural World

A direct and respectful relationship with the natural world refreshes the human spirit and teaches the important ideas of recurring cycles and cause and effect. Students learn to become stewards of the earth and of future generations.

9. Solitude and Reflection

Students and teachers need time alone to explore their own thoughts, make their own connections, and create their own ideas. They also need to exchange their reflections with other students and with adults.

10. Service and Compassion

We are crew, not passengers. Students and teachers are strengthened by acts of consequential service to others, and one of an EL Education school's primary functions is to prepare students with the attitudes and skills to learn from and be of service.

Appendix F8
EcoNorthwest Report

BLUUM

LET LEARNING GROW

Treasure in the Valley

Demographic Changes and New School Opportunities in Ada and Canyon Counties

MAY 2016

ECONorthwest
ECONOMICS • FINANCE • PLANNING

About ECONorthwest

ECONorthwest specializes in economic, planning, and finance with a deep knowledge of the public education sector. Established in 1974, ECONorthwest has over three decades of experience helping clients make sound decisions based on rigorous economic, planning and financial analysis.

BLUUM
LET LEARNING GROW

About Bluum

Bluum is a non-profit organization committed to ensuring Idaho's children reach their fullest potential by cultivating great leaders and innovative schools. We work to help Idaho become a national model for how to maximize learning opportunities for children. In partnership with the J.A. and Kathryn Albertson Family Foundation, Bluum plans to help create 20,000 new, high-performing school seats in Idaho in 10 years.

Produced with support from:

buildinghope

VECTRABANK COLORADO

Acknowledgements

We are grateful to the individuals and organizations that helped produce this report. Matthew Kitchen crunched the data and authored the report. We thank him, and his colleagues at ECONorthwest, for their expertise, thoughtful analysis, and willingness to collaborate throughout the process. We also want to thank Joe Bruno at Building Hope and Conrad Freeman at Vectra Bank for their support and encouragement in moving this project forward. Special thanks to the J.A. and Kathryn Albertson Family Foundation for their ongoing support and encouragement in not only issuing this report, but in supporting the effort to grow new high quality schools for Idaho's children. Idaho's future is brighter because of their efforts.

We would like to thank our fellow Bluum-ers Amy Russell, Suzanne Metzgar and Marc Carignan. Amy gave important feedback on drafts of the report and planned its formal release. Suzanne helped plan the event that preceded the release of the report, while Marc gave feedback and encouragement along the way.

This report makes use of a number of publicly available datasets including data from the 2000 and 2010 U.S. Census of Population, the American Community Survey, a compilation of building permit data assembled by the Community Planning Association of Southwest Idaho (COMPASS), population forecasts from COMPASS, and various data made available through the Idaho State Department of Education. The authors of this report are grateful for the assistance others provided, but all errors and omissions are our own.

The cover photo for this report was taken by Amy Russell. The maps developed for this report make use of a base layer designed by Stamen Design based on data from OpenStreetMap.

Map tiles by Stamen Design, under CC BY 3.0. Data by OpenStreetMap, under CC BY SA.

Treasure in the Valley:

Demographic Changes and New School Opportunities in Ada and Canyon Counties

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Foreword

Idaho's families and student demographics are changing. Not only is the state's total population growing (Idaho is the 10th fastest growing state), but Gem State families are increasingly urban, non-white and lower income. This was the big takeaway from the 2014 ECONorthwest report *Shifting Sands: Idaho's Changing Student Demographics and What it Means for Idaho*. That report confirmed what many of us who live in communities like Boise, Meridian, Twin Falls, Idaho Falls or Coeur d' Alene see daily as we pass new home construction sites, hunt for apartments, sit in traffic and watch new school buildings pop up like wild flowers.

Nowhere are these dynamics of growth more prevalent than in the Treasure Valley, the area of focus for this new report. Since 2000, the school-aged population in the Treasure Valley has grown by 39 percent (see **Table 1**). This is significant when you consider that the change in school-aged population has only increased by 12.8 percent in the entire state within the same number of years.

Table 1. Treasure Valley School-Age Population 2000-2014 and 2019 Projections

School Age Population	2000	2010	2014	Proj. 2019
White	76,533	98,520	100,056	100,100
Non-White	8,044	13,304	15,024	17,200
Two or More Races	3,168	5,874	6,827	8,000
All Races	**87,745**	**117,698**	**121,907**	**125,300**
Hispanic/Latino (all races)	10,369	21,020	23,552	26,700

Source: U.S. Census, ACS, Nielson and ECONorthwest

With this growth come challenges, but with the challenges also come tremendous opportunities. Specifically, Bluum is most interested in where new innovative schools (charter, district or even private) should be built and opened to best meet the needs of the areas' growing and increasingly diverse student demographics. Bluum, with the support of the J.A. and Kathryn Albertson Family Foundation, is committed to helping create 20,000 new, high-performing school seats, by 2024. We want to make sure that the new seats we advocate for are actually created in the communities with the greatest need and demand for better school options.

To help us figure all this out we went back to the crack research team at ECONorthwest. We asked their Project Director, and the author of the *Shifting Sands* report, Matthew Kitchen to build on the earlier work to help us begin to answer three essential questions specific to the Treasure Valley:

- Where can we expect to see the greatest growth in the pre-K-12 school-age population?
- Where are the highest concentrations of low-income and minority school-aged children?
- Where are current schools underperforming based on the students they serve?

We felt that if we could get insights to these questions we would have a better sense of where new schools in the Treasure Valley should be built. Of course, each school district in the Ada and Canyon Counties have similar studies of their own, which are valuable and important for their planning. But, we wanted to look at this as a regional issue rather than just a school district matter. We wanted this information for all school providers (district, charter and private) as well as for local community leaders, business leaders and others involved in growing and supporting schools and education programs.

Matthew Kitchen and his colleagues at ECONorthwest combined their skills and experience in urban planning and public education to look at demographic trends and school performance in the Treasure Valley. This new report, *Treasure in the Valley: Demographic Changes and New School Opportunities in Ada and Canyon Counties*, uses data from the U.S. Census and Community Planning Association of Southwest Idaho (COMPASS) to project the change of school-aged population through 2025. The ECONorthwest team also tapped the American Community Survey data to look at current concentrations of low-income, non-white, and Hispanic populations within the valley. And, the research team created a performance model from a combination of ISAT math scores and school-level demographics for district and charter public schools. The performance model reports how well each school does in comparison to an expected performance (see full report for notes on methodology).

In interrogating our three essential questions about student growth, school quality and change in the Treasure Valley, the research shows the following insights:

- The Treasure Valley saw overall student enrollment grow by nearly 12,000 students between 2010-2015. The region is expected to add another 3,400 students by 2019, and nearly 65 percent of these students will be from minority backgrounds.
- By 2019 it is projected that there will be a net increase of 9,000 households in the region earning less than $50,000 a year; half of those earning less than $25,000.
- Over 10,000 students in the Treasure Valley (about ten percent of K-12 students) attended schools in 2015-16 that performed significantly worse than expected on their math ISATs.
- "Hot spots" where the demand and need for new and better school options is greatest cross district and community lines within sections of Boise, Caldwell, Meridian, Nampa, and Kuna.
- Nampa is highlighted in our analysis as an area that could benefit significantly from new school investments and support. It is important to note, this has already begun with district innovations and new charter development.

Treasure in the Valley aims to help local education leaders, community leaders, businesses, and philanthropies support wiser and more strategic investments in schools. But, it also breaks new ground by using empirical data across two counties to site schools based on the needs of changing communities. As Idaho and other states, especially in the West, become less rural, more diverse, and more expansive with school choice policies research like this will continue to be needed. A new, high performing school targeted at a "hot spot" of student growth and educational need can make a sizeable difference for not only a community's families and children, but also to the overall economic and civic health of the community.

We hope this report can stimulate some important conversations and be a useful tool for everyone involved in designing the future of education in the Treasure Valley.

Angel Gonzalez, Director of Research
Terry Ryan, Chief Executive Officer

1. Introduction and Study Purpose

Bluum, with support from Building Hope and Vectra Bank, commissioned this study by ECONorthwest to understand how the Treasure Valley's changing demographics and housing growth present opportunities for creating innovative school options for the region's expanding and increasingly diverse student population.

With a high quality of life and strong economy, the Treasure Valley is growing. The Valley is host to one of the youngest urban populations in the U.S. And that population is getting increasingly diverse. The future of the Valley economy depends on successfully preparing tomorrow's workforce by educating today's youth. Idaho's school systems get below average marks[1] for student achievement, school finance, support for teachers and other indicators of a healthy education environment. And in the face of low graduation rates and district fiscal challenges many Idaho students and families are seeking enrollment in schools of choice—district public, charter public, and private schools that offer families education options outside of those bound by their neighborhood. Waiting lists for many of the highest quality charter schools have been growing. New school services are needed to provide a wider range of quality choices for parents and students, and to drive innovation across the education sector.

This study focuses on Idaho's most populous urban region, the Treasure Valley, and seeks to describe the current and expected future conditions that will help shape the demand for new school services and programs.

The goals of this study are to:

- Understand near-term trends in changing demographics of school-age children for Ada and Canyon counties.
- Identify "hot spots" in development and where demand for new school services may be greatest.
- Discuss school quality in these growth areas - how many students are attending low performing schools or could benefit from different school options?
- Discuss how the changing student demographics might be served by new school options.

For this project ECONorthwest has combined standard market research techniques with our deep knowledge of the public education sector and data sources in order to provide Bluum with an integrated set of information about the market potential for new school services in the Treasure Valley.

This report begins (**Section 2**) with a brief description of the changing demographic and economic environment in which school services are offered. This is the underlying case for new school investment. It then presents an approach to combining together a wide variety of different geographic measures into a single index of school opportunity (**Section 3**). The School Opportunity Index is a shorthand way of identifying and mapping locations where new school services might best be deployed in order to meet a variety of community and educational needs. The key factors involved relate to demands for new school services in three general categories:

1) the location of target populations,
2) the presence and growth in school-age populations, and
3) the location of students with unmet academic needs.

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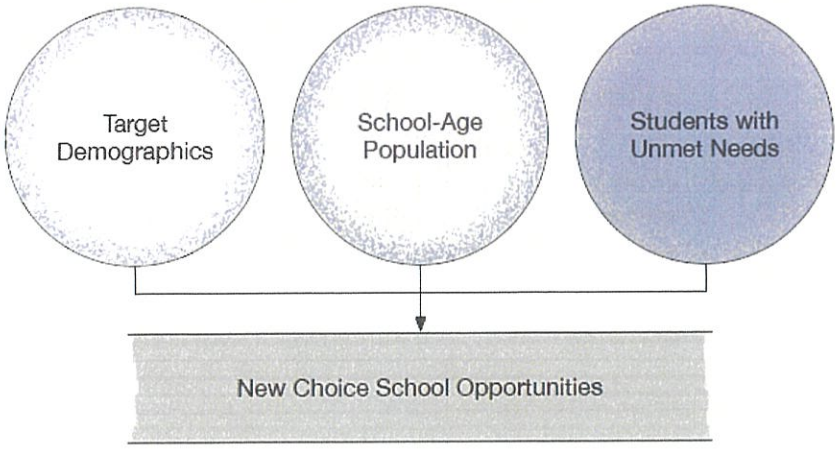
[1] Education Week. 2014. Idaho State Highlights: A special supplement to Education Week's Quality Counts 2014. Accessed May 10. http://www.edweek.org/media/ew/qc/2014/shr/16shr.id.h33.pdf.

Figure 1. Factors Influencing New School Opportunities



The report then examines more closely (**Section 4**) a number of specific measures across these categories that together constitute the school opportunity index. Then maps of localities are presented (**Section 5**) that depict school opportunity within individual communities. The report ends with some general conclusions and there is an Appendix that describes some technical methods.

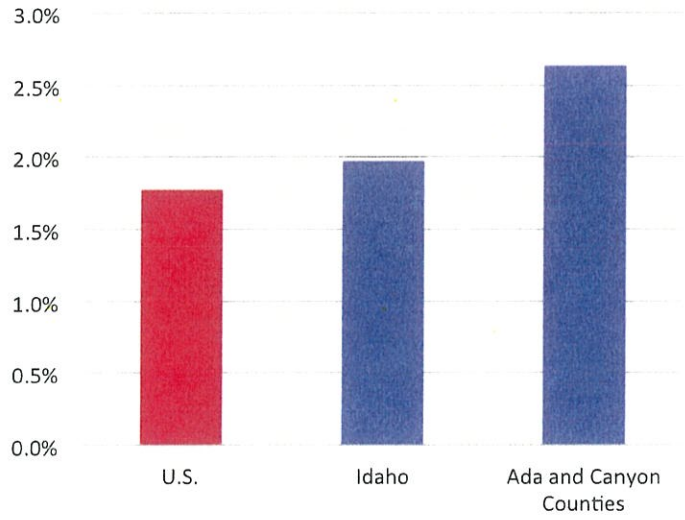
The report is intended as a tool for use by a broad set of stakeholders involved in school siting decisions. As is true of any tool, it has limitations and should be supplemented with local knowledge about student needs and school service delivery organizations' constraints and opportunities.

2. The Importance of New School Services

The Treasure Valley Economy is Growing

Since the recession the Treasure Valley has seen vigorous job growth, experienced a strengthening real estate market, and has one of the highest shares of population under-19 of any urban area in the U.S. The evidence for this growth is seen in crowded classrooms in a number of schools throughout the urbanized area[2]. Since the bottom of the recession employment growth in the Treasure Valley has outpaced the state and the rest of the U.S. economy (see **Figure 2**).

Figure 2. Employment Average Annual Growth Rates Since September 2010



Source: U.S. Bureau of Labor Statistics

Wage growth in the Boise area has also been strong since the recession (2.4% annual average), outpacing the state of Idaho (2.1%) and the U.S. as a whole (2.0%). Growth in jobs and income is evidence of a stable and expanding economy that has revived the area's housing market.

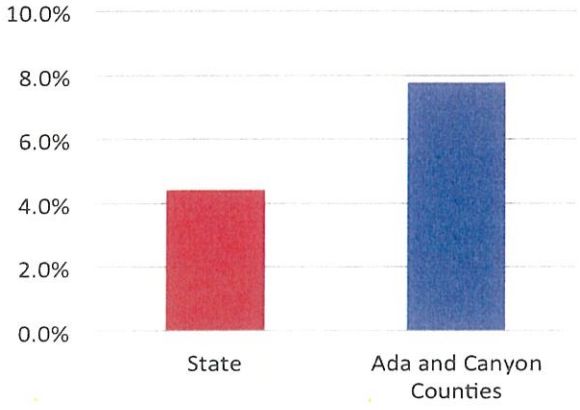
A Rebounding Housing Market

The Treasure Valley has experienced a substantial housing market recovery since the markets lost significant value during the sub-prime mortgage crisis and subsequent recession. In late 2006, just prior to the mortgage crisis average home values in some parts of Boise were at a high of between $150 - $190 on a square foot basis. Two years later values had dropped to between $100 - $150 per square foot. At the end of 2015 home values in these same parts of Boise had recovered to 95% of their pre-recession high. A similar pattern is seen throughout the Treasure Valley. Annual average growth rates for homes within the Treasure Valley measured since the bottom of the housing market (at the end of 2010) have been 7.7%. Annual average growth in home values for

[2] Richert, Kevin. 2015. "Districts Face Rising Enrollment Across Idaho." Idaho Ed News, September 3. Accessed May 10, 2016. http://www.idahoednews.org/news/across-idaho-districts-face-rising-enrollment/

all of Idaho during this period was 4.4% (**Figure 3** below) and was the 12th highest growth rate in home values amongst all states. The strong growth in home values in the Treasure Valley is an indication of the overall demand for housing resulting from a strong economy and a desirable local quality of life.

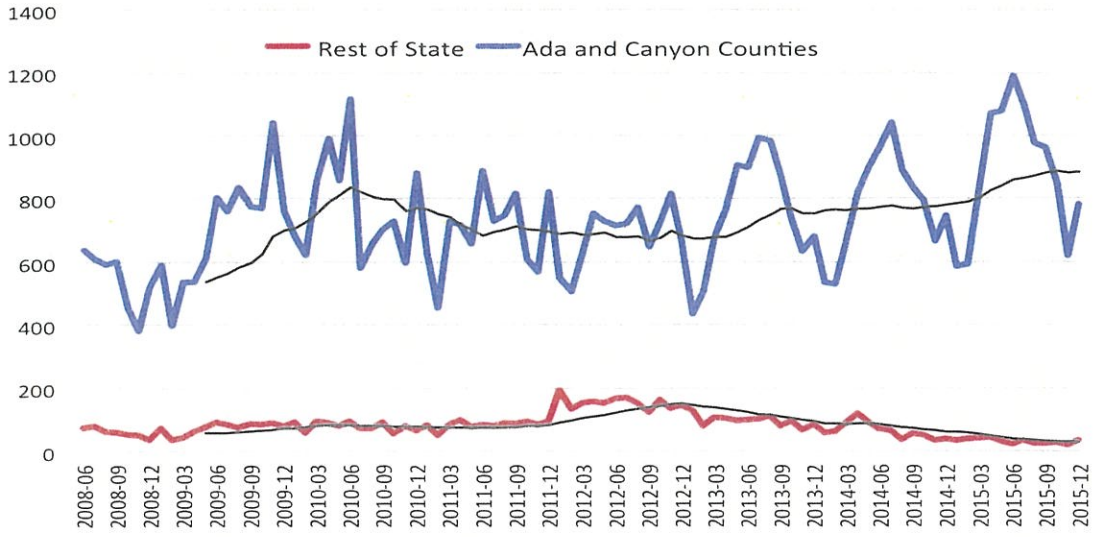
Figure 3. Annual Average Growth in Home Values on a Sq. Ft. Basis



Source: data from Zillow, ECONorthwest

The Treasure Valley comprises the largest housing market in Idaho. Monthly home sales date from Zillow demonstrates that the activity of this market has been increasing since the general collapse of the housing markets in 2007. **Figure 4** below displays monthly home sales and a 12-month moving average (black lines in graph) of sales for the region and the rest of Idaho. The dynamic nature of the growth in the market is demonstrated in growth in home sales volume that precedes the rest of the state, and that continues to be strong even as home sales volumes for the rest of the state have flattened. With an expanding residential market comes growth in families with school-age children, thus increasing school enrollments. This population growth is evident in recent census data and is expected to continue over the near-term.

Figure 4. Monthly Home Sales in the Treasure Valley and Rest of Idaho

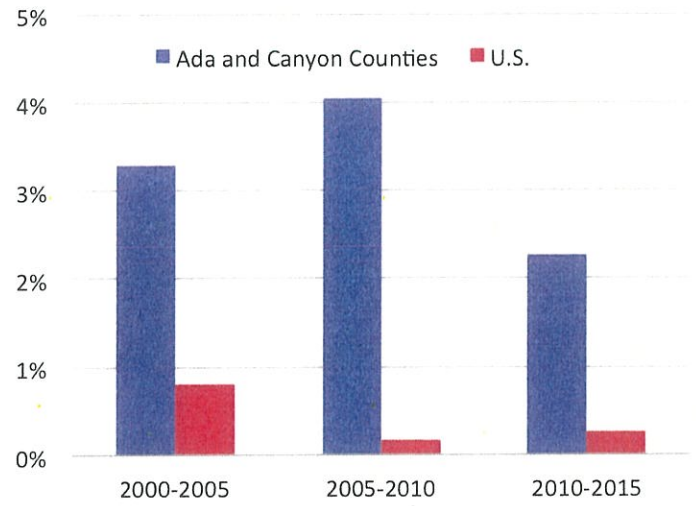


Source: Data from Zillow, ECONorthwest

Increasing School Enrollment

The number of students enrolled in public schools in the Treasure Valley region rose dramatically during the pre-recession period. And since 2010 enrollments have continued to increase. Public schools in the Treasure Valley saw enrollment grow by nearly 12,000 students, or 2%, between 2010-2015. Charter schools in the region grew by over 11% during the same period while public school enrollment in the U.S. grew by less than one-half of one percent (see **Figure 5** below).

Figure 5. Percent Change in Enrollment in Treasure Valley and U.S.



Source: ISDE and National Center for Education Statistics

New School Construction

Public school districts in the Treasure Valley where enrollment increases have been largest struggle to provide sufficient school capacity to meet demands. School construction is dependent on the successful passage of local capital bond measures. The upfront costs and long-lived nature of these investments in new buildings makes developing and garnering support for these capital plans a challenge for districts. Conventional wisdom about scale economies of school construction[3] often result in fairly large increments of new construction[4]; elementary schools sized for 500 or more students and middle and high schools that accommodate between 1000 to 2000 students. And at some point growth in enrollments necessitates these new investments.

The West Ada School District plans to open a new elementary school and a new middle school in 2017. Hillsdale Elementary will open near the corner of West Amity and South Eagle roads and accommodate 650 students. Victory Middle School will open near the corner of West Overland and South Stoddard roads with a capacity of 1,000. And Meridian High School is undergoing a remodel that will be complete before the 2017-18 school year,

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[3] Vincent, Jeffrey M. and Deborah Mckoy. 2008. "The Complex and Multi-Faceted Nature of School Construction Costs: Factors Affecting California." AIA Community Council. Accessed May 10, 2016. http://citiesandschools.berkeley.edu/reports/K-12_CA_Construction_Report.pdf

[4] Humann, Cheryl, Robert Palaich, Mark Fermanich, and Shawn Stelow Griffin. 2015. "Final School Size Study Report: Impact of Smaller Schools." APA Consulting. Accessed May 10, 2016. http://marylandpublicschools.org/adequacystudy/docs/SchoolSizeReport071615.pdf

increasing capacity by 200 students. The Vallivue School District is completing construction on Ridgevue High School (capacity 1,800) near the corner of Madison and Linden roads in Nampa, and has broken ground on Elementary School #7; which will have a capacity of 800 students. Boise School District has no current construction plans but under its 2006 bond measure constructed East, South and West junior high schools; Grace Jordan, Whitney and Morley Nelson elementary schools; and Frank Church High School. The Nampa School District is planning to open an innovative high school choice for the 2017-18 school year, having just received a major grant to fund the school's first two years of operation.

A Changing School-Age Population

Public school enrollment has mirrored the region's growth in school-age populations. Since 2000 the region has seen a net increase in school-age population (years 5 – 17) of over 34,000. And that growth is expected to continue. Between 2014 and 2019 there will be an additional 41,000 people in the region and 15,000 households. And there will be an additional 6,100 households with children. Population projection estimates provided by Nielson anticipate a net increase in the school-age population of nearly 3,500 by 2019. The inflow and outflow of households and the aging of population cohorts will also bring changes in the demographic composition of the school-age population within the region. The Treasure Valley school-age population will altogether become less white and more Hispanic. This is the continuation of trends evident since 2000.

Table 2. Treasure Valley School-Age Population 2000-2014 and 2019 Projections

School Age Population	2000	2010	2014	Proj. 2019
White	76,533	98,520	100,056	100,100
Non-White	8,044	13,304	15,024	17,200
Two or More Races	3,168	5,874	6,827	8,000
All Races	**87,745**	**117,698**	**121,907**	**125,300**
Hispanic/Latino (all races)	10,369	21,020	23,552	26,700

Source: U.S. Census, Nielson and ECONorthwest

The strong regional economy will create more prosperity and attract new households, but it will also result in additional households with modest means living in the region. In 2019 it is projected that there will be a net increase of 9,000 households in the region earning less than $50,000 a year; half of those earning less than $25,000. The growth in student-age population and its increased racial and economic diversity will present an evolving set of demands on local school services. In such a dynamic setting there will be significant benefits from the development and deployment of new school services. New, high quality schools have an important role to play in educating this growing population by offering students a diverse range of educational opportunities.

School Performance

In addition to growth in student populations and enrollments, new high-quality school choices are needed in the Treasure Valley to better serve students currently enrolled in schools struggling to advance student performance. In this study school performance is measured by examining the share of students that meet proficiency standards on the statewide math assessments. Math assessments were selected as a bellwether measure of student achievement. Actual shares of students meeting proficiency for each school are compared with expected student proficiency given the performance of other similar schools statewide. The expected performance of schools is predicted by a model described in the Appendix to this report. Schools are considered to be

underperforming when the actual shares of student meeting proficiency are significantly lower than is the case for similar schools statewide. This definition of underperformance is admittedly narrow and is not observed over multiple years. As a result, the measures should be understood for what they are – not an assessment of individual school quality but rather a general indicator of where there are students who might benefit from a broader array of school choices.

School-level models were estimated based on data from 2013 statewide assessments (ISAT) and from 2015 assessments. Between 2013 and 2015 Idaho adopted a new assessments based on the Smarter Balanced Assessment Consortium and designed to support Common Core curriculum. This transition in assessment platforms means that analysis of 2013 and 2015 school performance, based on these testing data, are independent and are not comparable. We have included both 2013 and 2015 results independently in our final index.

In the Treasure Valley there were more than 18,000 students enrolled in significantly underperforming schools (in the bottom 20% of performance on the math assessment as compared with similar schools across the state) in 2013. There were just fewer than 10,000 students in significantly underperforming schools (by this measure) in 2015 (see **Table 3**). Between 2013 and 2015, again noting the change in tests, the total share of students in the Treasure Valley meeting standards in math declined from 77 percent to 38 percent. However, the share of Treasure Valley students enrolled in schools that significantly underperformed when compared with similar schools statewide declined.

Table 3. Students Enrolled in Schools Grouped by Performance Quintile for Math Assessments

	2013		2015	
Performance Quintile	Enrollment	Share	Enrollment	Share
Lowest Quintile	18,752	18%	9,960	9%
Second Quintile	26,770	25%	19,985	19%
Third Quintile	23,433	22%	24,042	22%
Fourth Quintile	22,812	21%	27,087	25%
Highest Quintile	15,378	14%	26,071	24%

Source: ECONorthwest, data from ISDE

The Need For New School Services

In summary we find that the Treasure Valley has a strengthening economy, with a growing population. This population is notably younger than is typical for many U.S. metro areas. School enrollments, like school-age populations, have increased in recent years and will continue to do so. Many school districts in the area are challenged to provide increased school capacity and expanded programs. And some schools struggle with getting kids to meet state standards. All these factors point to the importance of actively pursuing the development of new choice school options for the residents of the Treasure Valley. One very important question, however, is where should these school options locate in order to best serve the expanding needs of Treasure Valley kids over the next 5-10 years?

3. A School Opportunity Index

By virtue of economic growth, a young population, and inconsistent performance across existing schools – new school choices will be an important part of meeting the Treasure Valley's needs over the next decade. It is the premise of this report that schools of choice should strategically locate within the region in order to best meet emerging needs. There are a large number of potential factors that contribute to the where new option schools might locate, but primary factors can be categorized as follows:

- The location of target populations of interest (e.g. populations of non-white, Hispanic and persons living in poverty)
- The location and expected growth in the school-age populations
- The location of students currently enrolled in underperforming schools

New school services are needed most where existing target populations (minority and low income students) are concentrated, where the expectations of school-age population growth is greatest, and where existing student needs are not adequately met by current programs. These are the factors selected in order to identify potential priority locations for investments in new school services and programs. These factors are clearly not the only ones that could be used for this purpose. Instead these represent a reasonable approach to developing a high-level understanding of new school opportunities in the Treasure Valley. The results of this effort should be used in combination with other local knowledge about school program siting opportunities and needs.

Each of the factors is described in greater detail in **Section 4** of this report. For purposes of identifying new school opportunities the factors are best considered in combination. And meaningfully combining many measures together is always a difficult proposition.

Bringing together many factors to highlight new opportunities for school placement is a challenging exercise. First, each factor must be measured in some common unit (in this case each factor was rendered into a common spatial unit). Creating a common spatial unit of analysis can involve the translation of values from one spatial unit to another. This introduces some degree of measurement error. Second, the variability of observed values for each factor must be normalized. And finally, the importance of factors, measuring very different phenomena must be determined. Once all these steps are performed factors can be combined into an index.

This study has developed a School Opportunity Index from the various factors described in more detail later in this report. Each of the three factor categories is given equal weight in the final index. Factor weight are best provided by the parties involved directly in a decision process. This report employs equal weights as a starting point, but this assumption could be modified if one factor is considered more important than others. Measures for each factor are normalized[5] before they are combined into the School Opportunity Index. At the end of the process each 1-mile grid of the Treasure Valley is assigned an index value. Most grids cells have an index value of less than one, and grid cells with an index above one are considered to be meaningful candidates for new school services.

Such an index is a shortcut for understanding the relative opportunities for new school services across the urban geography. As a shortcut, it is an efficient means of conveying information, but at the expense of some fidelity of meaning that is contained in the individual factors that lie beneath the index. Indices should be used appropriately, as a means of narrowing in on some dimension of a problem or phenomenon. In this case the School Opportunity Index gives some insights into generally where new school services might best be located. But final decisions about the siting of those services need to dive deeper into the local environment to better understand opportunities and constraints.

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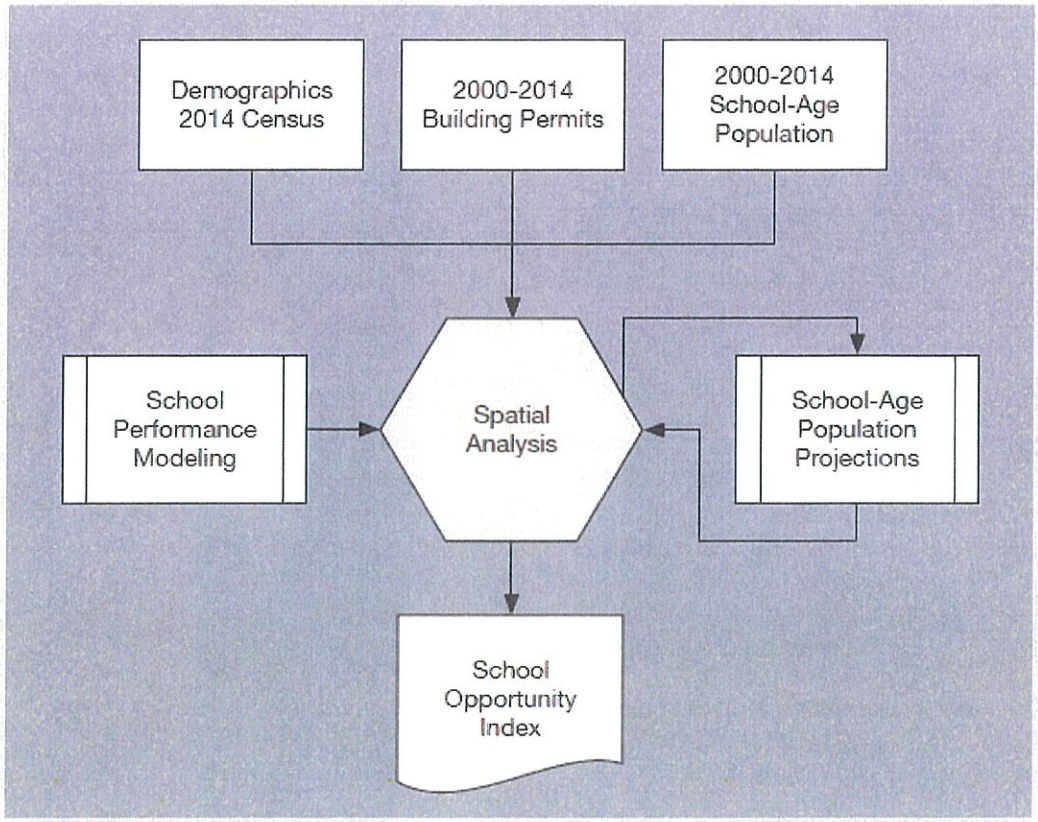
[5] As a result of a normalization process it is the highest 10 percent of each factor in the index that contributes meaningfully to the index value.

Figure 6. Development of School Opportunity Index



4. Factors Contributing to the Need for New School Services

Public schools must meet a diversity of student needs while maintaining an appropriate degree of standardization across the services they provide. The need to standardize arises both from principle and necessity. Public services should be fairly administered, and within available budgets. These challenges often limit the ability of traditional public school providers to innovate and specialize in the delivery of education services. Yet innovation is needed. Charter schools, and other public schools of choice, strive to meet the needs of students that might not otherwise be met by other available public school options. Private school programs also serve an important role in addressing the diversity of student needs. Many of these schools are driven by mission to serve students with unique requirements or disadvantaged backgrounds. In total, the education sector has an obligation to provide broad access to high quality educational services and strive to improve educational outcomes for all students.

It is the premise of this report that schools of choice should strategically locate within the region in order to best meet emerging needs. There are a large number of potential factors that contribute to the need for choice schools. What follows is a closer examination of some of the most important factors (grouped into three overarching categories) that will help to define the market for new school services.

- The location of target populations of interest (e.g. populations of non-white, Hispanic and persons living in poverty)
- The location and expected growth in the school-age populations
- The location of students currently enrolled in underperforming schools

Factor 1: Location of Target Populations of Interest

The locations of target populations within the greater Boise region can be understood through an examination of data from the American Community Survey (ACS) collected by the Census Bureau. The ACS is an ongoing survey providing information about the nation and its population on an annual basis. The most current information about local population demographics is associated with the 5-year estimates covering 2010-2014. Census block group estimates of population demographics have been superimposed onto a hexagonal grid of the region where each grid cell represents one square mile.

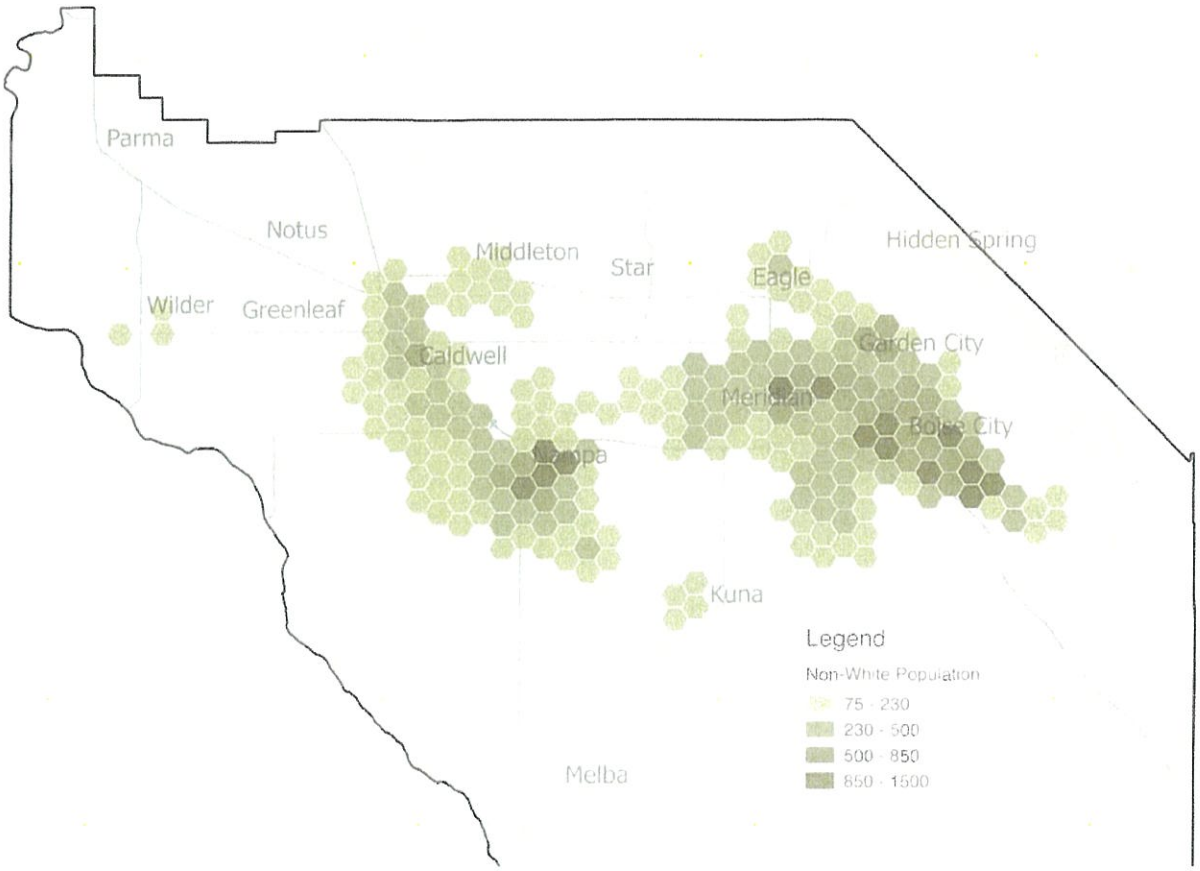
Non-White Population

The current non-white population in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa and Caldwell. The population (see **Figure 7**) is located:

- In the Boise area bounded by I-184, I-84 and U.S. 20,
- West Boise south of U.S. 26,
- North of Garden City,
- In the neighborhoods to the east of Broadway Avenue,
- East Meridian,
- In central Nampa, and
- Along the I-84 corridor through Caldwell.

The location of the school-age non-white population largely mirrors that of the total non-white population.

Figure 7. Non-White Population 2014 (5-year Estimate)



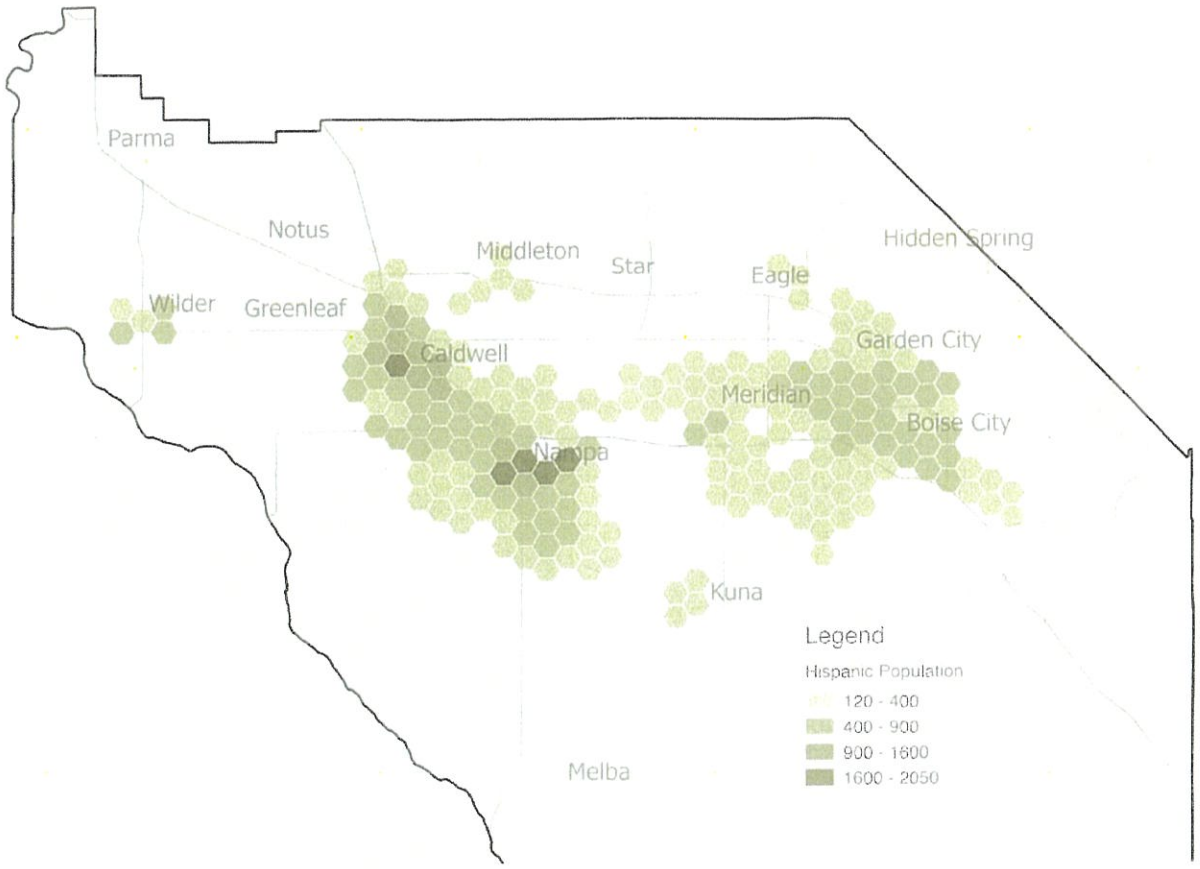
Source: American Community Survey

Hispanic Population

The current Hispanic population (see **Figure 8**) in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa, Caldwell and Kuna – with the highest concentrations in Nampa and Caldwell. There are also population concentrations located:

- In the Boise area bounded by I-184, U.S. 26, and U.S. 20,
- North of downtown Boise,
- In Meridian near the intersection of I-84 and S. Meridian Rd.,
- South of Nampa, and
- South of Caldwell.

Figure 8. Hispanic Population 2014 (5-year Estimate)



Source: American Community Survey

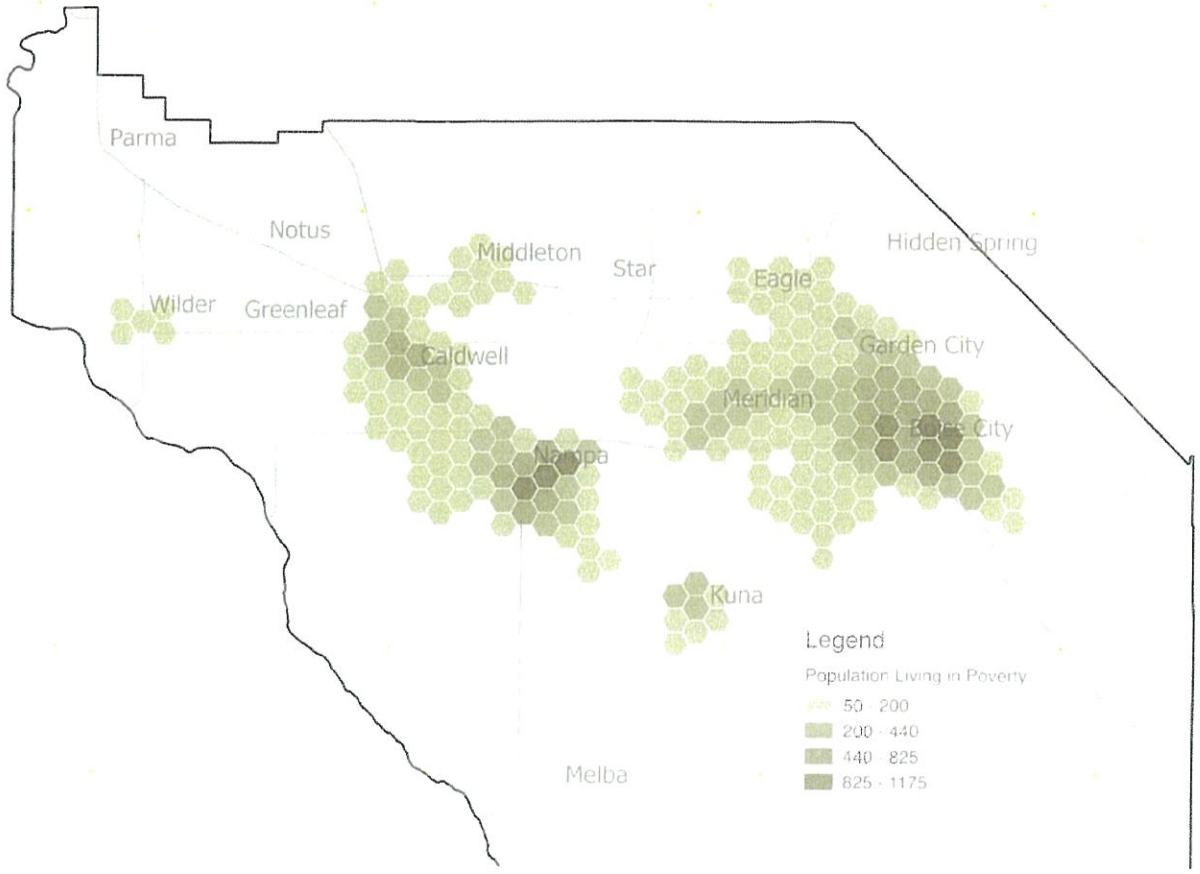
Persons Living in Poverty

The current population of persons living in poverty in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa, Caldwell and Kuna (see **Figure 9**). The highest population concentrations are located:

- In the Boise area bounded by I-184, I-84 and U.S. 20,
- In Boise to the north of I-184,
- In the neighborhoods to the east of U.S. 20,
- East Meridian and just north of I-84,
- In central Nampa and Caldwell, and
- In central Kuna.

The location of the school-age low-income population largely mirrors that of the total population of persons living in poverty.

Figure 9. Persons Living in Poverty 2014 (5-year Estimate)



Source: American Community Survey

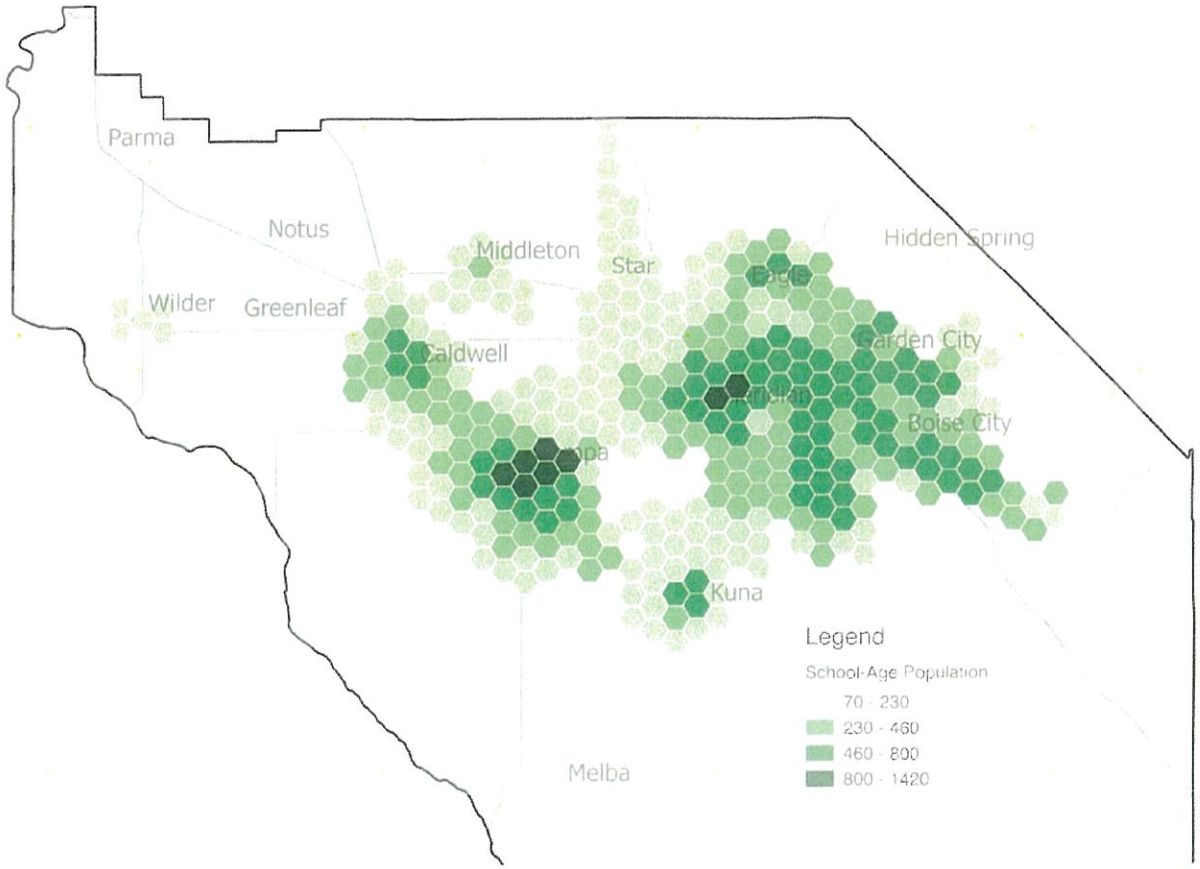
Factor 2: School-Age Population Location and Growth

A key determinant of new school opportunities is the current location of school-age populations (ages 5-17) and expectations about the amount and location of growth in the school-age population.

Current School-Age Populations

The location of the current school-age population largely reflects the total population. But there are some notable differences. The total population is heavily concentrated in the Boise vicinity. The school-age population (shown in **Figure 10**) is relatively more concentrated in Meridian, Nampa, Caldwell, Kuna, Middleton and Eagle than is true for the total population as a whole.

Figure 10. School-Age Population in 2014 (5-year Estimate)

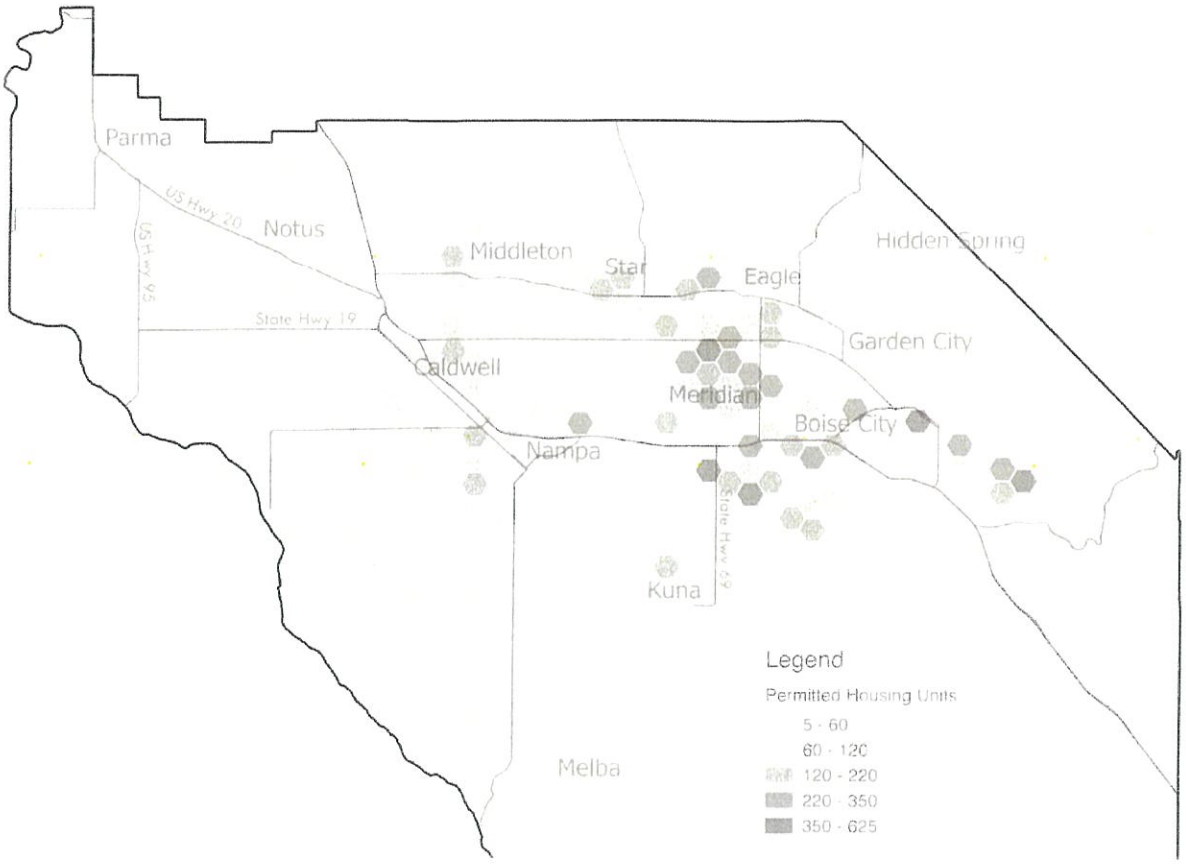


Source: American Community Survey

Housing Development

In order to gain insights into the amount and location of the growth in school-age population it is helpful to examine activity in the land development markets. The permitting of housing units is, by definition, a precursor of new housing growth. Permitted housing units are employed by COMPASS in the development of their population forecasts, and the COMPASS forecasts inform the projections of school-age population developed for this study. This is described in more detail in the **Appendix** to this report. As a result, the location and number of permitted housing units is included as a factor in the school opportunity index. Permitted units between 2010-2014 are displayed in the **Figure 11** below at a 1-mile grid cell spatial resolution.

Figure 11. Housing Units Permitted Between 2010 - 2014



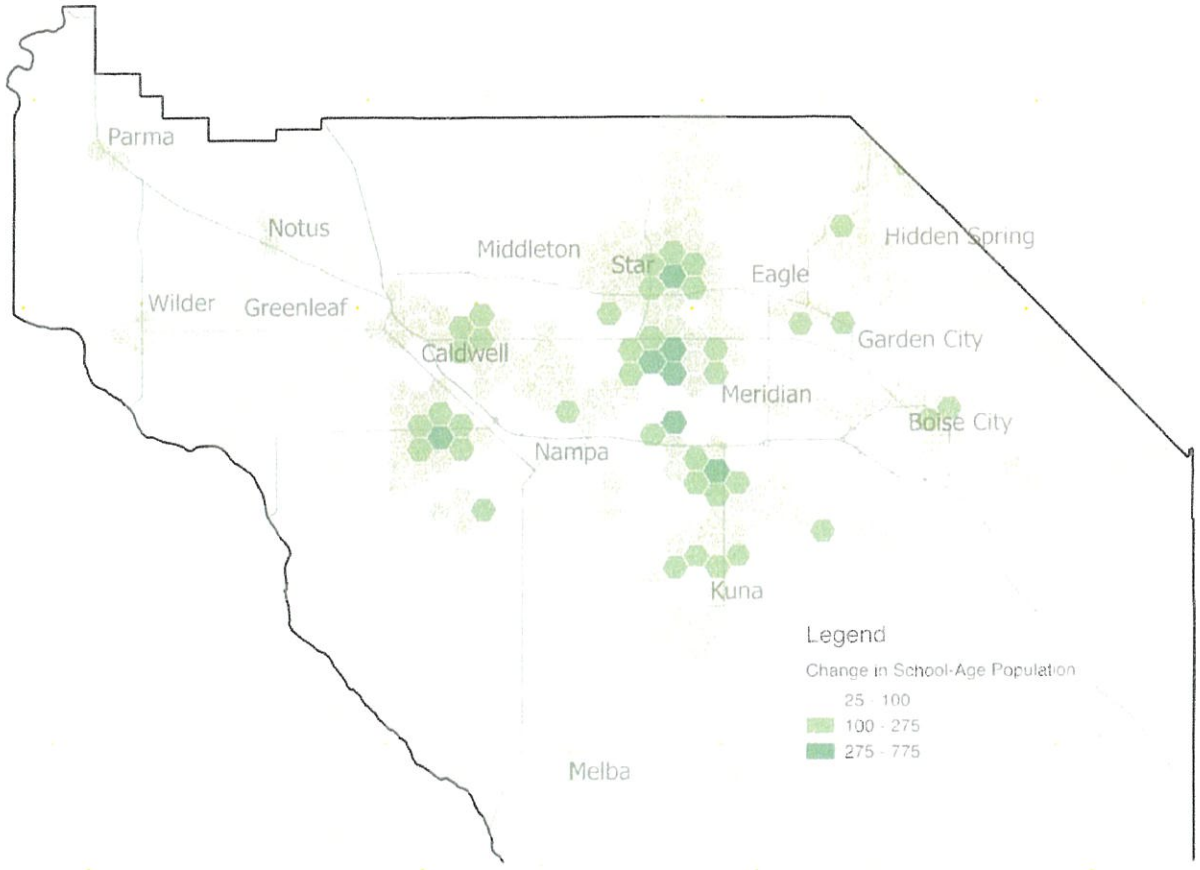
Source: COMPASS, Jurisdictions

School-Age Population Projections

Expectations about the magnitude and location of growth in school-age population are of significant importance to the siting of new school services. This study has developed school-age (5-17) population projections for 2020 and 2025 at a 1-mile grid cell geography. The projections of school-age population are based on a model estimated from block-group data from the U.S. Census and American Community Survey. The methods are described in detail in an Appendix to this report. This very simple model performs well and allows for the development of small geography school-age population projections where future population growth is supplied by the COMPASS population forecasts.

Figure 12 below is a map depicting the projected net change in school-age population between 2014-2025. Areas of expected growth include parts of Boise, north of Garden City, areas west of Meridian (both north and south of I-84), north of Meridian in Star, north of Nampa, in the vicinity of Caldwell and areas surrounding Kuna.

Figure 12. Projected Growth in School-Age Population 2014 - 2025

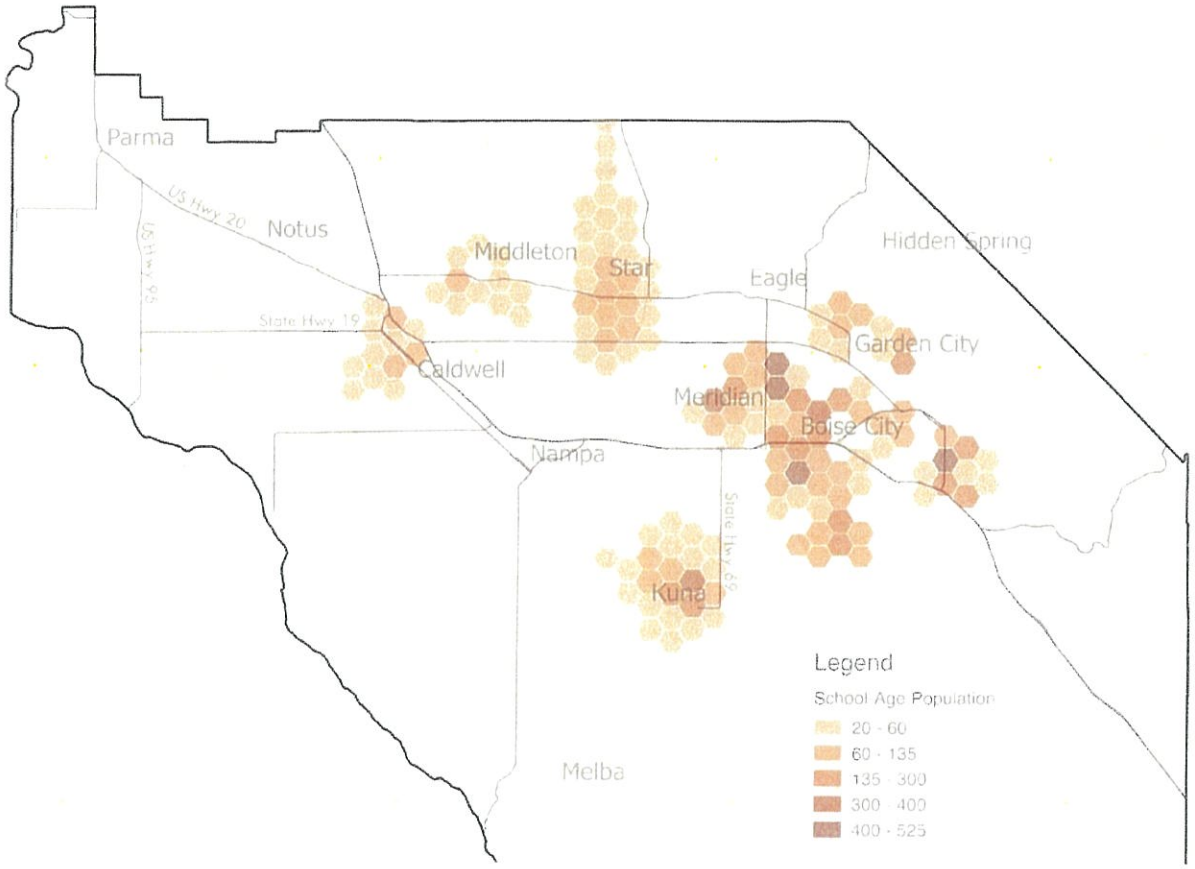


Source: ECONorthwest, Data from Census, ACS and COMPASS

Factor 3: Location of Students in Underperforming Schools

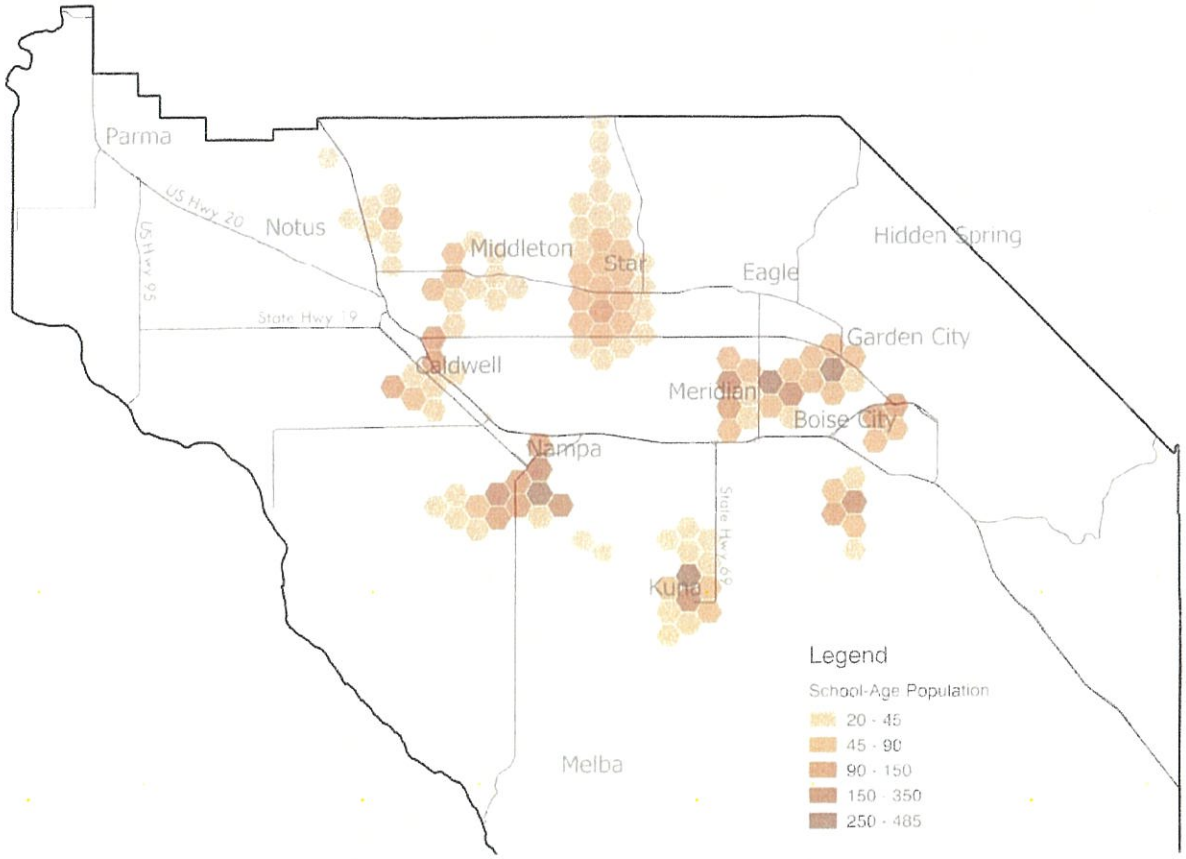
The third factor utilized in the identification of new school opportunities is a measure of the school-age population living proximate to schools that have underperformed as a share of students proficient on the math assessment relative to similar schools statewide (see **Figure 13** for 2013 assessment results and **Figure 14** for 2015 results). A model of school performance was estimated (details are contained in an **Appendix** to this report), where the share of students meeting or exceeding state standards in math assessments is the outcome of interest. The actual performance of schools, as compared with their expected performance, is the determinant of whether a school is underperforming, meeting performance expectations of exceeding expectations. Students enrolled in schools performing in the lowest 20 percent by this measure were identified as being significantly underserved.

Figure 13. School-Age Populations Near Underperforming Schools in 2013 Math Assessments



Source: ECONorthwest, Data from ISDE

Figure 14. School-Age Populations Near Underperforming Schools in 2015 Math Assessments

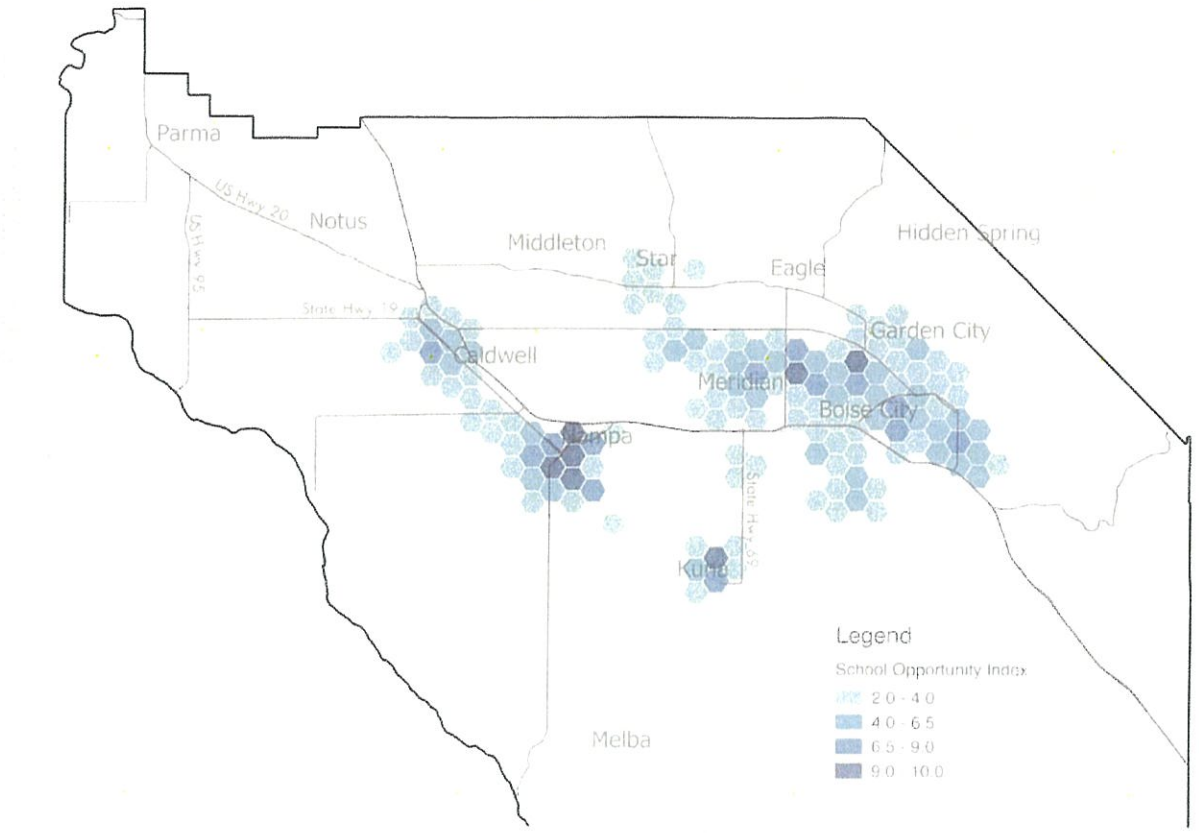


Source: ECONorthwest, Data from ISDE

5. A Summary of School Opportunity

The strongest opportunities for new school services in the Treasure Valley are located in an around the region's largest urban places of Boise, Meridian, Nampa, Caldwell and Kuna (see **Figure 15**). This is not an entirely surprising finding. School services should be directed towards the school-age population; which is located in major population centers. But underneath this high-level conclusion are more nuanced observations. The Nampa area in particular seems to be a strong candidate for new school services. A large area comprised of parts of west Boise and east Meridian also presents strong opportunities. Kuna and Caldwell also stand out given their relatively smaller concentration of population. Each of these urban places is examined more closely in what follows with some observations about the index value's contributing factors.

Figure 15. School Opportunity Index



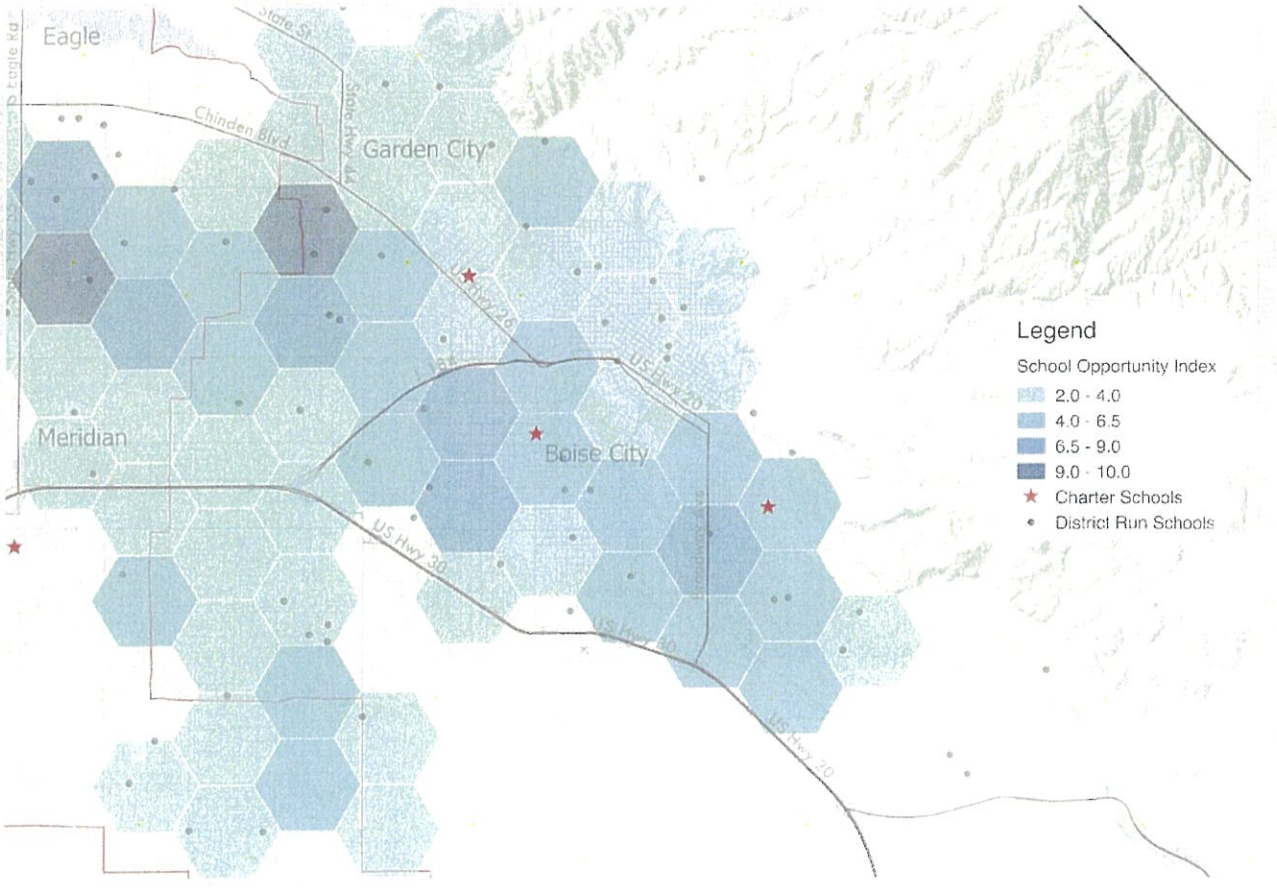
Source: ECONorthwest

Boise

The strongest opportunities for new school services in the Boise vicinity are south and west of downtown. These opportunities (see **Figure 16**) are associated with the following:

- Concentrations of existing school-age population throughout the Boise area and especially west of downtown between U.S. 26 and I-84.
- Expected growth in school-age population in the vicinity of downtown and along the I-84 corridor.
- A large number of permitted housing units southeast of downtown between U.S. 20 and the Boise River.
- Concentrations of people living in poverty in the area bounded by I-184, I-84 and U.S. 20.
- Concentrations of Non-White populations fairly concentrated throughout the Boise vicinity.
- Concentrations of Hispanic populations between Eagle Rd. and Broadway Ave., and U.S. 26 and I-84.
- Students enrolled in underperforming schools in west Boise in 2013 and to a lesser degree in 2015.

Figure 16. School Opportunity Index: Boise



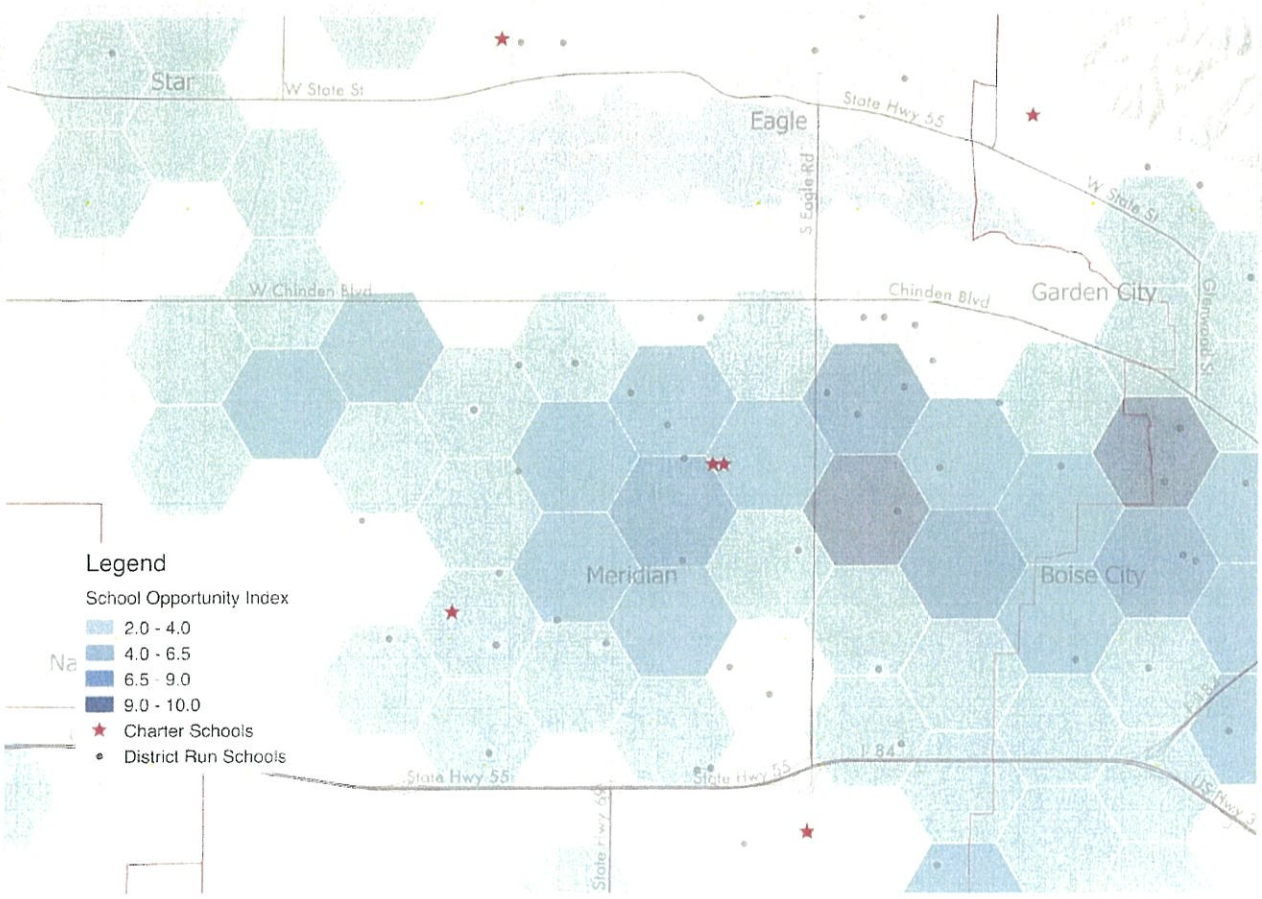
Source: ECONorthwest

Meridian

The strongest opportunities for new school services in the Meridian area are along the U.S. 26 corridor, to the east towards Boise, and south of I-84. These opportunities (see **Figure 17**) are associated with the following:

- Concentrations of existing school-age population within central Meridian, to the east towards Boise and the neighborhoods just to the south of Meridian and Boise.
- Expected growth in school-age population in west Meridian, north of Meridian near Eagle and Star, south of I-84 and along S. Meridian Rd.
- A large number of permitted housing units north and south of central Meridian and along the Eagle Rd.
- Concentrations of people living in poverty in central Meridian.
- Concentrations of Non-White populations within Meridian proper.
- Concentrations of Hispanic populations in south Meridian along the I-84 corridor, along S. Meridian Rd. and in the vicinity of Ten Mile Creek.
- Students enrolled in underperforming schools in east Meridian and areas south of Meridian and Boise in 2013, and to a lesser degree in 2015.

Figure 17. School Opportunity Index: Meridian



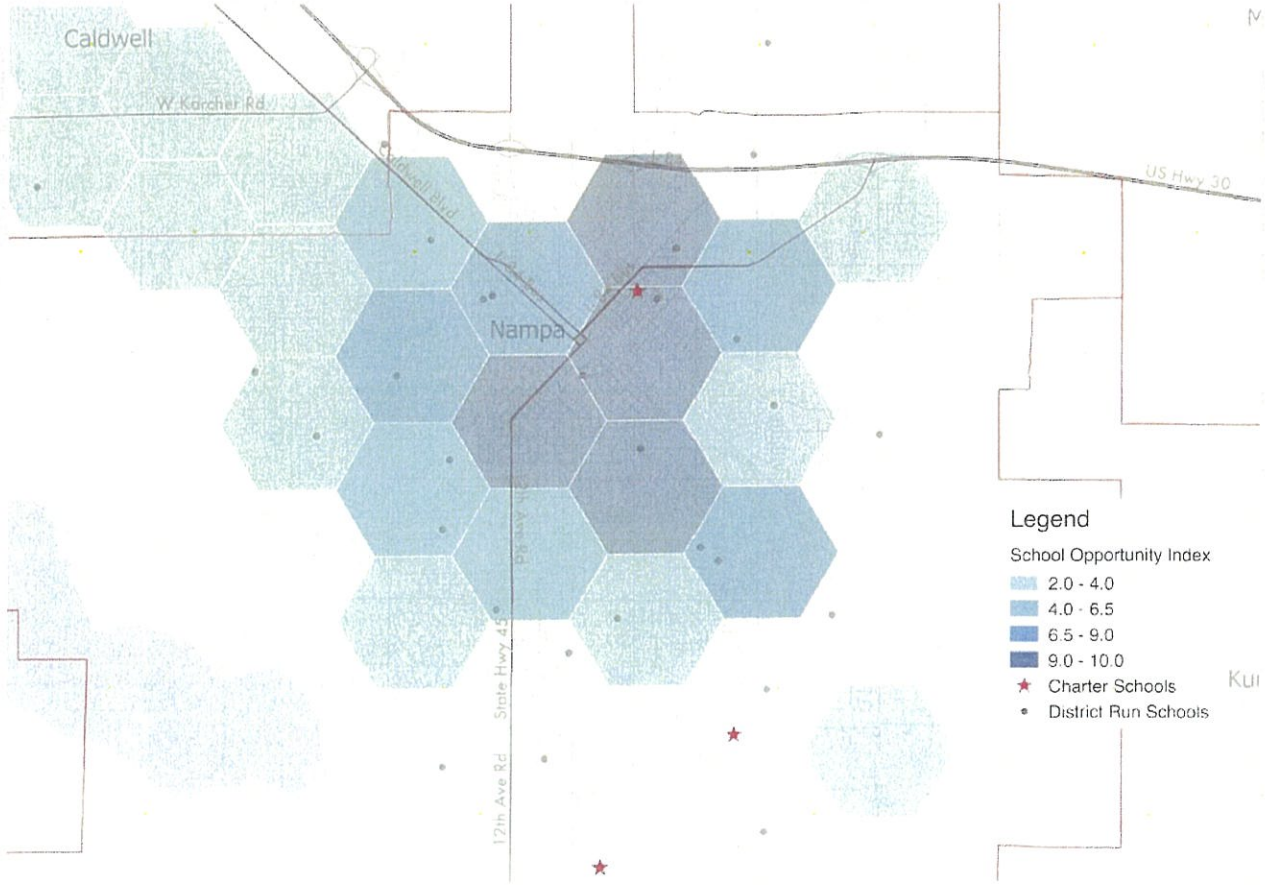
Source: ECONorthwest

Nampa

The strongest opportunities for new school services in the Nampa vicinity are within central Nampa and along the I-84 corridor towards Caldwell. These opportunities (see **Figure 18**) are associated with the following:

- Concentrations of existing school-age population in the vicinity of central Nampa and stretching north towards Caldwell and south towards Kuna.
- Expected growth in school-age population between Nampa and Caldwell south of I-84.
- A large number of permitted housing units along the northern, western and southern peripheries of central Nampa.
- Concentrations of people living in poverty in the center of Nampa, along the I-84 corridor and extending south along 12th Ave. S.
- Concentrations of Non-White populations along the I-84 corridor.
- Concentrations of Hispanic populations in central Nampa along Caldwell-Nampa Blvd. and 11th Ave. N.
- Students enrolled in underperforming schools in the Nampa area in 2015.

Figure 18. School Opportunity Index: Nampa



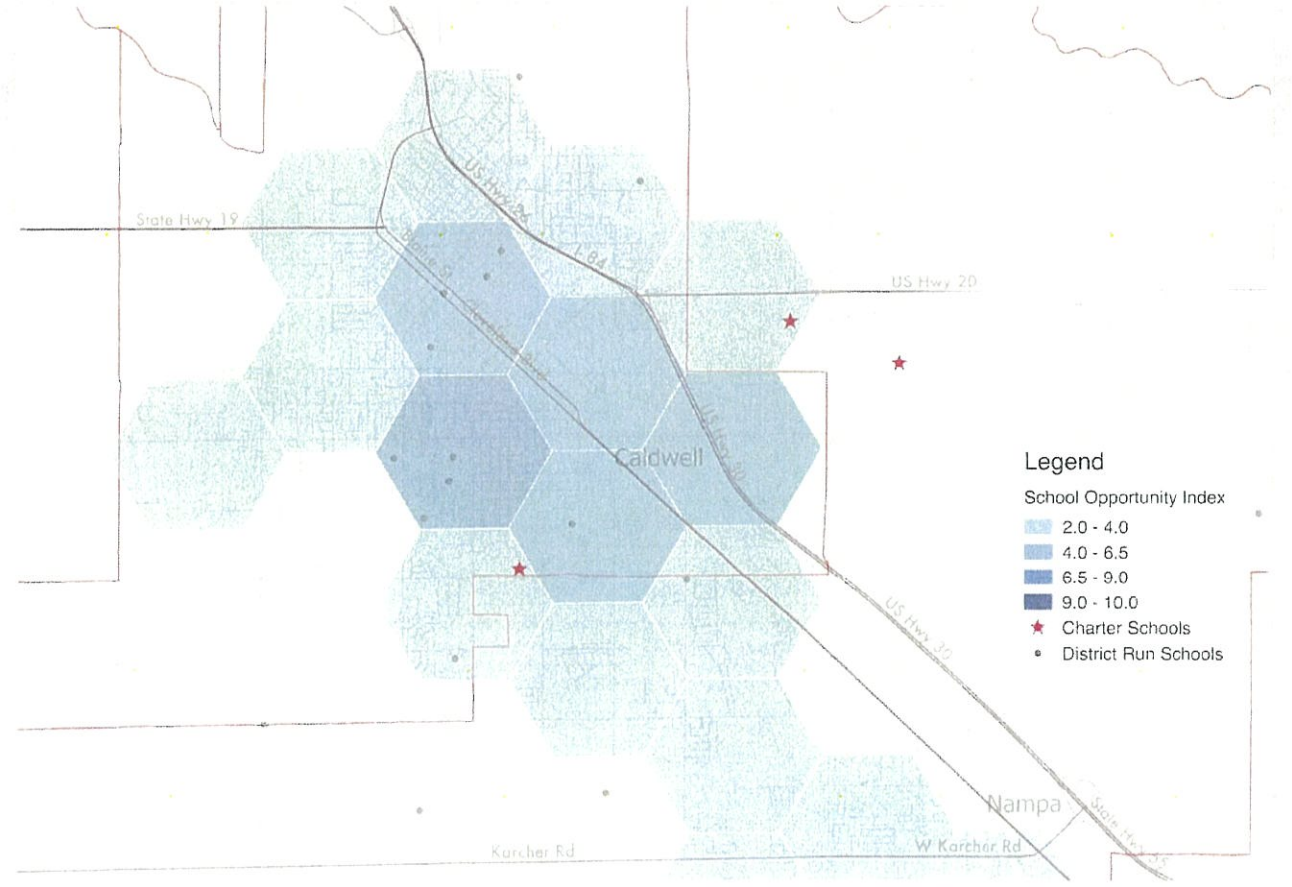
Source: ECONorthwest

Caldwell

The strongest opportunities for new school services in the Caldwell vicinity are in central Caldwell and along the I-84 corridor towards Nampa. These opportunities (see **Figure 19**) are associated with the following:

- Concentrations of existing school-age population in the vicinity of central Caldwell and stretching south towards Nampa.
- Expected growth in school-age population between Nampa and Caldwell southwest of I-84, and east of Caldwell towards Middleton.
- A concentration of permitted housing units to the south and east of central Caldwell.
- Concentrations of people living in poverty in central Caldwell and along the I-84 corridor.
- Concentrations of Non-White populations along the I-84 corridor.
- Concentrations of Hispanic populations in central Caldwell and along Cleveland Blvd.
- Students enrolled in underperforming schools in the Caldwell area in 2013 and in both Caldwell and to the north in Middleton in 2015.

Figure 19. School Opportunity Index: Caldwell



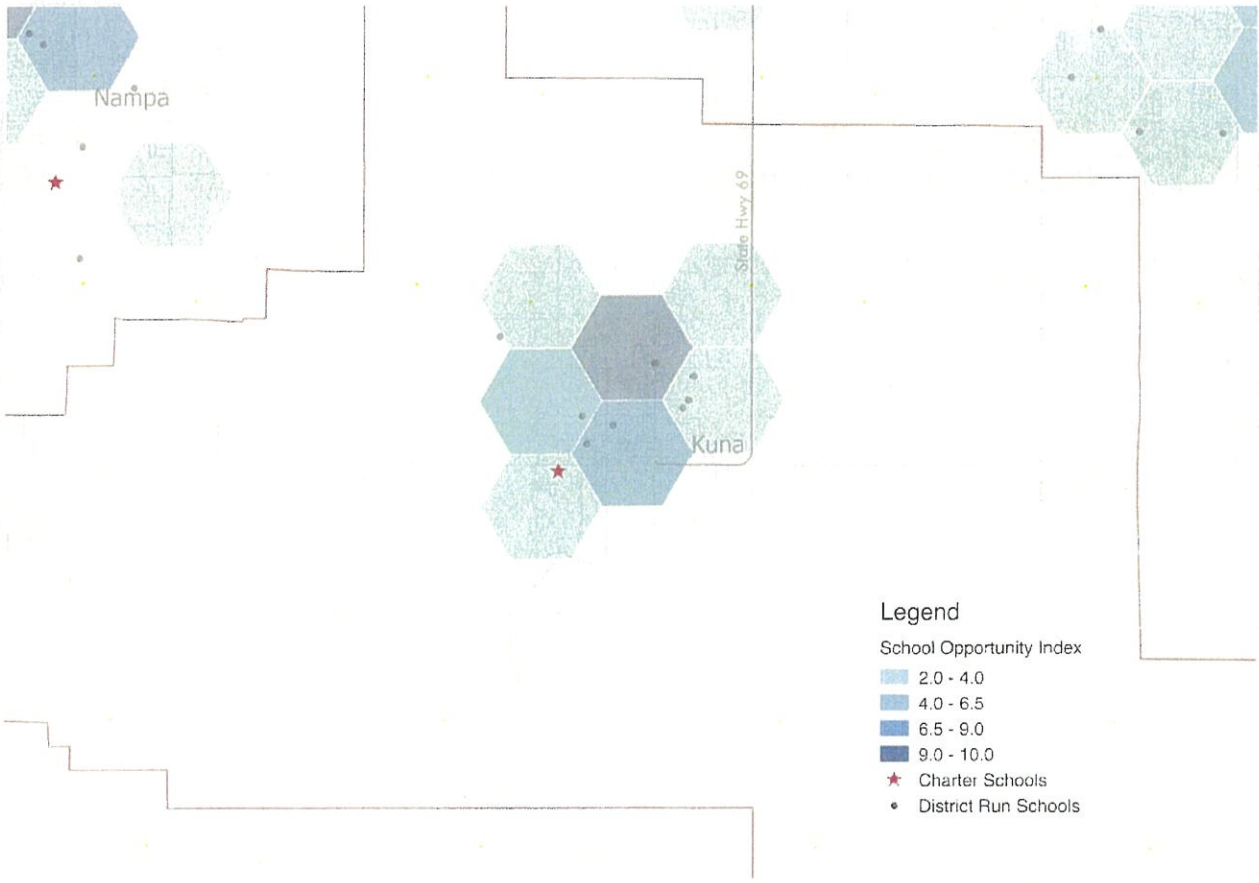
Source: ECONorthwest

Kuna

The strongest opportunities for new school services in the Kuna vicinity are within central Kuna and north along S. Meridian Rd. These opportunities (see **Figure 20**) are associated with the following:

- Concentrations of existing school-age population in central Kuna and along S. Meridian Rd. towards the neighborhoods south of Meridian and Boise.
- Expected growth in school-age population primarily north of Kuna and along S. Meridian Rd.
- A concentration of permitted housing units to the north of central Kuna.
- Concentrations of people living in poverty in central Kuna.
- Concentrations of Non-White populations in central Kuna.
- Concentrations of Hispanic populations in central Kuna.
- Students enrolled in underperforming schools in Kuna in both 2013 and 2015.

Figure 20. School Opportunity Index: Kuna



Source: ECONorthwest

6. Conclusion

This report examined a number of factors important to the question of where new school opportunities exist within the Treasure Valley. These factors included measures relating to 1) the current location of populations that are the target of new choice school options, 2) the locations of expected growth in school-age populations, and 3) the location of school-age populations that are currently underserved by existing school programs. Any one of these factors, on their own, could be a justification for the siting of new school programs. This report made progress toward the development of a combined measure of the relative importance of school siting locations, or a School Opportunity Index.

By this measure the most promising locations for the siting of new school services are throughout much of the city of Boise; in the city of Meridian between I-84 and U.S. 26, south along SR 69 and north to Star; and within the cities of Nampa, Caldwell and Kuna. Unsurprisingly, new school opportunities are greatest in existing population centers, and also reflect expectations for where growth in school-age population will be greatest over the next few years.

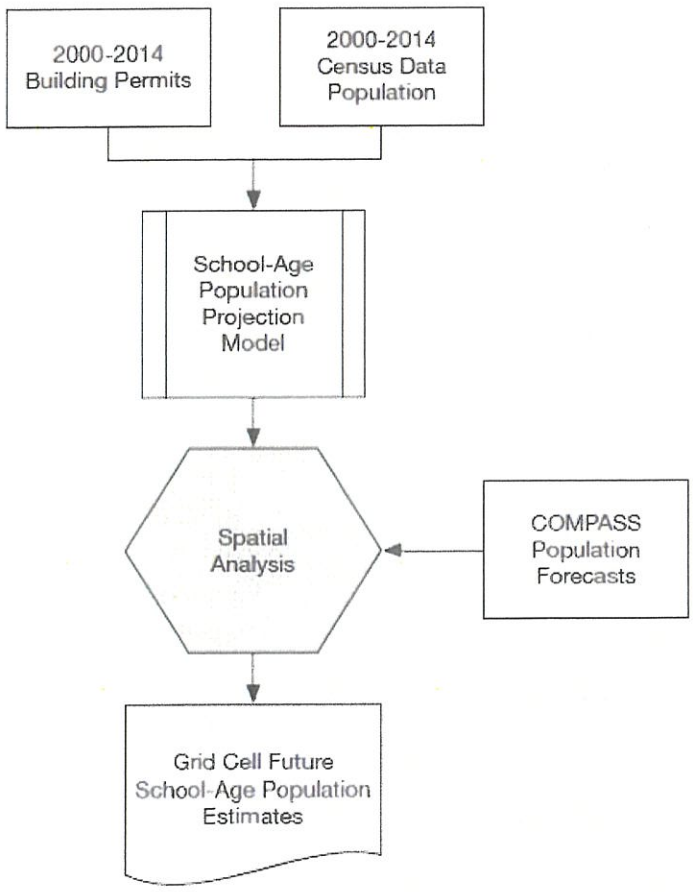
The School Opportunity Index is not a substitute for a deeper understanding of local market conditions. It should be used only as a guide within a more detailed examination of local factors and student needs in support of decisions about where to locate new school programs. This report does highlight the need for new school options in the Treasure Valley. The school-age population in the Valley is expected to grow by around 3,400 by 2020 and an additional 5,000 by 2025. And the number of existing students served by school programs that are underperforming relative to their peer schools across the state number in the thousands. An increasingly diverse population of students will lead to the need for a diverse set of programs to meet those needs. This report provides a starting point for the consideration of where new school programs might be located in the Treasure Valley.

APPENDIX: Modeling Methods

School-Age Population Projection Methods

This study has developed Treasure Valley projections of school-age population at a 1-mile grid cell geography. A previous project, *Shifting Sands: Idaho's Changing Student Demographics and What it Means for Education*, made use of census tract level population projections made available by the Nielson Company. The Nielson projection methods start with estimates of "base counts," such as total population, household population, group quarters population, households, family households, and housing units. Characteristics related to these base counts are then estimated. Population characteristics include age, sex, race, and Hispanic ethnicity; households are estimated by age of householder and income; family households are estimated by income; and owner-occupied housing units are estimated by value. The Nielson cohort survival method is executed first at county level, then for tracts, and finally block groups, with each set of estimates controlled to the results at the next higher geographic level.

Figure 21. School-Age Population Projection Model



These projections had two important limitations with respect to what was useful to this study of school opportunities. First, population projections for 2019 represent only a very small time increment. Second, census tract geography is too large to allow for the development of insights relevant to the school service siting problem. The methods employed in this study differ considerably. A simple block-group model of school-age population was estimated from U.S. Census and ACS data.

The model predicts school-age population in the current time period as a function of the school-age population and the under-5 population in the previous time period, as well as the change in total population and permitted housing units between the previous and current time periods. A second model predicts the under-5 population in the current time period as a function of the under-5 population in the previous period, total population in the previous period and the change in total population between the previous and current time periods. Both models fit the data well. The school-age model has an r-squared of .98, explaining 98 percent of the variability in current year school-age population across the census block groups. The under-5 model has an r-squared of .96.

The use of these simple models in the production of school-age population projections involves a number of additional steps. Future estimates of total population at a small geography are supplied by population forecasts developed by the regional Metropolitan Planning Organization (COMPASS)[6]. These population forecasts include 5-year estimates of population at a Transportation Analysis Zone (TAZ) geography through 2040. These forecasts of total population are needed to estimate growth in school-age population. To operationalize the model in the population projection process all data elements are converted into the 1-mile grid cell geography. The results are grid cell level projections for under-5 population and school-age population for 2020. These results are then used to develop projections for 2025 as well. The process is displayed in **Figure 21**.

The number of permitted housing units (between the previous and current period) was included in our school-age population model, but was a weak predictor of school-age population given the inclusion of a measure of total population change. There is also no reasonable means of developing a future estimate of permitted units and so this variable is dropped when projecting future school-age population. The permit data collated by COMPASS from individual jurisdictions informs the COMPASS demographic forecasts, and in this manner influence the results.

The school-age population projection methods employed for this study have advantages and disadvantages. They are simple to implement and understand, and they perform well in terms of estimation from historical data. As aggregate models when used to project out future populations they are sensitive to small changes in the estimated parameters, or model error. The future estimates are also intimately linked to the total population forecast that "drive" the projections, in this case these are the COMPASS forecast products. The current methods allow for the representation of the projected population at a small geography (1-mile grid cell) and the total projected school-age population for the Treasure Valley compares reasonably with the projections produced by Nielson using their proprietary "top-down" approach.

Table 4. Historical and Projected School-Age Population

Source and Year	School-Age Pop
2000 Census	87,745
2010 Census	117,698
2014 ACS	121,907
2019 Nielson	**125,300**
2020 Current Method	**125,230**
2025 Current Method	130,520

Source: ECONorthwest, Nielson, U.S. Census

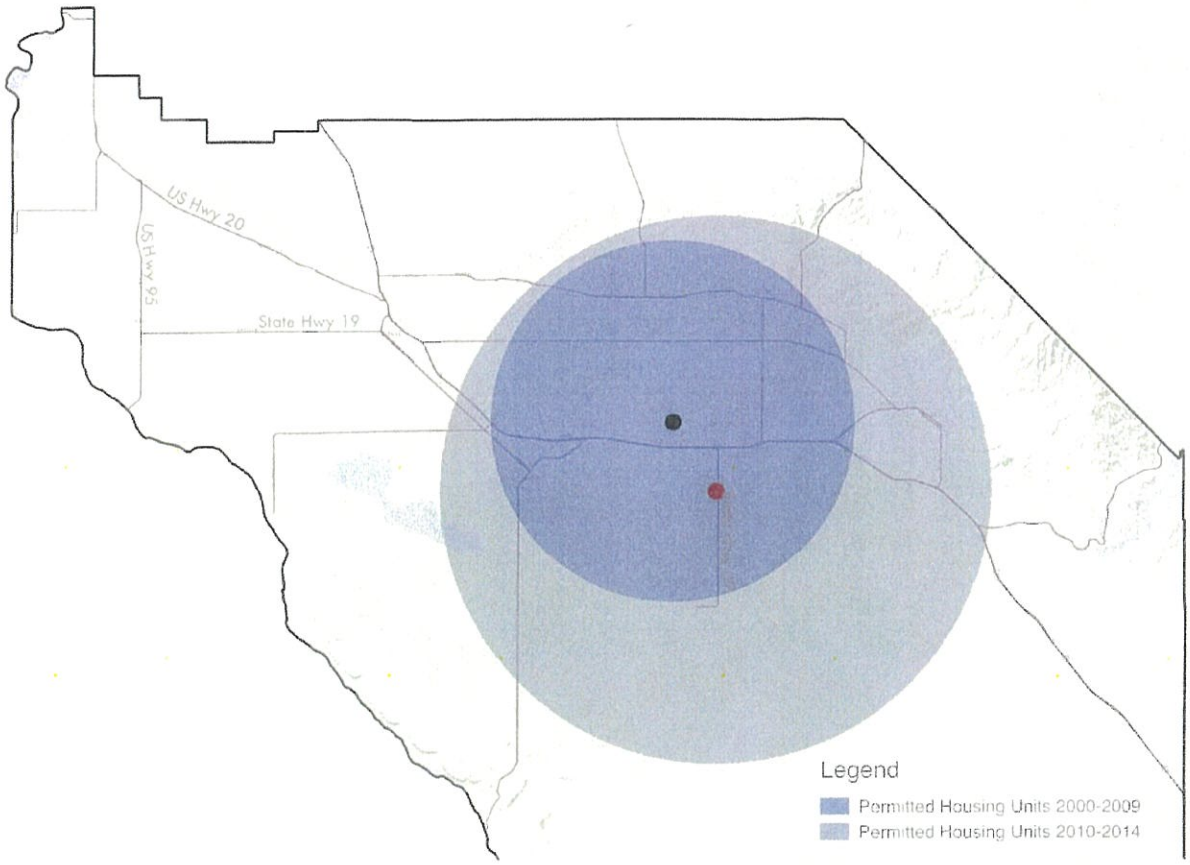
Building Permit Data

Within urban environments the construction of new housing units typically occurs at locations that are not necessarily where there are the densest concentrations of current residents. Land is often less expensive at the periphery of existing developments, especially in the case of land suitable to single-family detached housing. Multi-family housing units, on the other hand, will tend to concentrate in more densely populated areas (spreading land costs over multiple units) and along major transportation corridors. These trends are in part determined by land use policies but are also a function of the underlying economics of land markets. In trying to understand where new development may happen it is useful to look at data collected by permitting jurisdictions relating to permitting activities for residential units. COMPASS, the Metropolitan Planning Organization for the

[6] COMPASS. 2016. "Demographic Forecasts: Population, Housing, and Employment." Accessed May 10, 2016. http://www.compassidaho.org/prodserv/demo-forecasts.htm

Boise region, collects and assembles housing building permit data from individual jurisdictions. COMPASS uses this data in its own population forecasting process.

Figure 22. Mean Permitted Housing Unit-Weighted Distance to Center



Source: ECONorthwest, COMPASS and Jurisdications

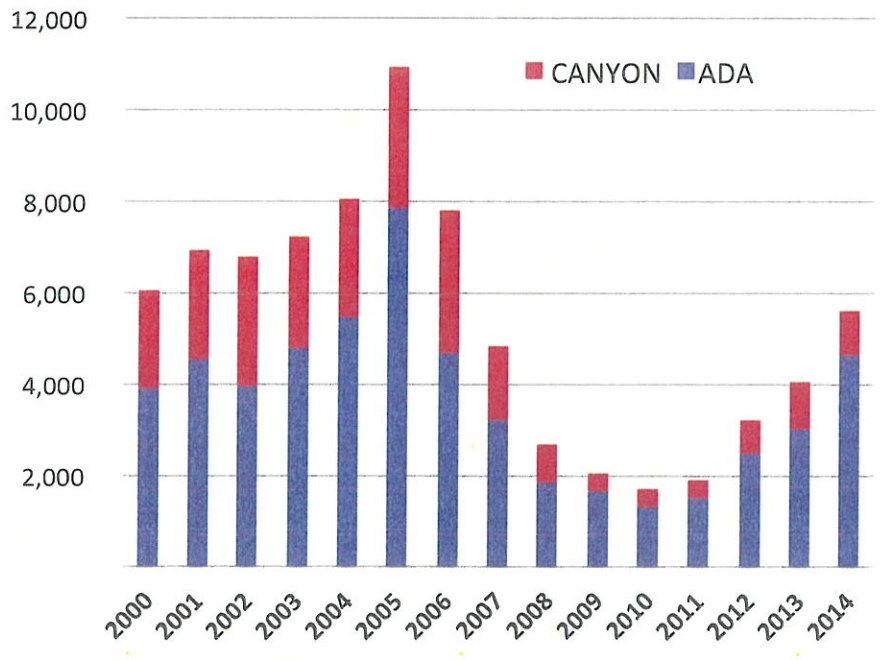
The issuance of a building permit does not necessarily lead the development of new housing units associated with that permit. The permit allows developers to proceed along the path of the development process, but that process may be abandoned for any number of reasons. For example, a simple model that predicts (at the 1 mile grid geography) the change in housing units (as measured through the U.S. Census and American Community Survey) as a function of the number of permitted housing units in previous years suggests that somewhere in the range of 70 percent of permitted units result in new housing units. This result held true in the period leading up to the 2010 census. Post 2010 the model is a weaker predictor and the pattern in less clear.

Examining permitted housing units pre- and post-2010 also shows some differences in the location of new permitted units. **Figure 22** depicts the housing unit-weighted mean (centered) locations and buffers depicting the housing unit-weighted mean distance from the center for units permitted pre-2010 and post-2010. Units permitted pre-2010 were on average more centrally clustered (8.2 miles) around the center point of development than was the case for units permitted post-2010 (12.4 miles).

The number of permitted housing units in the region averaged over 6,000 per year leading up to the mortgage crisis in 2007. After the housing market collapse new permitted units declined dramatically (see **Figure 23**). Permitted units in Canyon County in 2011 were just 10 percent of the number of permitted units in 2006 just

prior to the recession. The economic recovery has resulted in a steady increase in the number of permitted units once again in the greater Boise area. In 2014 the number of permitted units reached over 5,500, approaching the volume of permit activity experience in the pre-recession period.

Figure 23. Permitted Housing Units in Ada and Canyon Counties 2000-2014



Source: COMPASS and Jurisdictions

School Performance Model Methods

The identification of the number of students enrolled in underperforming schools begins with the development of a statewide model of school performance. The model estimates school performance as a function of school-level characteristics, predominantly characteristics of the student population being served. The model attempts to answer the following question: What is the expected performance of any school given the characteristics of the school population? The model is a linear regression model estimated using data on all schools in Idaho. The dependent variable is a measure of the share of students at the school-level meeting proficiency in the statewide Math assessment. The explanatory variables include shares of students who are white, black, Hispanic, Asian/Pacific Islander, eligible for FRL, are designated as receiving Special Education services, are English language learners, the total enrollment in the school, and dummy variables indicating if the school is a middle or high school. The method is similar to the methods employed in the Center on Reinventing Public Education's (CRPE) report *Measuring Up*.[7] Math assessments were selected for this study for two reasons. First, performance on math assessments is likely influenced by reading proficiency, but performance on reading

[7] DeArmond, Michael, Patrick Denice, Betheny Gross, Jose Hernandez, and Ashley Jochim. 2015. "Measuring Up: Educational Improvement and Opportunity in 50 Cities." Center for Reinventing Public Education. Accessed May 10, 2016. http://www.crpe.org/sites/default/files/measuringup_10.2015_0.pdf

assessments are less influenced by math proficiency[8]. Second, math proficiency is strongly linked with future earning potential[9].

The model produces estimates of expected shares of students meeting proficiency standards in math, along with standard errors around these estimates. Actual school-level performance can be then be compared with the model predictions. Where actual school performance is sufficiently different than predicted performance (taking into account the prediction's standard errors), schools can be characterized as underperforming, performing as expected, or performing above expected levels.

School-level models were estimated based on data from 2013 statewide assessments (ISAT) and from 2015 assessments. Between 2013 and 2015 Idaho adopted a new assessments based on the Smarter Balanced Assessment Consortium and designed to support Common Core curriculum. Tests were administered in 2014 as well but the Idaho State Department of Education (SDE) does not release these results as 2014 was considered a "test" of the test during the transition to the new assessment program. This transition in assessment also means that analysis of 2013 and 2015 school performance based on these testing data are independent and may not be comparable.

$$Y = \beta_0 + \beta_1(White)_j + \beta_2(Black)_j + \beta_3(Asian)_j + \beta_4(Hisp)_j + \beta_5(FRL)_j + \beta_6(ELL)_j + \beta_7(Size)_j + \beta_8(Size^2)_j + \beta_9(Mid)_j + \beta_{10}(High)_j + \epsilon$$

School Performance Model	2013
R	0.743
R-square	0.552
Adjusted R-square	0.544
N	637

	Coefficient	*Standard Error*	*t Stat*	*p-level*
Intercept	69.08343	6.0148	11.48558	0.
White	0.28745	0.05755	4.99477	7.65345E-7
Black	-1.19659	0.31861	-3.75568	0.00019
Asian	0.53753	0.25415	2.11502	0.03482
Hisp.	-0.05224	0.0677	-0.77161	0.44064
FRL	-0.11003	0.02935	-3.74875	0.00019
ELL	0.30527	0.08625	3.53938	0.00043
SpecEd	-0.68318	0.07974	-8.56705	0.
Size	0.02634	0.00418	6.2943	5.8146E-10
Size^2	-0.00002	3.22136E-6	-5.13266	3.81939E-7
HIGH	-22.57957	1.18178	-19.10638	0.
MID	-10.40493	1.103	-9.43328	0.

[8] Jordan, Nancy C., Laurie B. Hanich, and David Kaplan. 2003. "A Longitudinal Study of Mathematical Competencies in Children With Specific Mathematics Difficulties Versus Children With Comorbid Mathematics and Reading Difficulties." Child Development. 74: 834-850. http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2791887/

[9] Rose, Heather and Julian R. Betts. 2001. "Math Matters: The Link Between High School Curriculum, College Graduation, and Earnings." Public Policy Institute of California. Accessed May 10, 2016. http://www.ppic.org/content/pubs/report/R_701JBR.pdf

School Performance Model	2015
R	0.692
R-square	0.479
Adjusted R-square	0.468
N	552

	Coefficient	*Standard Error*	*t Stat*	*p-level*
Intercept	50.2178	6.66441	7.53522	0.
White	0.15927	0.06266	2.54185	0.01131
Black	0.0478	0.33577	0.14236	0.88685
Asian	0.9695	0.25989	3.73043	0.00021
Hisp.	0.05855	0.07642	0.7662	0.44389
FRL	-0.34024	0.03349	-10.15974	0.
ELL	-0.11101	0.0965	-1.15046	0.25047
SpecEd	-0.61505	0.12512	-4.91584	1.1745E-6
Size	0.00978	0.00472	2.07009	0.03892
Size^2	-5.63991E-6	3.35802E-6	-1.67954	0.09363
HIGH	-14.72552	1.39396	-10.56377	0.
MID	-8.95282	1.18483	-7.55619	0.

For each assessment year the difference between actual and expected performance is calculated for each school, and schools are then sorted into quintiles. For the purposes of this report the bottom performing quintile (20%) of schools are identified as significantly underperforming as compared with similar schools statewide. The school-age population located near each school is estimated as a function of distance to the school and other nearby schools.

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Introduction

April 2019

DETAIL -- PROJECT INFORMATION

Project Cost Adjustment		Compass Other Developer	Elevate BH Project	Gem Prep Nampa BH Project	Future PS BH Project	Forge BH Project
I. *Project Info*						
Sq. Ft.		68,092	53,000	40,040	39,603	39,000
Frame Type		Wood	Steel/CMU	Steel	Steel/CMU	Steel & Wood
Land		1,755,854	966,172	868,708	883,986	782,150
Site Work		1,510,871	905,115	810,393	367,245	1,184,997
FF&E		38,200	200,000		200,000	165,377
	subtotal	1,549,071	1,105,115	810,393	567,245	1,350,374
Soft Costs		1,518,473	923,646	788,589	1,005,919	1,089,695
Construction		8,466,086	6,860,889	5,539,544	5,347,720	4,474,372
Miscellaneous - represents contingency		500,000	232,981	314,998	191,133	165,377
	subtotal	10,484,559	8,017,516	6,643,131	6,544,772	5,729,444
Total Project Costs Excluding Land		12,033,630	9,122,631	7,453,524	7,112,017	7,079,817

II. *Soft Costs*						
Architecture		456,000	292,600	182,000	246,900	225,000
Engineering		409,410	194,900	190,000	148,950	175,000
Direct Project Costs		495,963	308,146	231,589	425,069	572,695
Development Fees		157,100	128,000	185,000	185,000	117,000
Total Soft Costs		1,518,473	923,646	788,589	1,005,919	1,089,695
	cost per sq. ft.	22.30	17.43	19.70	25.40	27.94

Note 1: Cost per square foot is positively impacted by size of project by spreading costs over a larger denominator
Note 2: Both Future and Forge projects required significant impact or utilities fees

III. *Construction*						
Building Construction		7,460,594	6,355,701	5,132,956	4,967,737	4,143,619
Preconstruction and Construction Fees		825,691	435,650	356,601	325,733	330,753
Payment and Performance Bonds		179,801	69,538	49,987	54,250	
Total Construction		8,466,086	6,860,889	5,539,544	5,347,720	4,474,372
plus contingency/projected and actual for completed projects		500,000	232,981	314,998	191,133	165,377
change orders to date		254,780	-	-	-	-
Projected Costs - Construction		9,220,866	7,093,870	5,854,542	5,538,853	4,639,749
	cost per sq. ft.	135.42	133.85	146.22	139.86	118.97
	impact of steel frame	20.00				
	cost per sq. ft. with steel frame comparison	155.42	133.85	146.22	139.86	118.97

Note 1: Constructing a wood framed building is less expensive than using a steel frame, industry estimates this price differences to be $20/sq ft.
There are significant long-term benefits to a strong structure with durability and maintenance
Note 2: Both Elevate and Forge projects included the construction of two separate structures, thereby having a negative impact by increasing the cost per sq. ft.

IV. *Cost per Sq. Ft. - Soft Costs and Construction*						
	as is	157.72	151.27	165.91	165.26	146.91
	with steel frame comparison	177.72	151.27	165.91	165.26	146.91

V. *Fee Analysis*	Compass	Elevate	Gem Prep Nampa	Future PS	Forge
Sub Total Before Finanacing and w/o Land	12,033,630	9,122,631	7,453,524	7,112,017	7,079,817
Less: Developer Fees	(157,100)	(128,000)	(185,000)	(185,000)	(117,000)
Less: Preconstruction and Construction Fees	(825,691)	(435,650)	(356,601)	(325,733)	(330,753)
Project Cost excluding Land, Financing, and Fees	11,050,839	8,558,981	6,911,923	6,601,284	6,632,064
Total Fees	982,791	563,650	541,601	510,733	447,753
Fees as % of Project Costs	8.9%	6.6%	7.8%	7.7%	6.8%

Expansion

Year	School	School Category	Type	Total Project Financing	JKAF	Sr. Debt	Lender	Rate	Amortization	LTV	Type
2014	Vision	Expansion	New	7,000,000							
2015	Sage International	Expansion	Renovation	12,300,000	500,000	6,500,000	Bank Traditional	3.50%	25 YR	93%	Bank Bond TE
					4,500,000	7,800,000	Bank Bonds	3.23%	25 YR	63%	Bank Bond TE
								3.37%		78%	
New Construction											
2016	Alturas International Academy	Start-up	Renovation	7,200,000	2,335,000	4,865,000	Bank Traditional	5.25%	25 YR	68%	Const/Mini Perm
2017	Future Public School	Start-up	New	9,291,465	1,870,000	7,421,465	Bonds	5.60%	30 YR	80%	TE Bond
2017	Gem Prep Nampa	Expansion	New	9,511,182	1,950,000	7,561,182	Bonds	5.60%	30 YR	79%	TE Bond
2017	Gem Prep Meridian	Replication	Renovation	5,553,288	1,380,000	4,173,288	Bonds	5.60%	30 YR	75%	TE Bond
2018	Elevate Academy *	Start-up	New	11,987,649	2,500,000	9,487,649	Bank Traditional	6.75%	30 YR	79%	TE Bond
2018	Treasure Valley Classical Academy *	Start-up	Renovation	4,200,000	1,260,000	2,940,000	Bank	4.92%	25 YR		Const/Mini Perm
2018	Gem Prep Pocatello *	Expansion	Renovation	6,600,000	2,000,000	4,600,000	Bank Traditional	5.30%	25 YR	70%	Const/Mini Perm
2018	Sage Middleton * (Forge)	Replication	New	8,049,851	2,550,000	5,499,851	Bank	5.30%	25 YR	68%	Const/Mini Perm

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Treasure in the Valley

Demographic Changes and New School Opportunities in Ada and Canyon Counties

MAY 2016

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About ECONorthwest

ECONorthwest specializes in economic, planning, and finance with a deep knowledge of the public education sector. Established in 1974, ECONorthwest has over three decades of experience helping clients make sound decisions based on rigorous economic, planning and financial analysis.

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About Bluum

Bluum is a non-profit organization committed to ensuring Idaho's children reach their fullest potential by cultivating great leaders and innovative schools. We work to help Idaho become a national model for how to maximize learning opportunities for children. In partnership with the J.A. and Kathryn Albertson Family Foundation, Bluum plans to help create 20,000 new, high-performing school seats in Idaho in 10 years.

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hope

VECTRABANK COLORADO

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We would like to thank our fellow Bluum-ers Amy Russell, Suzanne Metzgar and Marc Carignan. Amy gave important feedback on drafts of the report and planned its formal release. Suzanne helped plan the event that preceded the release of the report, while Marc gave feedback and encouragement along the way.

This report makes use of a number of publicly available datasets including data from the 2000 and 2010 U.S. Census of Population, the American Community Survey, a compilation of building permit data assembled by the Community Planning Association of Southwest Idaho (COMPASS), population forecasts from COMPASS, and various data made available through the Idaho State Department of Education. The authors of this report are grateful for the assistance others provided, but all errors and omissions are our own.

The cover photo for this report was taken by Amy Russell. The maps developed for this report make use of a base layer designed by Stamen Design based on data from OpenStreetMap.

Map tiles by Stamen Design, under CC BY 3.0. Data by OpenStreetMap, under CC BY SA.

Treasure in the Valley:

Demographic Changes and New School Opportunities in Ada and Canyon Counties

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Foreword

Idaho's families and student demographics are changing. Not only is the state's total population growing (Idaho is the 10th fastest growing state), but Gem State families are increasingly urban, non-white and lower income. This was the big takeaway from the 2014 ECONorthwest report *Shifting Sands: Idaho's Changing Student Demographics and What it Means for Idaho*. That report confirmed what many of us who live in communities like Boise, Meridian, Twin Falls, Idaho Falls or Coeur d' Alene see daily as we pass new home construction sites, hunt for apartments, sit in traffic and watch new school buildings pop up like wild flowers.

Nowhere are these dynamics of growth more prevalent than in the Treasure Valley, the area of focus for this new report. Since 2000, the school-aged population in the Treasure Valley has grown by 39 percent (see **Table 1**). This is significant when you consider that the change in school-aged population has only increased by 12.8 percent in the entire state within the same number of years.

Table 1. Treasure Valley School-Age Population 2000-2014 and 2019 Projections

School Age Population	2000	2010	2014	Proj. 2019
White	76,533	98,520	100,056	100,100
Non-White	8,044	13,304	15,024	17,200
Two or More Races	3,168	5,874	6,827	8,000
All Races	**87,745**	**117,698**	**121,907**	**125,300**
Hispanic/Latino (all races)	10,369	21,020	23,552	26,700

Source: U.S. Census, ACS, Nielson and ECONorthwest

With this growth come challenges, but with the challenges also come tremendous opportunities. Specifically, Bluum is most interested in where new innovative schools (charter, district or even private) should be built and opened to best meet the needs of the areas' growing and increasingly diverse student demographics. Bluum, with the support of the J.A. and Kathryn Albertson Family Foundation, is committed to helping create 20,000 new, high-performing school seats, by 2024. We want to make sure that the new seats we advocate for are actually created in the communities with the greatest need and demand for better school options.

To help us figure all this out we went back to the crack research team at ECONorthwest. We asked their Project Director, and the author of the *Shifting Sands* report, Matthew Kitchen to build on the earlier work to help us begin to answer three essential questions specific to the Treasure Valley:

- Where can we expect to see the greatest growth in the pre-K-12 school-age population?
- Where are the highest concentrations of low-income and minority school-aged children?
- Where are current schools underperforming based on the students they serve?

We felt that if we could get insights to these questions we would have a better sense of where new schools in the Treasure Valley should be built. Of course, each school district in the Ada and Canyon Counties have similar studies of their own, which are valuable and important for their planning. But, we wanted to look at this as a regional issue rather than just a school district matter. We wanted this information for all school providers (district, charter and private) as well as for local community leaders, business leaders and others involved in growing and supporting schools and education programs.

Matthew Kitchen and his colleagues at ECONorthwest combined their skills and experience in urban planning and public education to look at demographic trends and school performance in the Treasure Valley. This new report, *Treasure in the Valley: Demographic Changes and New School Opportunities in Ada and Canyon Counties*, uses data from the U.S. Census and Community Planning Association of Southwest Idaho (COMPASS) to project the change of school-aged population through 2025. The ECONorthwest team also tapped the American Community Survey data to look at current concentrations of low-income, non-white, and Hispanic populations within the valley. And, the research team created a performance model from a combination of ISAT math scores and school-level demographics for district and charter public schools. The performance model reports how well each school does in comparison to an expected performance (see full report for notes on methodology).

In interrogating our three essential questions about student growth, school quality and change in the Treasure Valley, the research shows the following insights:

- The Treasure Valley saw overall student enrollment grow by nearly 12,000 students between 2010-2015. The region is expected to add another 3,400 students by 2019, and nearly 65 percent of these students will be from minority backgrounds.
- By 2019 it is projected that there will be a net increase of 9,000 households in the region earning less than $50,000 a year; half of those earning less than $25,000.
- Over 10,000 students in the Treasure Valley (about ten percent of K-12 students) attended schools in 2015-16 that performed significantly worse than expected on their math ISATs.
- "Hot spots" where the demand and need for new and better school options is greatest cross district and community lines within sections of Boise, Caldwell, Meridian, Nampa, and Kuna.
- Nampa is highlighted in our analysis as an area that could benefit significantly from new school investments and support. It is important to note, this has already begun with district innovations and new charter development.

Treasure in the Valley aims to help local education leaders, community leaders, businesses, and philanthropies support wiser and more strategic investments in schools. But, it also breaks new ground by using empirical data across two counties to site schools based on the needs of changing communities. As Idaho and other states, especially in the West, become less rural, more diverse, and more expansive with school choice policies research like this will continue to be needed. A new, high performing school targeted at a "hot spot" of student growth and educational need can make a sizeable difference for not only a community's families and children, but also to the overall economic and civic health of the community.

We hope this report can stimulate some important conversations and be a useful tool for everyone involved in designing the future of education in the Treasure Valley.

Angel Gonzalez, Director of Research
Terry Ryan, Chief Executive Officer

1. Introduction and Study Purpose

Bluum, with support from Building Hope and Vectra Bank, commissioned this study by ECONorthwest to understand how the Treasure Valley's changing demographics and housing growth present opportunities for creating innovative school options for the region's expanding and increasingly diverse student population.

With a high quality of life and strong economy, the Treasure Valley is growing. The Valley is host to one of the youngest urban populations in the U.S. And that population is getting increasingly diverse. The future of the Valley economy depends on successfully preparing tomorrow's workforce by educating today's youth. Idaho's school systems get below average marks[1] for student achievement, school finance, support for teachers and other indicators of a healthy education environment. And in the face of low graduation rates and district fiscal challenges many Idaho students and families are seeking enrollment in schools of choice—district public, charter public, and private schools that offer families education options outside of those bound by their neighborhood. Waiting lists for many of the highest quality charter schools have been growing. New school services are needed to provide a wider range of quality choices for parents and students, and to drive innovation across the education sector.

This study focuses on Idaho's most populous urban region, the Treasure Valley, and seeks to describe the current and expected future conditions that will help shape the demand for new school services and programs.

The goals of this study are to:

- Understand near-term trends in changing demographics of school-age children for Ada and Canyon counties.
- Identify "hot spots" in development and where demand for new school services may be greatest.
- Discuss school quality in these growth areas - how many students are attending low performing schools or could benefit from different school options?
- Discuss how the changing student demographics might be served by new school options.

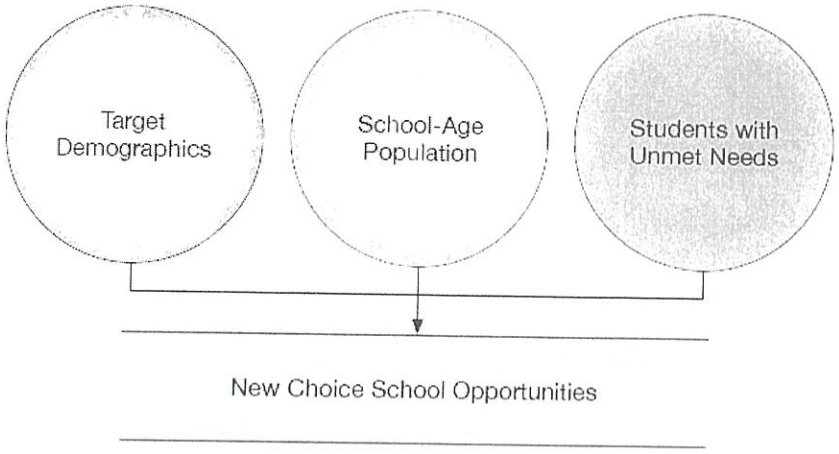
For this project ECONorthwest has combined standard market research techniques with our deep knowledge of the public education sector and data sources in order to provide Bluum with an integrated set of information about the market potential for new school services in the Treasure Valley.

This report begins (**Section 2**) with a brief description of the changing demographic and economic environment in which school services are offered. This is the underlying case for new school investment. It then presents an approach to combining together a wide variety of different geographic measures into a single index of school opportunity (**Section 3**). The School Opportunity Index is a shorthand way of identifying and mapping locations where new school services might best be deployed in order to meet a variety of community and educational needs. The key factors involved relate to demands for new school services in three general categories:

1) the location of target populations,
2) the presence and growth in school-age populations, and
3) the location of students with unmet academic needs.

[1] Education Week. 2014. Idaho State Highlights: A special supplement to Education Week's Quality Counts 2014. Accessed May 10. http://www.edweek.org/media/ew/qc/2014/shr/16shr.id.h33.pdf.

Figure 1. Factors Influencing New School Opportunities



The report then examines more closely (**Section 4**) a number of specific measures across these categories that together constitute the school opportunity index. Then maps of localities are presented (**Section 5**) that depict school opportunity within individual communities. The report ends with some general conclusions and there is an Appendix that describes some technical methods.

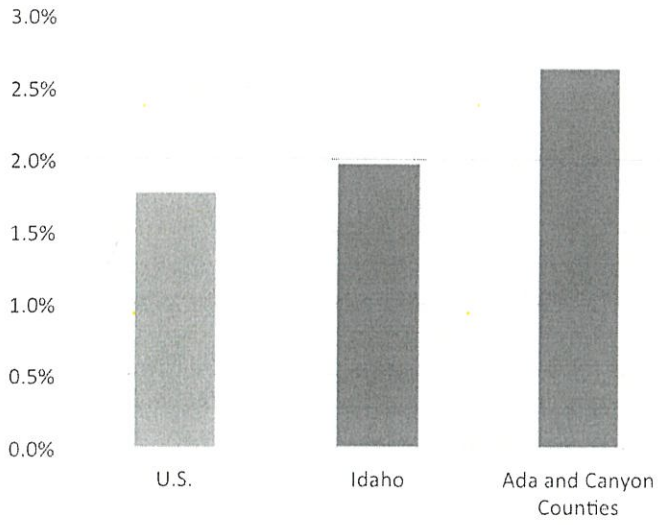
The report is intended as a tool for use by a broad set of stakeholders involved in school siting decisions. As is true of any tool, it has limitations and should be supplemented with local knowledge about student needs and school service delivery organizations' constraints and opportunities.

2. The Importance of New School Services

The Treasure Valley Economy is Growing

Since the recession the Treasure Valley has seen vigorous job growth, experienced a strengthening real estate market, and has one of the highest shares of population under-19 of any urban area in the U.S. The evidence for this growth is seen in crowded classrooms in a number of schools throughout the urbanized area[2]. Since the bottom of the recession employment growth in the Treasure Valley has outpaced the state and the rest of the U.S. economy (see **Figure 2**).

Figure 2. Employment Average Annual Growth Rates Since September 2010



Source: U.S. Bureau of Labor Statistics

Wage growth in the Boise area has also been strong since the recession (2.4% annual average), outpacing the state of Idaho (2.1%) and the U.S. as a whole (2.0%). Growth in jobs and income is evidence of a stable and expanding economy that has revived the area's housing market.

A Rebounding Housing Market

The Treasure Valley has experienced a substantial housing market recovery since the markets lost significant value during the sub-prime mortgage crisis and subsequent recession. In late 2006, just prior to the mortgage crisis average home values in some parts of Boise were at a high of between $150 - $190 on a square foot basis. Two years later values had dropped to between $100 - $150 per square foot. At the end of 2015 home values in these same parts of Boise had recovered to 95% of their pre-recession high. A similar pattern is seen throughout the Treasure Valley. Annual average growth rates for homes within the Treasure Valley measured since the bottom of the housing market (at the end of 2010) have been 7.7%. Annual average growth in home values for

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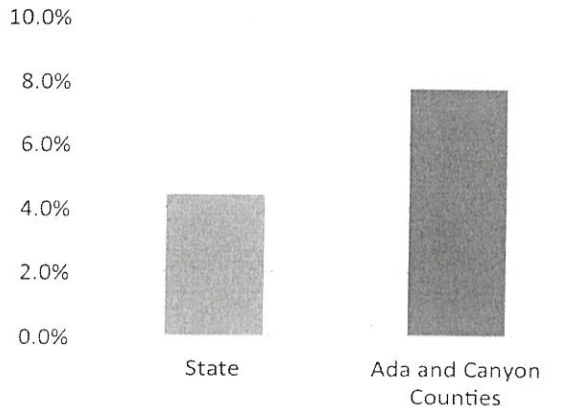
[2] Richert, Kevin. 2015. "Districts Face Rising Enrollment Across Idaho." Idaho Ed News, September 3. Accessed May 10, 2016. http://www.idahoednews.org/news/across-idaho-districts-face-rising-enrollment/

all of Idaho during this period was 4.4% (**Figure 3** below) and was the 12th highest growth rate in home values amongst all states. The strong growth in home values in the Treasure Valley is an indication of the overall demand for housing resulting from a strong economy and a desirable local quality of life.

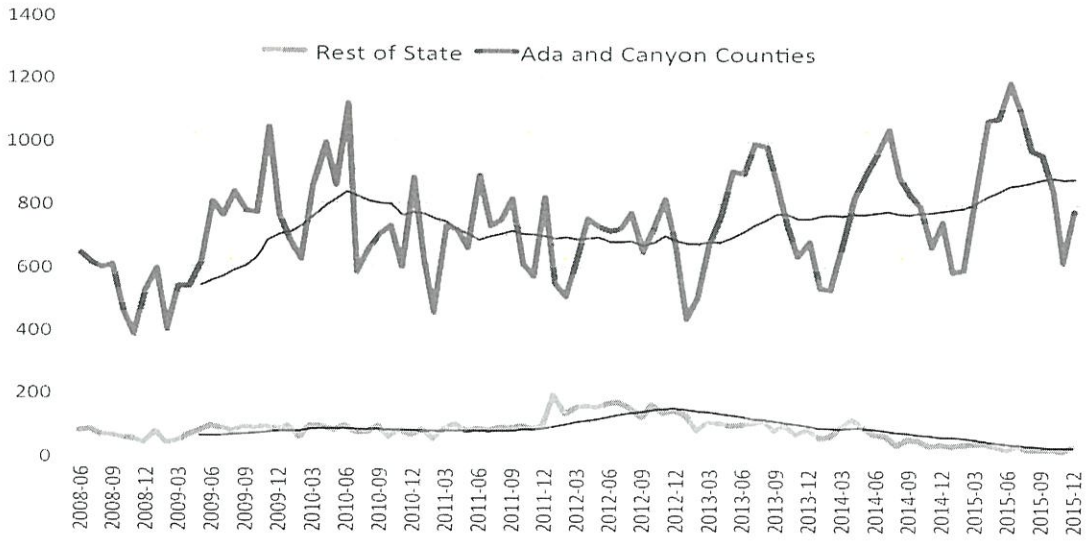
Figure 3. Annual Average Growth in Home Values on a Sq. Ft. Basis



Source: data from Zillow, ECONorthwest

The Treasure Valley comprises the largest housing market in Idaho. Monthly home sales date from Zillow demonstrates that the activity of this market has been increasing since the general collapse of the housing markets in 2007. **Figure 4** below displays monthly home sales and a 12-month moving average (black lines in graph) of sales for the region and the rest of Idaho. The dynamic nature of the growth in the market is demonstrated in growth in home sales volume that precedes the rest of the state, and that continues to be strong even as home sales volumes for the rest of the state have flattened. With an expanding residential market comes growth in families with school-age children, thus increasing school enrollments. This population growth is evident in recent census data and is expected to continue over the near-term.

Figure 4. Monthly Home Sales in the Treasure Valley and Rest of Idaho

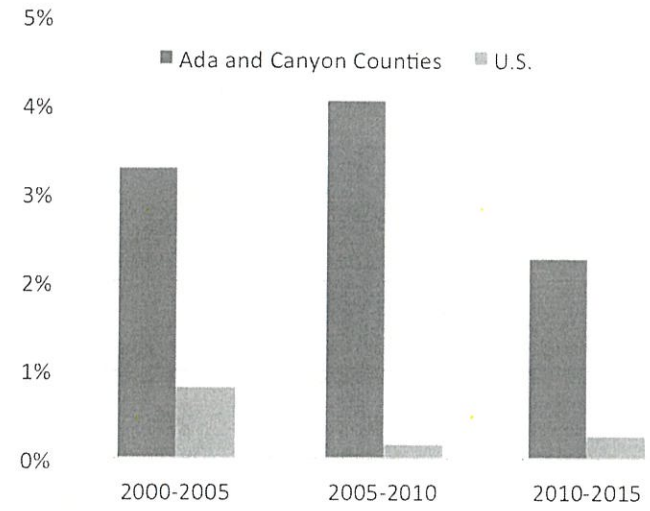


Source: Data from Zillow, ECONorthwest

Increasing School Enrollment

The number of students enrolled in public schools in the Treasure Valley region rose dramatically during the pre-recession period. And since 2010 enrollments have continued to increase. Public schools in the Treasure Valley saw enrollment grow by nearly 12,000 students, or 2%, between 2010-2015. Charter schools in the region grew by over 11% during the same period while public school enrollment in the U.S. grew by less than one-half of one percent (see **Figure 5** below).

Figure 5. Percent Change in Enrollment in Treasure Valley and U.S.



Source: ISDE and National Center for Education Statistics

New School Construction

Public school districts in the Treasure Valley where enrollment increases have been largest struggle to provide sufficient school capacity to meet demands. School construction is dependent on the successful passage of local capital bond measures. The upfront costs and long-lived nature of these investments in new buildings makes developing and garnering support for these capital plans a challenge for districts. Conventional wisdom about scale economies of school construction[3] often result in fairly large increments of new construction[4]; elementary schools sized for 500 or more students and middle and high schools that accommodate between 1000 to 2000 students. And at some point growth in enrollments necessitates these new investments.

The West Ada School District plans to open a new elementary school and a new middle school in 2017. Hillsdale Elementary will open near the corner of West Amity and South Eagle roads and accommodate 650 students. Victory Middle School will open near the corner of West Overland and South Stoddard roads with a capacity of 1,000. And Meridian High School is undergoing a remodel that will be complete before the 2017-18 school year,

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[3] Vincent, Jeffrey M. and Deborah Mckoy. 2008. "The Complex and Multi-Faceted Nature of School Construction Costs: Factors Affecting California." AIA Community Council. Accessed May 10, 2016. http://citiesandschools.berkeley.edu/reports/K-12_CA_Construction_Report.pdf

[4] Humann, Cheryl, Robert Palaich, Mark Fermanich, and Shawn Stelow Griffin. 2015. "Final School Size Study Report: Impact of Smaller Schools." APA Consulting. Accessed May 10, 2016. http://marylandpublicschools.org/adequacystudy/docs/SchoolSizeReport071615.pdf

increasing capacity by 200 students. The Vallivue School District is completing construction on Ridgevue High School (capacity 1,800) near the corner of Madison and Linden roads in Nampa, and has broken ground on Elementary School #7; which will have a capacity of 800 students. Boise School District has no current construction plans but under its 2006 bond measure constructed East, South and West junior high schools; Grace Jordan, Whitney and Morley Nelson elementary schools; and Frank Church High School. The Nampa School District is planning to open an innovative high school choice for the 2017-18 school year, having just received a major grant to fund the school's first two years of operation.

A Changing School-Age Population

Public school enrollment has mirrored the region's growth in school-age populations. Since 2000 the region has seen a net increase in school-age population (years 5 – 17) of over 34,000. And that growth is expected to continue. Between 2014 and 2019 there will be an additional 41,000 people in the region and 15,000 households. And there will be an additional 6,100 households with children. Population projection estimates provided by Nielson anticipate a net increase in the school-age population of nearly 3,500 by 2019. The inflow and outflow of households and the aging of population cohorts will also bring changes in the demographic composition of the school-age population within the region. The Treasure Valley school-age population will altogether become less white and more Hispanic. This is the continuation of trends evident since 2000.

Table 2. Treasure Valley School-Age Population 2000-2014 and 2019 Projections

School Age Population	2000	2010	2014	Proj. 2019
White	76,533	98,520	100,056	100,100
Non-White	8,044	13,304	15,024	17,200
Two or More Races	3,168	5,874	6,827	8,000
All Races	**87,745**	**117,698**	**121,907**	**125,300**
Hispanic/Latino (all races)	10,369	21,020	23,552	26,700

Source: U.S. Census, Nielson and ECONorthwest

The strong regional economy will create more prosperity and attract new households, but it will also result in additional households with modest means living in the region. In 2019 it is projected that there will be a net increase of 9,000 households in the region earning less than $50,000 a year; half of those earning less than $25,000. The growth in student-age population and its increased racial and economic diversity will present an evolving set of demands on local school services. In such a dynamic setting there will be significant benefits from the development and deployment of new school services. New, high quality schools have an important role to play in educating this growing population by offering students a diverse range of educational opportunities.

School Performance

In addition to growth in student populations and enrollments, new high-quality school choices are needed in the Treasure Valley to better serve students currently enrolled in schools struggling to advance student performance. In this study school performance is measured by examining the share of students that meet proficiency standards on the statewide math assessments. Math assessments were selected as a bellwether measure of student achievement. Actual shares of students meeting proficiency for each school are compared with expected student proficiency given the performance of other similar schools statewide. The expected performance of schools is predicted by a model described in the **Appendix** to this report. Schools are considered to be

underperforming when the actual shares of student meeting proficiency are significantly lower than is the case for similar schools statewide. This definition of underperformance is admittedly narrow and is not observed over multiple years. As a result, the measures should be understood for what they are – not an assessment of individual school quality but rather a general indicator of where there are students who might benefit from a broader array of school choices.

School-level models were estimated based on data from 2013 statewide assessments (ISAT) and from 2015 assessments. Between 2013 and 2015 Idaho adopted a new assessments based on the Smarter Balanced Assessment Consortium and designed to support Common Core curriculum. This transition in assessment platforms means that analysis of 2013 and 2015 school performance, based on these testing data, are independent and are not comparable. We have included both 2013 and 2015 results independently in our final index.

In the Treasure Valley there were more than 18,000 students enrolled in significantly underperforming schools (in the bottom 20% of performance on the math assessment as compared with similar schools across the state) in 2013. There were just fewer than 10,000 students in significantly underperforming schools (by this measure) in 2015 (see **Table 3**). Between 2013 and 2015, again noting the change in tests, the total share of students in the Treasure Valley meeting standards in math declined from 77 percent to 38 percent. However, the share of Treasure Valley students enrolled in schools that significantly underperformed when compared with similar schools statewide declined.

Table 3. Students Enrolled in Schools Grouped by Performance Quintile for Math Assessments

	2013		2015	
Performance Quintile	Enrollment	Share	Enrollment	Share
Lowest Quintile	18,752	18%	9,960	9%
Second Quintile	26,770	25%	19,985	19%
Third Quintile	23,433	22%	24,042	22%
Fourth Quintile	22,812	21%	27,087	25%
Highest Quintile	15,378	14%	26,071	24%

Source: ECONorthwest, data from ISDE

The Need For New School Services

In summary we find that the Treasure Valley has a strengthening economy, with a growing population. This population is notably younger than is typical for many U.S. metro areas. School enrollments, like school-age populations, have increased in recent years and will continue to do so. Many school districts in the area are challenged to provide increased school capacity and expanded programs. And some schools struggle with getting kids to meet state standards. All these factors point to the importance of actively pursuing the development of new choice school options for the residents of the Treasure Valley. One very important question, however, is where should these school options locate in order to best serve the expanding needs of Treasure Valley kids over the next 5-10 years?

3. A School Opportunity Index

By virtue of economic growth, a young population, and inconsistent performance across existing schools – new school choices will be an important part of meeting the Treasure Valley's needs over the next decade. It is the premise of this report that schools of choice should strategically locate within the region in order to best meet emerging needs. There are a large number of potential factors that contribute to the where new option schools might locate, but primary factors can be categorized as follows:

- The location of target populations of interest (e.g. populations of non-white, Hispanic and persons living in poverty)
- The location and expected growth in the school-age populations
- The location of students currently enrolled in underperforming schools

New school services are needed most where existing target populations (minority and low income students) are concentrated, where the expectations of school-age population growth is greatest, and where existing student needs are not adequately met by current programs. These are the factors selected in order to identify potential priority locations for investments in new school services and programs. These factors are clearly not the only ones that could be used for this purpose. Instead these represent a reasonable approach to developing a high-level understanding of new school opportunities in the Treasure Valley. The results of this effort should be used in combination with other local knowledge about school program siting opportunities and needs.

Each of the factors is described in greater detail in **Section 4** of this report. For purposes of identifying new school opportunities the factors are best considered in combination. And meaningfully combining many measures together is always a difficult proposition.

Bringing together many factors to highlight new opportunities for school placement is a challenging exercise. First, each factor must be measured in some common unit (in this case each factor was rendered into a common spatial unit). Creating a common spatial unit of analysis can involve the translation of values from one spatial unit to another. This introduces some degree of measurement error. Second, the variability of observed values for each factor must be normalized. And finally, the importance of factors, measuring very different phenomena must be determined. Once all these steps are performed factors can be combined into an index.

This study has developed a School Opportunity Index from the various factors described in more detail later in this report. Each of the three factor categories is given equal weight in the final index. Factor weight are best provided by the parties involved directly in a decision process. This report employs equal weights as a starting point, but this assumption could be modified if one factor is considered more important than others. Measures for each factor are normalized[5] before they are combined into the School Opportunity Index. At the end of the process each 1-mile grid of the Treasure Valley is assigned an index value. Most grids cells have an index value of less than one, and grid cells with an index above one are considered to be meaningful candidates for new school services.

Such an index is a shortcut for understanding the relative opportunities for new school services across the urban geography. As a shortcut, it is an efficient means of conveying information, but at the expense of some fidelity of meaning that is contained in the individual factors that lie beneath the index. Indices should be used appropriately, as a means of narrowing in on some dimension of a problem or phenomenon. In this case the School Opportunity Index gives some insights into generally where new school services might best be located. But final decisions about the siting of those services need to dive deeper into the local environment to better understand opportunities and constraints.

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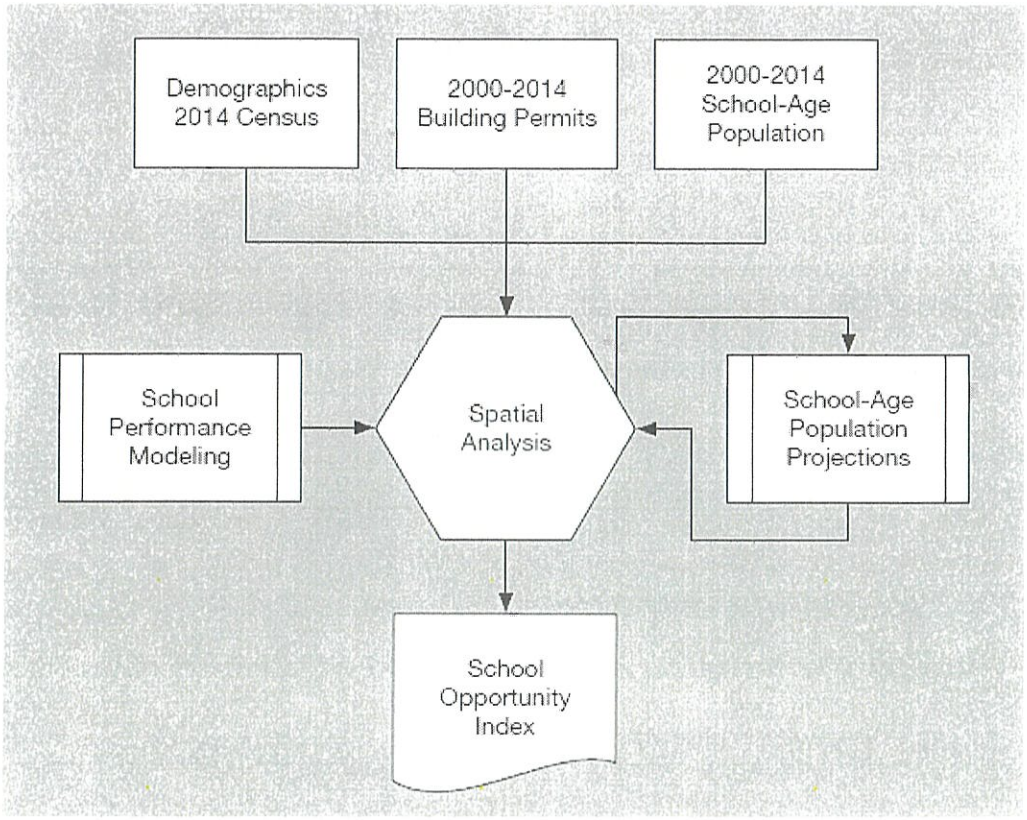
[5] As a result of a normalization process it is the highest 10 percent of each factor in the index that contributes meaningfully to the index value.

Figure 6. Development of School Opportunity Index



4. Factors Contributing to the Need for New School Services

Public schools must meet a diversity of student needs while maintaining an appropriate degree of standardization across the services they provide. The need to standardize arises both from principle and necessity. Public services should be fairly administered, and within available budgets. These challenges often limit the ability of traditional public school providers to innovate and specialize in the delivery of education services. Yet innovation is needed. Charter schools, and other public schools of choice, strive to meet the needs of students that might not otherwise be met by other available public school options. Private school programs also serve an important role in addressing the diversity of student needs. Many of these schools are driven by mission to serve students with unique requirements or disadvantaged backgrounds. In total, the education sector has an obligation to provide broad access to high quality educational services and strive to improve educational outcomes for all students.

It is the premise of this report that schools of choice should strategically locate within the region in order to best meet emerging needs. There are a large number of potential factors that contribute to the need for choice schools. What follows is a closer examination of some of the most important factors (grouped into three overarching categories) that will help to define the market for new school services.

- The location of target populations of interest (e.g. populations of non-white, Hispanic and persons living in poverty)
- The location and expected growth in the school-age populations
- The location of students currently enrolled in underperforming schools

The locations of target populations within the greater Boise region can be understood through an examination of data from the American Community Survey (ACS) collected by the Census Bureau. The ACS is an ongoing survey providing information about the nation and its population on an annual basis. The most current information about local population demographics is associated with the 5-year estimates covering 2010-2014. Census block group estimates of population demographics have been superimposed onto a hexagonal grid of the region where each grid cell represents one square mile.

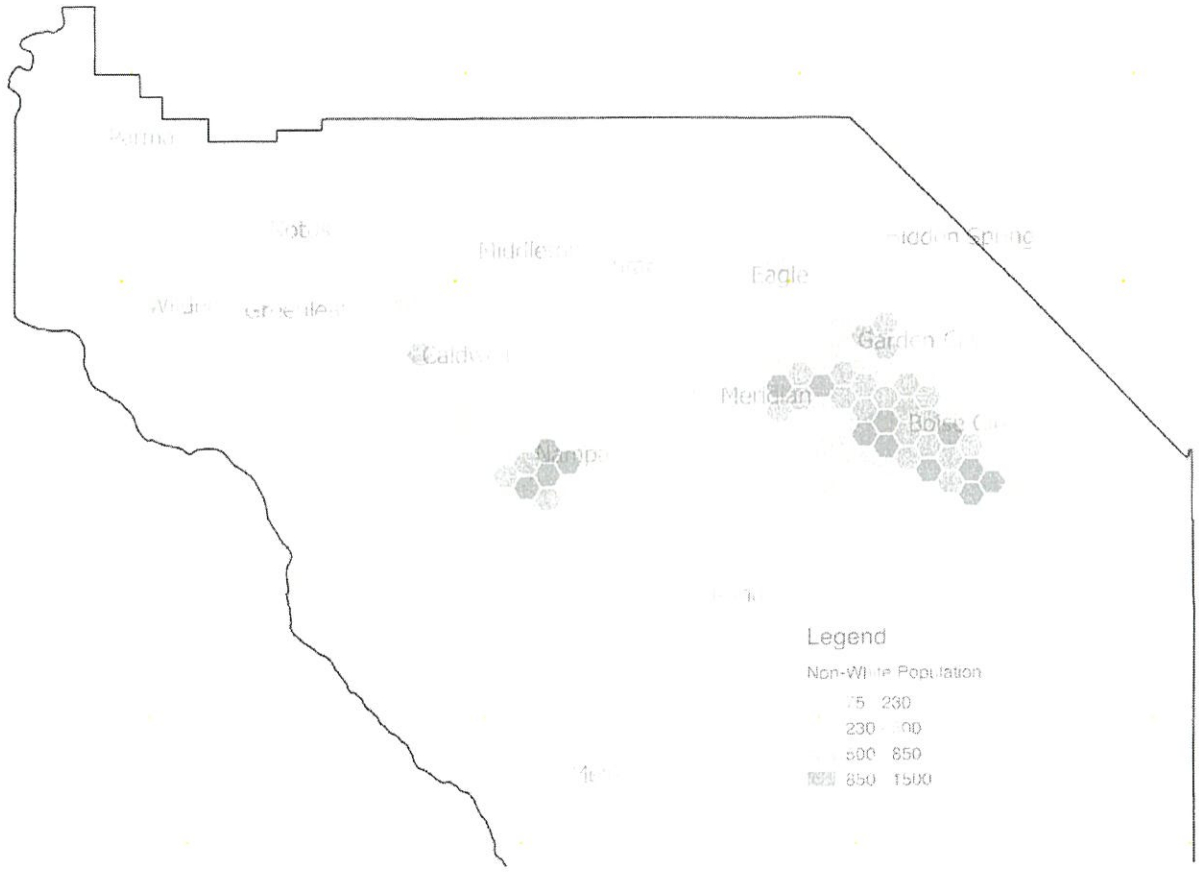
Non-White Population

The current non-white population in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa and Caldwell. The population (see **Figure 7**) is located:

- In the Boise area bounded by I-184, I-84 and U.S. 20,
- West Boise south of U.S. 26,
- North of Garden City,
- In the neighborhoods to the east of Broadway Avenue,
- East Meridian,
- In central Nampa, and
- Along the I-84 corridor through Caldwell.

The location of the school-age non-white population largely mirrors that of the total non-white population.

Figure 7. Non-White Population 2014 (5-year Estimate)



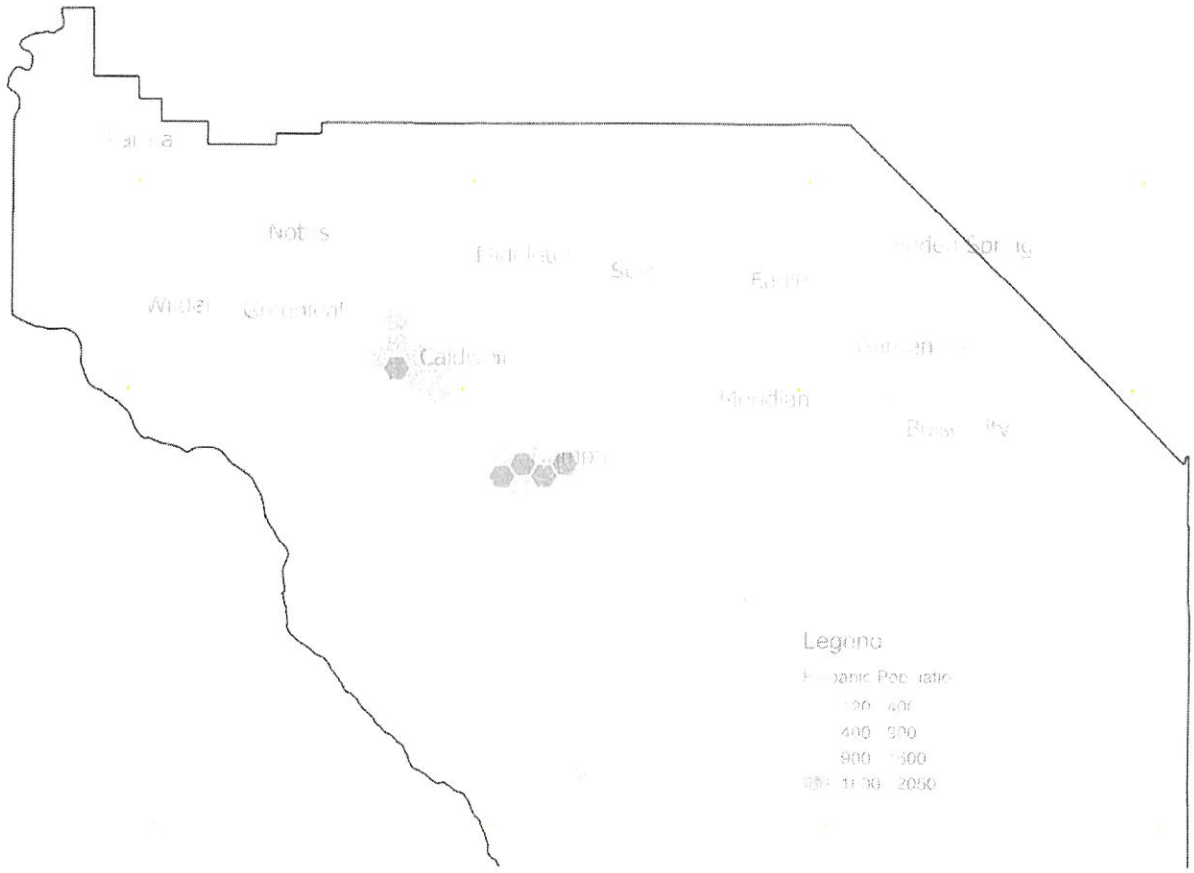
Source: American Community Survey

Hispanic Population

The current Hispanic population (see **Figure 8**) in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa, Caldwell and Kuna – with the highest concentrations in Nampa and Caldwell. There are also population concentrations located:

- In the Boise area bounded by I-184, U.S. 26, and U.S. 20,
- North of downtown Boise,
- In Meridian near the intersection of I-84 and S. Meridian Rd.,
- South of Nampa, and
- South of Caldwell.

Figure 8. Hispanic Population 2014 (5-year Estimate)



Source: American Community Survey

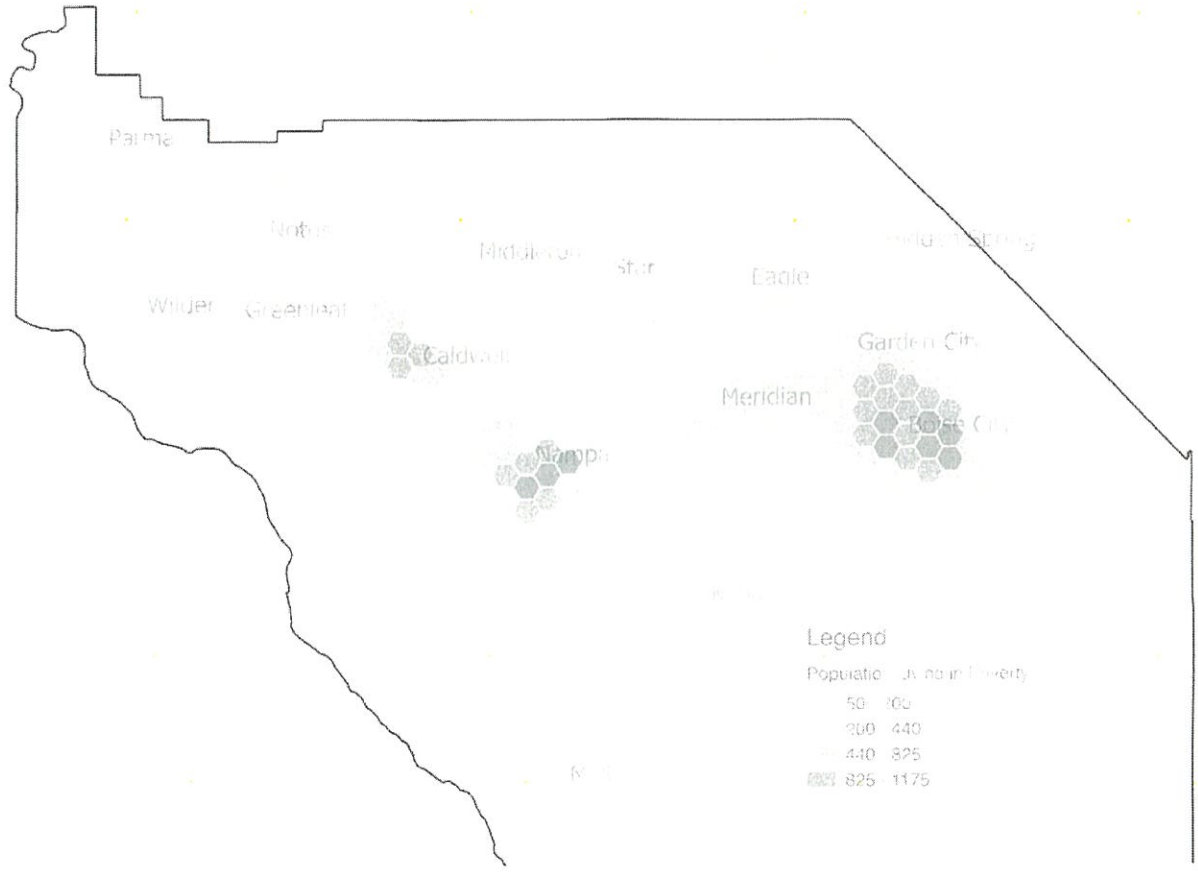
Persons Living in Poverty

The current population of persons living in poverty in the Treasure Valley is concentrated in the primary urban places of Boise, Meridian, Nampa, Caldwell and Kuna (see **Figure 9**). The highest population concentrations are located:

- In the Boise area bounded by I-184, I-84 and U.S. 20,
- In Boise to the north of I-184,
- In the neighborhoods to the east of U.S. 20,
- East Meridian and just north of I-84,
- In central Nampa and Caldwell, and
- In central Kuna.

The location of the school-age low-income population largely mirrors that of the total population of persons living in poverty.

Figure 9. Persons Living in Poverty 2014 (5-year Estimate)



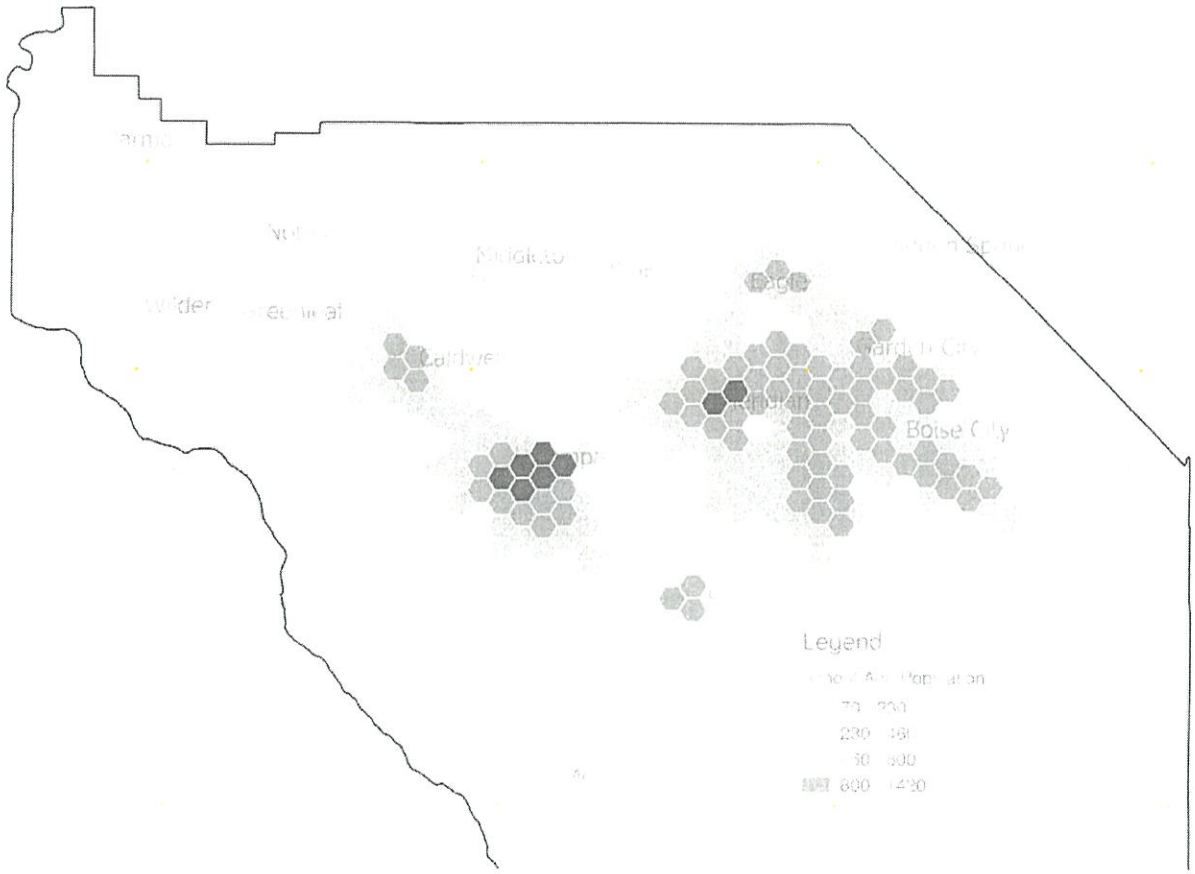
Source: American Community Survey

A key determinant of new school opportunities is the current location of school-age populations (ages 5-17) and expectations about the amount and location of growth in the school-age population.

Current School-Age Populations

The location of the current school-age population largely reflects the total population. But there are some notable differences. The total population is heavily concentrated in the Boise vicinity. The school-age population (shown in **Figure 10**) is relatively more concentrated in Meridian, Nampa, Caldwell, Kuna, Middleton and Eagle than is true for the total population as a whole.

Figure 10. School-Age Population in 2014 (5-year Estimate)

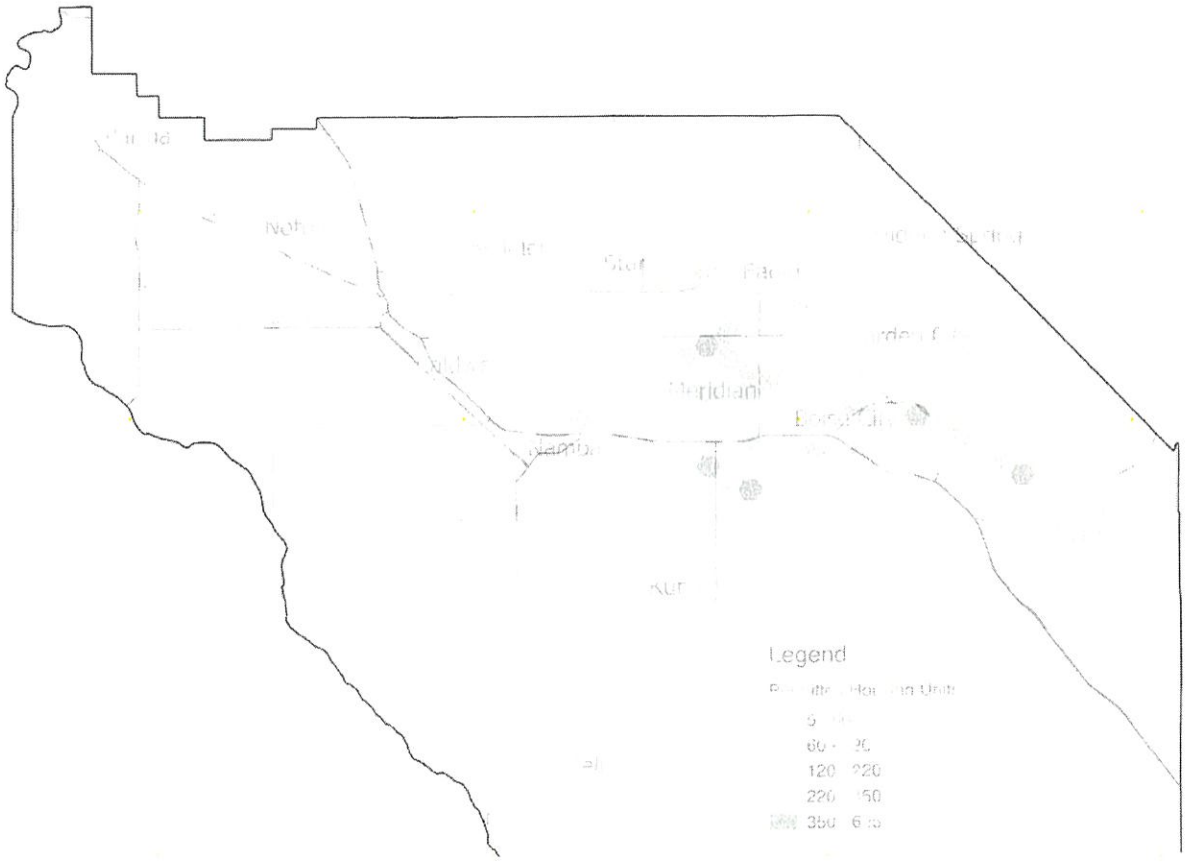


Source: American Community Survey

Housing Development

In order to gain insights into the amount and location of the growth in school-age population it is helpful to examine activity in the land development markets. The permitting of housing units is, by definition, a precursor of new housing growth. Permitted housing units are employed by COMPASS in the development of their population forecasts, and the COMPASS forecasts inform the projections of school-age population developed for this study. This is described in more detail in the **Appendix** to this report. As a result, the location and number of permitted housing units is included as a factor in the school opportunity index. Permitted units between 2010-2014 are displayed in the **Figure 11** below at a 1-mile grid cell spatial resolution.

Figure 11. Housing Units Permitted Between 2010 - 2014



Source: COMPASS, Jurisdictions

School-Age Population Projections

Expectations about the magnitude and location of growth in school-age population are of significant importance to the siting of new school services. This study has developed school-age (5-17) population projections for 2020 and 2025 at a 1-mile grid cell geography. The projections of school-age population are based on a model estimated from block-group data from the U.S. Census and American Community Survey. The methods are described in detail in an Appendix to this report. This very simple model performs well and allows for the development of small geography school-age population projections where future population growth is supplied by the COMPASS population forecasts.

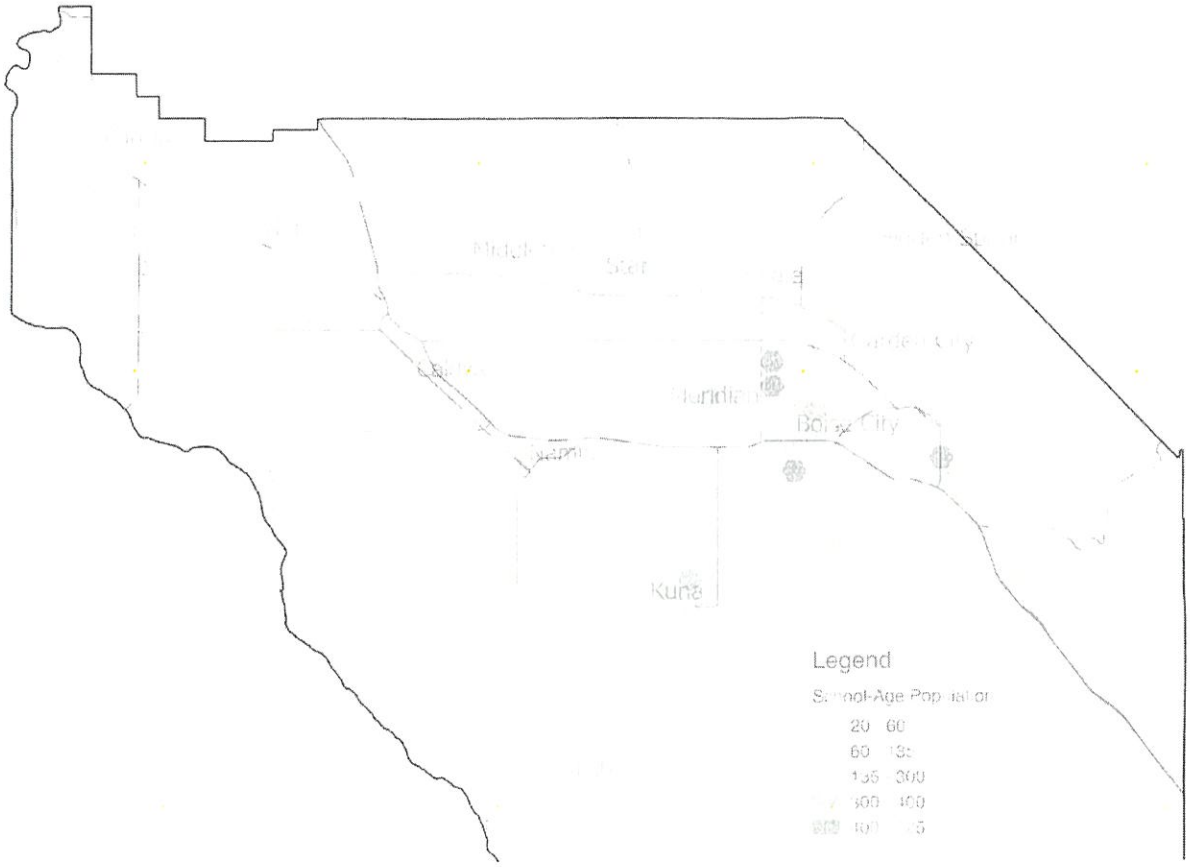
Figure 12 below is a map depicting the projected net change in school-age population between 2014-2025. Areas of expected growth include parts of Boise, north of Garden City, areas west of Meridian (both north and south of I-84), north of Meridian in Star, north of Nampa, in the vicinity of Caldwell and areas surrounding Kuna.

Figure 12. Projected Growth in School-Age Population 2014 - 2025

Source: ECONorthwest, Data from Census, ACS and COMPASS

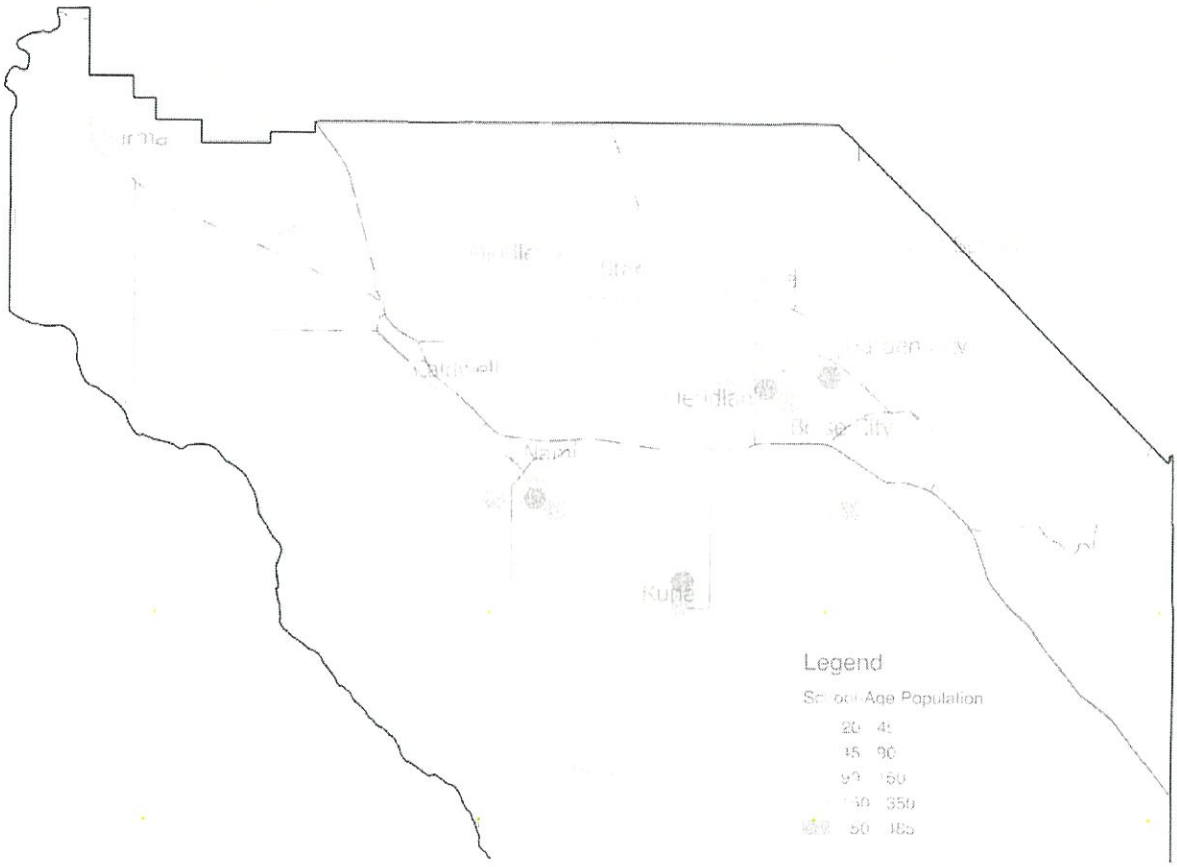
The third factor utilized in the identification of new school opportunities is a measure of the school-age population living proximate to schools that have underperformed as a share of students proficient on the math assessment relative to similar schools statewide (see **Figure 13** for 2013 assessment results and **Figure 14** for 2015 results). A model of school performance was estimated (details are contained in an **Appendix** to this report), where the share of students meeting or exceeding state standards in math assessments is the outcome of interest. The actual performance of schools, as compared with their expected performance, is the determinant of whether a school is underperforming, meeting performance expectations of exceeding expectations. Students enrolled in schools performing in the lowest 20 percent by this measure were identified as being significantly underserved.

Figure 13. School-Age Populations Near Underperforming Schools in 2013 Math Assessments



Source: ECONorthwest, Data from ISDE

Figure 14. School-Age Populations Near Underperforming Schools in 2015 Math Assessments

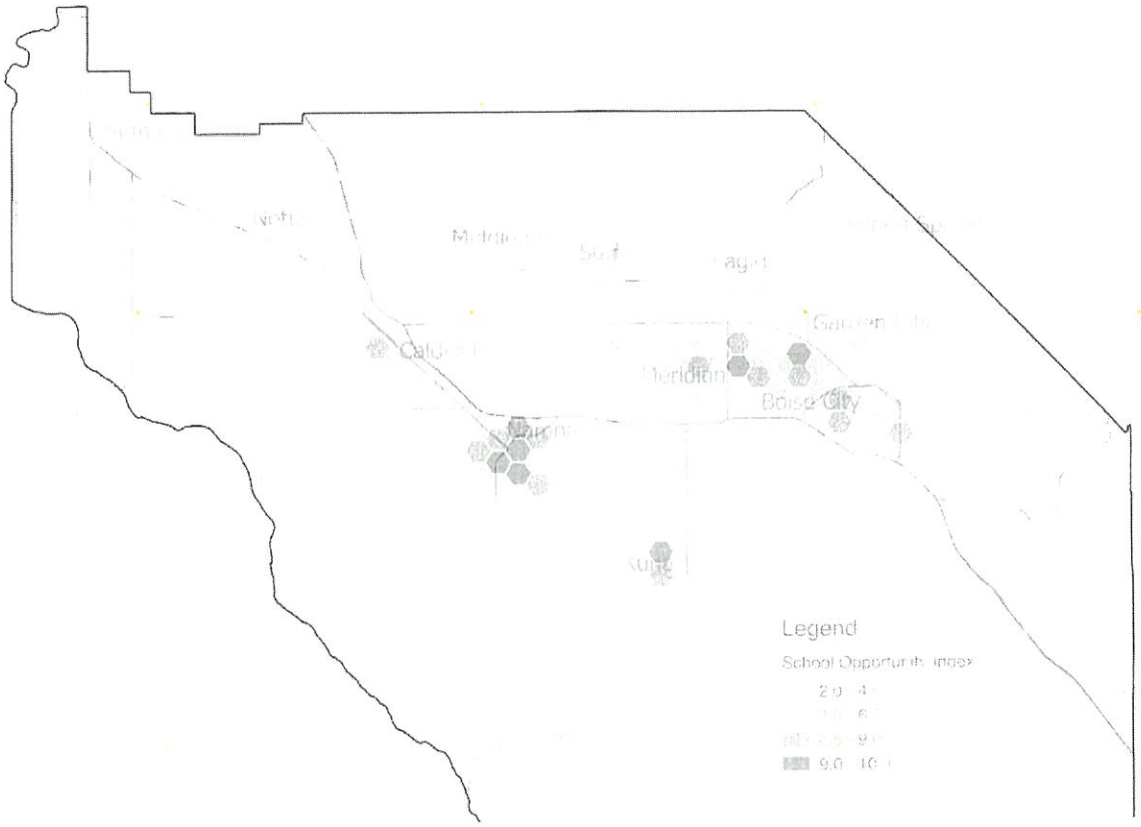


Source: ECONorthwest, Data from ISDE

5. A Summary of School Opportunity

The strongest opportunities for new school services in the Treasure Valley are located in an around the region's largest urban places of Boise, Meridian, Nampa, Caldwell and Kuna (see **Figure 15**). This is not an entirely surprising finding. School services should be directed towards the school-age population; which is located in major population centers. But underneath this high-level conclusion are more nuanced observations. The Nampa area in particular seems to be a strong candidate for new school services. A large area comprised of parts of west Boise and east Meridian also presents strong opportunities. Kuna and Caldwell also stand out given their relatively smaller concentration of population. Each of these urban places is examined more closely in what follows with some observations about the index value's contributing factors.

Figure 15. School Opportunity Index



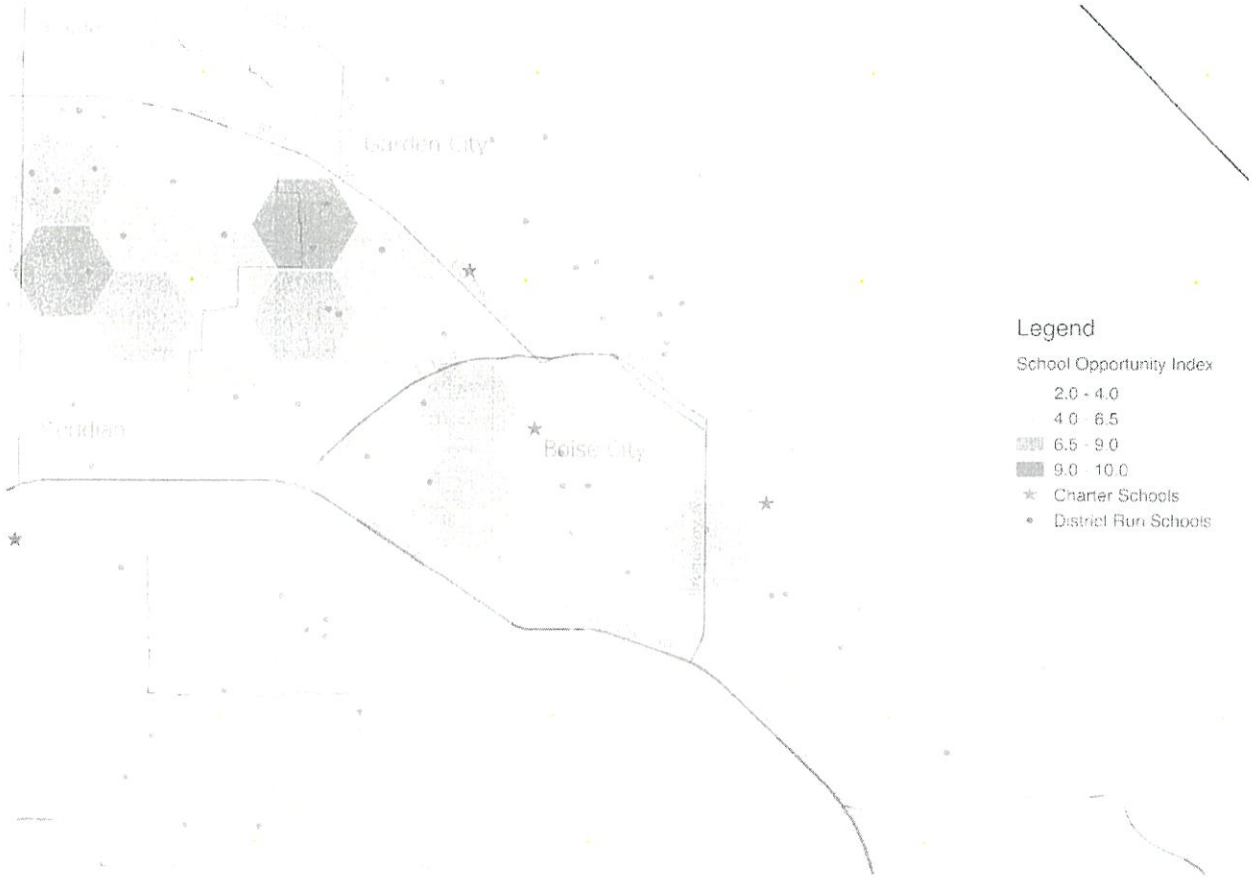
Source: ECONorthwest

Boise

The strongest opportunities for new school services in the Boise vicinity are south and west of downtown. These opportunities (see **Figure 16**) are associated with the following:

- Concentrations of existing school-age population throughout the Boise area and especially west of downtown between U.S. 26 and I-84.
- Expected growth in school-age population in the vicinity of downtown and along the I-84 corridor.
- A large number of permitted housing units southeast of downtown between U.S. 20 and the Boise River.
- Concentrations of people living in poverty in the area bounded by I-184, I-84 and U.S. 20.
- Concentrations of Non-White populations fairly concentrated throughout the Boise vicinity.
- Concentrations of Hispanic populations between Eagle Rd. and Broadway Ave., and U.S. 26 and I-84.
- Students enrolled in underperforming schools in west Boise in 2013 and to a lesser degree in 2015.

Figure 16. School Opportunity Index: Boise



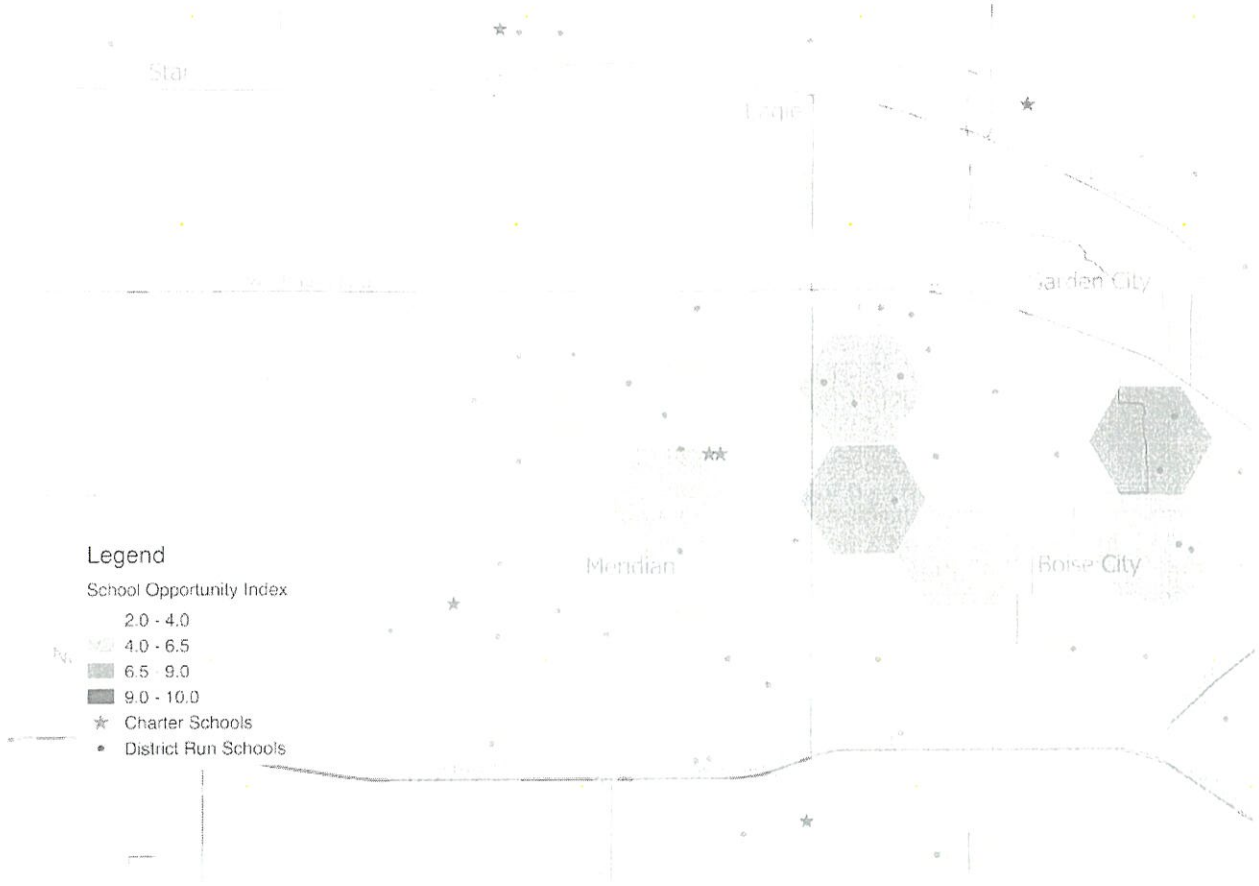
Source: ECONorthwest

Meridian

The strongest opportunities for new school services in the Meridian area are along the U.S. 26 corridor, to the east towards Boise, and south of I-84. These opportunities (see **Figure 17**) are associated with the following:

- Concentrations of existing school-age population within central Meridian, to the east towards Boise and the neighborhoods just to the south of Meridian and Boise.
- Expected growth in school-age population in west Meridian, north of Meridian near Eagle and Star, south of I-84 and along S. Meridian Rd.
- A large number of permitted housing units north and south of central Meridian and along the Eagle Rd.
- Concentrations of people living in poverty in central Meridian.
- Concentrations of Non-White populations within Meridian proper.
- Concentrations of Hispanic populations in south Meridian along the I-84 corridor, along S. Meridian Rd. and in the vicinity of Ten Mile Creek.
- Students enrolled in underperforming schools in east Meridian and areas south of Meridian and Boise in 2013, and to a lesser degree in 2015.

Figure 17. School Opportunity Index: Meridian



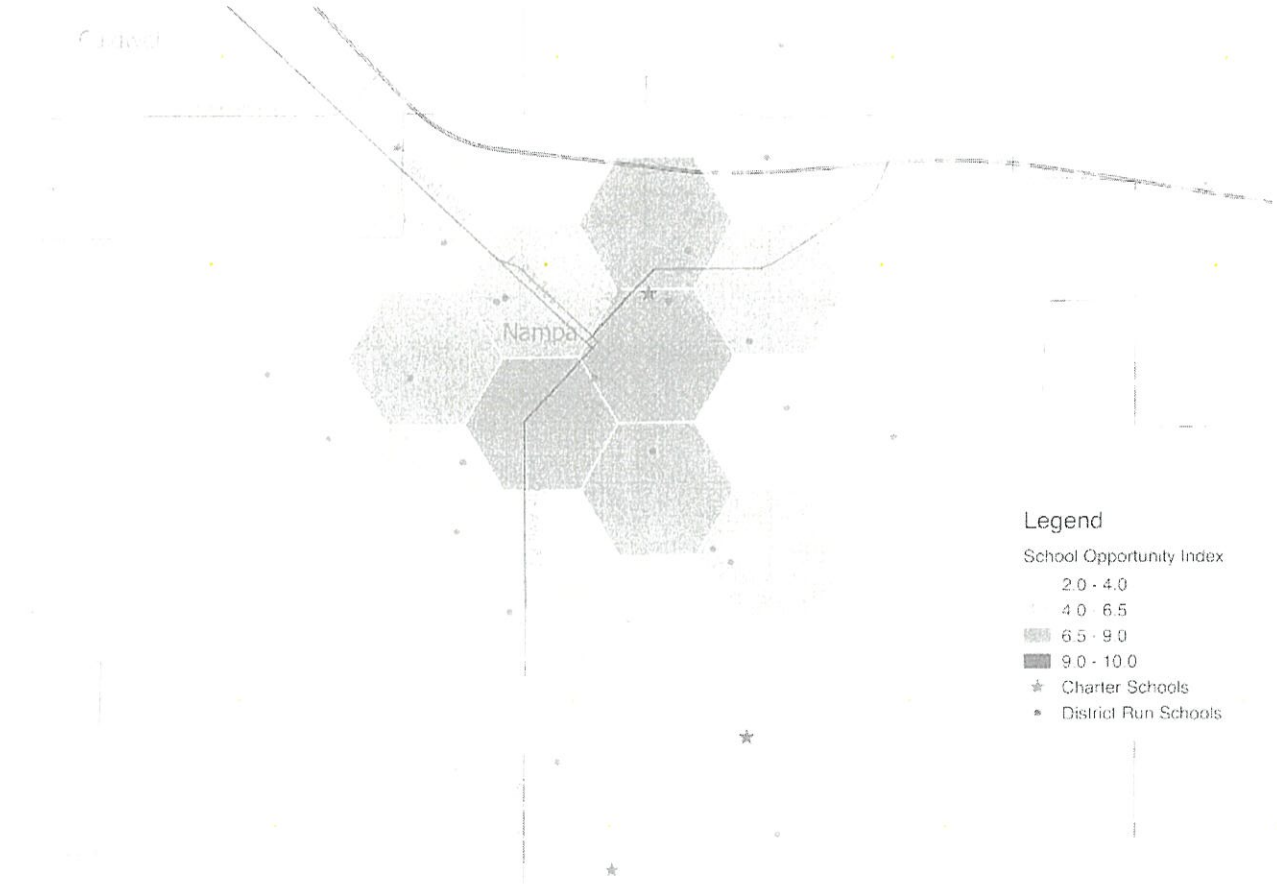
Source: ECONorthwest

Nampa

The strongest opportunities for new school services in the Nampa vicinity are within central Nampa and along the I-84 corridor towards Caldwell. These opportunities (see **Figure 18**) are associated with the following:

- Concentrations of existing school-age population in the vicinity of central Nampa and stretching north towards Caldwell and south towards Kuna.
- Expected growth in school-age population between Nampa and Caldwell south of I-84.
- A large number of permitted housing units along the northern, western and southern peripheries of central Nampa.
- Concentrations of people living in poverty in the center of Nampa, along the I-84 corridor and extending south along 12th Ave. S.
- Concentrations of Non-White populations along the I-84 corridor.
- Concentrations of Hispanic populations in central Nampa along Caldwell-Nampa Blvd. and 11th Ave. N.
- Students enrolled in underperforming schools in the Nampa area in 2015.

Figure 18. School Opportunity Index: Nampa



Source: ECONorthwest

Caldwell

The strongest opportunities for new school services in the Caldwell vicinity are in central Caldwell and along the I-84 corridor towards Nampa. These opportunities (see **Figure 19**) are associated with the following:

- Concentrations of existing school-age population in the vicinity of central Caldwell and stretching south towards Nampa.
- Expected growth in school-age population between Nampa and Caldwell southwest of I-84, and east of Caldwell towards Middleton.
- A concentration of permitted housing units to the south and east of central Caldwell.
- Concentrations of people living in poverty in central Caldwell and along the I-84 corridor.
- Concentrations of Non-White populations along the I-84 corridor.
- Concentrations of Hispanic populations in central Caldwell and along Cleveland Blvd.
- Students enrolled in underperforming schools in the Caldwell area in 2013 and in both Caldwell and to the north in Middleton in 2015.

Figure 19. School Opportunity Index: Caldwell

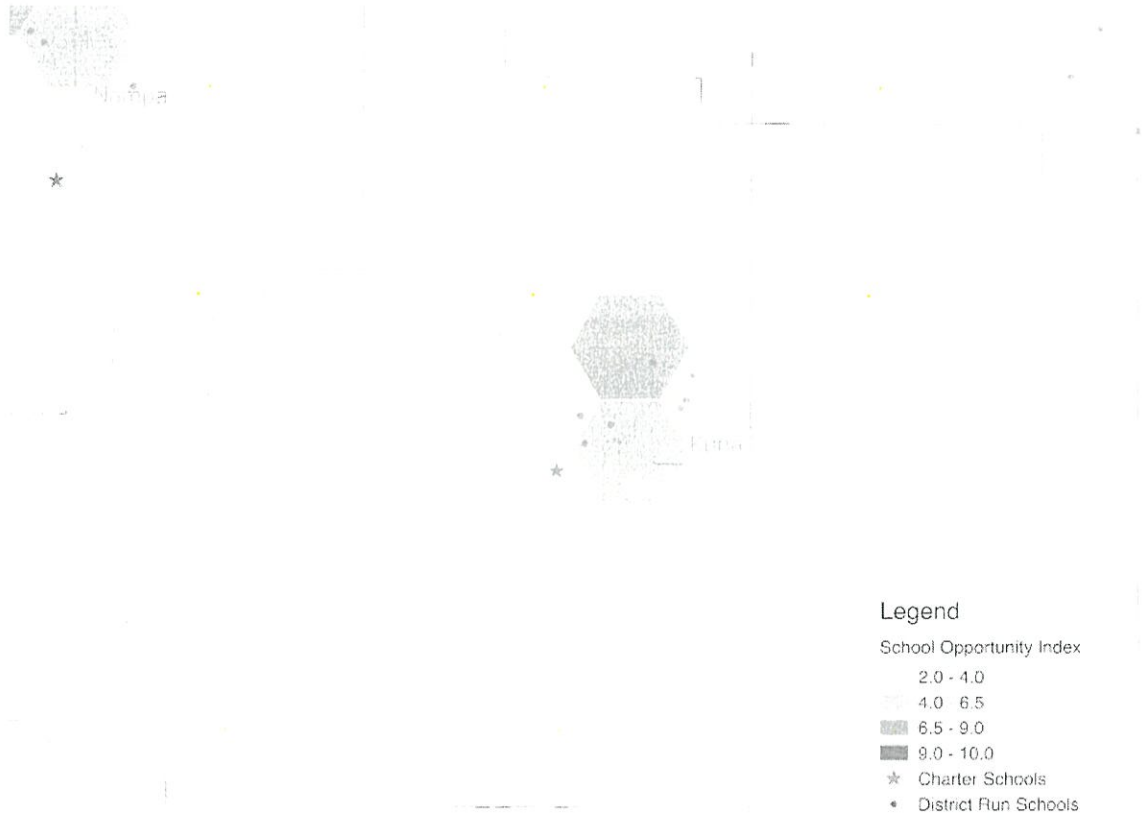
Source: ECONorthwest

Kuna

The strongest opportunities for new school services in the Kuna vicinity are within central Kuna and north along S. Meridian Rd. These opportunities (see **Figure 20**) are associated with the following:

- Concentrations of existing school-age population in central Kuna and along S. Meridian Rd. towards the neighborhoods south of Meridian and Boise.
- Expected growth in school-age population primarily north of Kuna and along S. Meridian Rd.
- A concentration of permitted housing units to the north of central Kuna.
- Concentrations of people living in poverty in central Kuna.
- Concentrations of Non-White populations in central Kuna.
- Concentrations of Hispanic populations in central Kuna.
- Students enrolled in underperforming schools in Kuna in both 2013 and 2015.

Figure 20. School Opportunity Index: Kuna



Source: ECONorthwest

6. Conclusion

This report examined a number of factors important to the question of where new school opportunities exist within the Treasure Valley. These factors included measures relating to 1) the current location of populations that are the target of new choice school options, 2) the locations of expected growth in school-age populations, and 3) the location of school-age populations that are currently underserved by existing school programs. Any one of these factors, on their own, could be a justification for the siting of new school programs. This report made progress toward the development of a combined measure of the relative importance of school siting locations, or a School Opportunity Index.

By this measure the most promising locations for the siting of new school services are throughout much of the city of Boise; in the city of Meridian between I-84 and U.S. 26, south along SR 69 and north to Star; and within the cities of Nampa, Caldwell and Kuna. Unsurprisingly, new school opportunities are greatest in existing population centers, and also reflect expectations for where growth in school-age population will be greatest over the next few years.

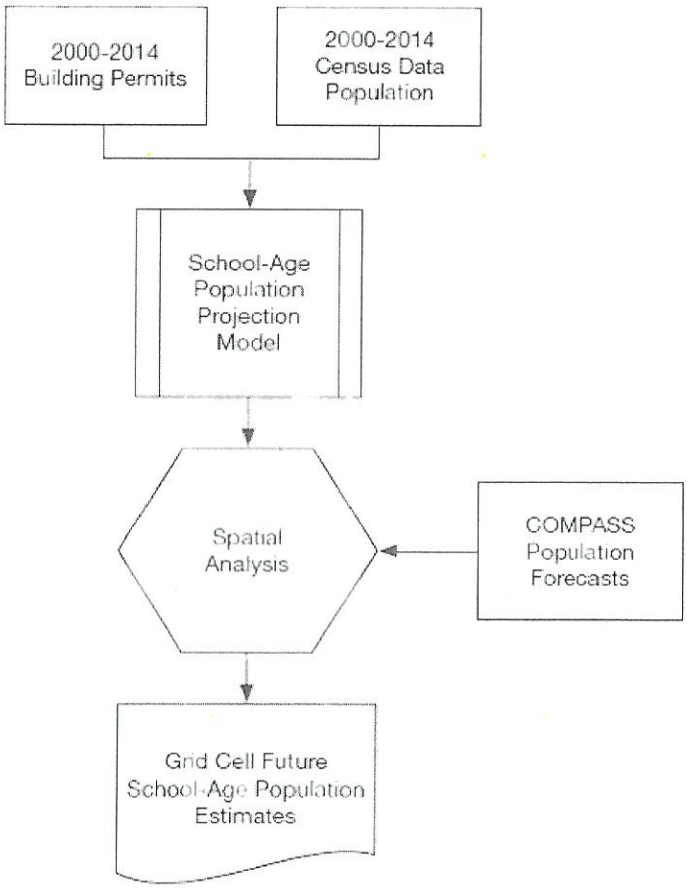
The School Opportunity Index is not a substitute for a deeper understanding of local market conditions. It should be used only as a guide within a more detailed examination of local factors and student needs in support of decisions about where to locate new school programs. This report does highlight the need for new school options in the Treasure Valley. The school-age population in the Valley is expected to grow by around 3,400 by 2020 and an additional 5,000 by 2025. And the number of existing students served by school programs that are underperforming relative to their peer schools across the state number in the thousands. An increasingly diverse population of students will lead to the need for a diverse set of programs to meet those needs. This report provides a starting point for the consideration of where new school programs might be located in the Treasure Valley.

APPENDIX: Modeling Methods

School-Age Population Projection Methods

This study has developed Treasure Valley projections of school-age population at a 1-mile grid cell geography. A previous project, *Shifting Sands: Idaho's Changing Student Demographics and What it Means for Education*, made use of census tract level population projections made available by the Nielson Company. The Nielson projection methods start with estimates of "base counts," such as total population, household population, group quarters population, households, family households, and housing units. Characteristics related to these base counts are then estimated. Population characteristics include age, sex, race, and Hispanic ethnicity; households are estimated by age of householder and income; family households are estimated by income; and owner-occupied housing units are estimated by value. The Nielson cohort survival method is executed first at county level, then for tracts, and finally block groups, with each set of estimates controlled to the results at the next higher geographic level.

Figure 21. School-Age Population Projection Model



These projections had two important limitations with respect to what was useful to this study of school opportunities. First, population projections for 2019 represent only a very small time increment. Second, census tract geography is too large to allow for the development of insights relevant to the school service siting problem. The methods employed in this study differ considerably. A simple block-group model of school-age population was estimated from U.S. Census and ACS data.

The model predicts school-age population in the current time period as a function of the school-age population and the under-5 population in the previous time period, as well as the change in total population and permitted housing units between the previous and current time periods. A second model predicts the under-5 population in the current time period as a function of the under-5 population in the previous period, total population in the previous period and the change in total population between the previous and current time periods. Both models fit the data well. The school-age model has an r-squared of .98, explaining 98 percent of the variability in current year school-age population across the census block groups. The under-5 model has an r-squared of .96.

The use of these simple models in the production of school-age population projections involves a number of additional steps. Future estimates of total population at a small geography are supplied by population forecasts developed by the regional Metropolitan Planning Organization (COMPASS)[6]. These population forecasts include 5-year estimates of population at a Transportation Analysis Zone (TAZ) geography through 2040. These forecasts of total population are needed to estimate growth in school-age population. To operationalize the model in the population projection process all data elements are converted into the 1-mile grid cell geography. The results are grid cell level projections for under-5 population and school-age population for 2020. These results are then used to develop projections for 2025 as well. The process is displayed in **Figure 21**.

The number of permitted housing units (between the previous and current period) was included in our school-age population model, but was a weak predictor of school-age population given the inclusion of a measure of total population change. There is also no reasonable means of developing a future estimate of permitted units and so this variable is dropped when projecting future school-age population. The permit data collated by COMPASS from individual jurisdictions informs the COMPASS demographic forecasts, and in this manner influence the results.

The school-age population projection methods employed for this study have advantages and disadvantages. They are simple to implement and understand, and they perform well in terms of estimation from historical data. As aggregate models when used to project out future populations they are sensitive to small changes in the estimated parameters, or model error. The future estimates are also intimately linked to the total population forecast that "drive" the projections, in this case these are the COMPASS forecast products. The current methods allow for the representation of the projected population at a small geography (1-mile grid cell) and the total projected school-age population for the Treasure Valley compares reasonably with the projections produced by Nielson using their proprietary "top-down" approach.

Table 4. Historical and Projected School-Age Population

Source and Year	School-Age Pop
2000 Census	87,745
2010 Census	117,698
2014 ACS	121,907
2019 Nielson	**125,300**
2020 Current Method	**125,230**
2025 Current Method	130,520

Source: ECONorthwest, Nielson, U.S. Census

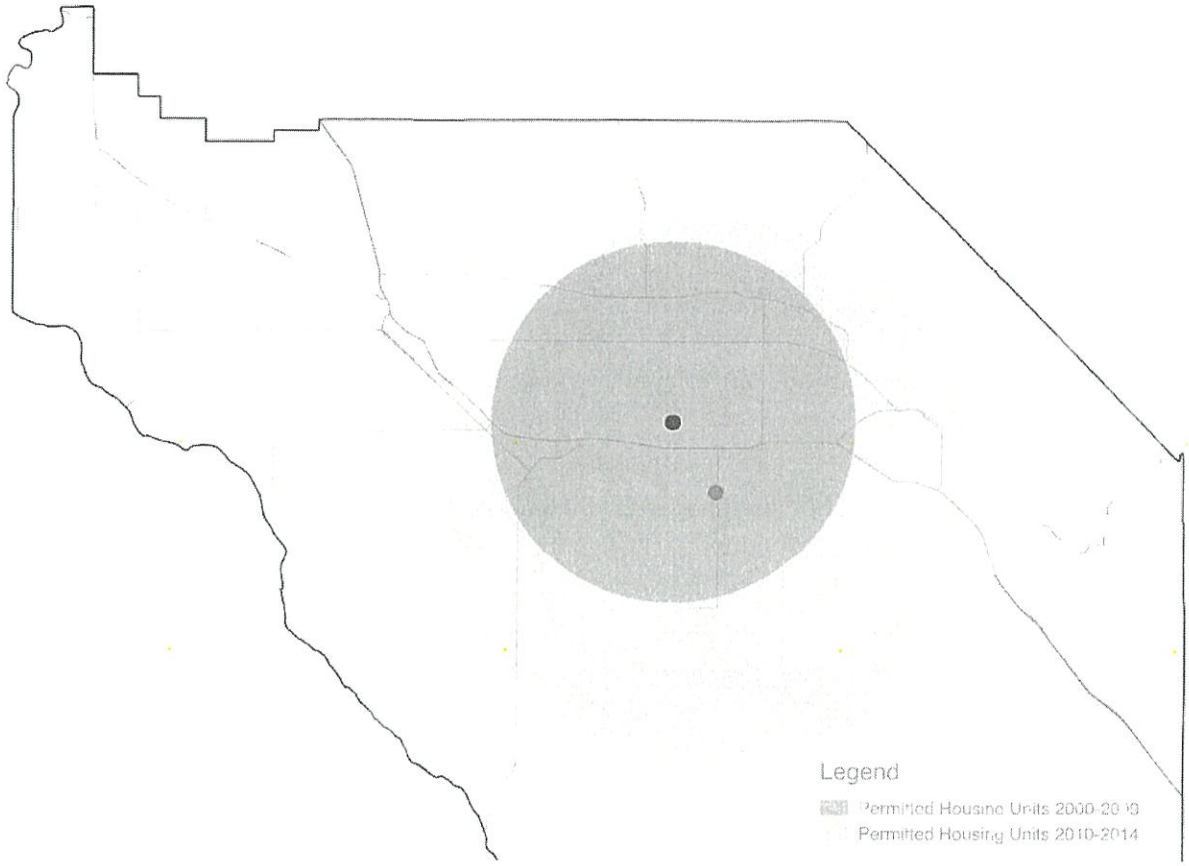
Building Permit Data

Within urban environments the construction of new housing units typically occurs at locations that are not necessarily where there are the densest concentrations of current residents. Land is often less expensive at the periphery of existing developments, especially in the case of land suitable to single-family detached housing. Multi-family housing units, on the other hand, will tend to concentrate in more densely populated areas (spreading land costs over multiple units) and along major transportation corridors. These trends are in part determined by land use policies but are also a function of the underlying economics of land markets. In trying to understand where new development may happen it is useful to look at data collected by permitting jurisdictions relating to permitting activities for residential units. COMPASS, the Metropolitan Planning Organization for the

[6] COMPASS. 2016. "Demographic Forecasts: Population, Housing, and Employment." Accessed May 10, 2016. http://www.compassidaho.org/prodserv/demo-forecasts.htm

Boise region, collects and assembles housing building permit data from individual jurisdictions. COMPASS uses this data in its own population forecasting process.

Figure 22. Mean Permitted Housing Unit-Weighted Distance to Center



Source: ECONorthwest, COMPASS and Jurisdications

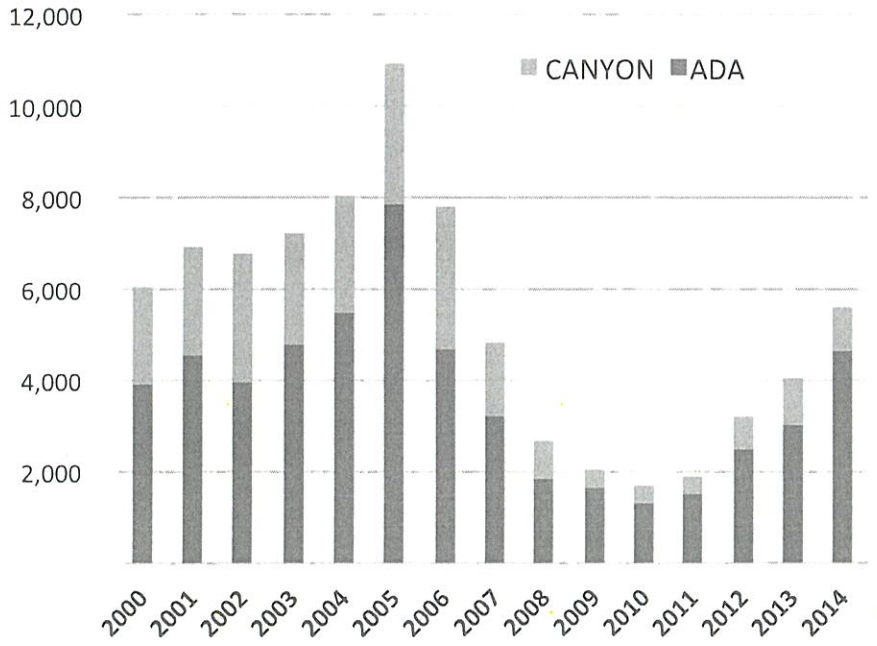
The issuance of a building permit does not necessarily lead the development of new housing units associated with that permit. The permit allows developers to proceed along the path of the development process, but that process may be abandoned for any number of reasons. For example, a simple model that predicts (at the 1 mile grid geography) the change in housing units (as measured through the U.S. Census and American Community Survey) as a function of the number of permitted housing units in previous years suggests that somewhere in the range of 70 percent of permitted units result in new housing units. This result held true in the period leading up to the 2010 census. Post 2010 the model is a weaker predictor and the pattern in less clear.

Examining permitted housing units pre- and post-2010 also shows some differences in the location of new permitted units. **Figure 22** depicts the housing unit-weighted mean (centered) locations and buffers depicting the housing unit-weighted mean distance from the center for units permitted pre-2010 and post-2010. Units permitted pre-2010 were on average more centrally clustered (8.2 miles) around the center point of development than was the case for units permitted post-2010 (12.4 miles).

The number of permitted housing units in the region averaged over 6,000 per year leading up to the mortgage crisis in 2007. After the housing market collapse new permitted units declined dramatically (see **Figure 23**). Permitted units in Canyon County in 2011 were just 10 percent of the number of permitted units in 2006 just

prior to the recession. The economic recovery has resulted in a steady increase in the number of permitted units once again in the greater Boise area. In 2014 the number of permitted units reached over 5,500, approaching the volume of permit activity experience in the pre-recession period.

Figure 23. Permitted Housing Units in Ada and Canyon Counties 2000-2014



Source: COMPASS and Jurisdictions

School Performance Model Methods

The identification of the number of students enrolled in underperforming schools begins with the development of a statewide model of school performance. The model estimates school performance as a function of school-level characteristics, predominantly characteristics of the student population being served. The model attempts to answer the following question: What is the expected performance of any school given the characteristics of the school population? The model is a linear regression model estimated using data on all schools in Idaho. The dependent variable is a measure of the share of students at the school-level meeting proficiency in the statewide Math assessment. The explanatory variables include shares of students who are white, black, Hispanic, Asian/Pacific Islander, eligible for FRL, are designated as receiving Special Education services, are English language learners, the total enrollment in the school, and dummy variables indicating if the school is a middle or high school. The method is similar to the methods employed in the Center on Reinventing Public Education's (CRPE) report *Measuring Up*.[7] Math assessments were selected for this study for two reasons. First, performance on math assessments is likely influenced by reading proficiency, but performance on reading

[7] DeArmond, Michael, Patrick Denice, Betheny Gross, Jose Hernandez, and Ashley Jochim. 2015. "Measuring Up: Educational Improvement and Opportunity in 50 Cities." Center for Reinventing Public Education. Accessed May 10, 2016. http://www.crpe.org/sites/default/files/measuringup_10.2015_0.pdf

assessments are less influenced by math proficiency[8]. Second, math proficiency is strongly linked with future earning potential[9].

The model produces estimates of expected shares of students meeting proficiency standards in math, along with standard errors around these estimates. Actual school-level performance can be then be compared with the model predictions. Where actual school performance is sufficiently different than predicted performance (taking into account the prediction's standard errors), schools can be characterized as underperforming, performing as expected, or performing above expected levels.

School-level models were estimated based on data from 2013 statewide assessments (ISAT) and from 2015 assessments. Between 2013 and 2015 Idaho adopted a new assessments based on the Smarter Balanced Assessment Consortium and designed to support Common Core curriculum. Tests were administered in 2014 as well but the Idaho State Department of Education (SDE) does not release these results as 2014 was considered a "test" of the test during the transition to the new assessment program. This transition in assessment also means that analysis of 2013 and 2015 school performance based on these testing data are independent and may not be comparable.

$$Y = \beta_0 + \beta_1(White)_j + \beta_2(Black)_j + \beta_3(Asian)_j + \beta_4(Hisp)_j + \beta_5(FRL)_j + \beta_6(ELL)_j + \beta_7(Size)_j + \beta_8(Size^2)_j + \beta_9(Mid)_j + \beta_{10}(High)_j + \epsilon$$

School Performance Model	2013
R	0.743
R-square	0.552
Adjusted R-square	0.544
N	637

	Coefficient	*Standard Error*	*t Stat*	*p-level*
Intercept	69.08343	6.0148	11.48558	0.
White	0.28745	0.05755	4.99477	7.65345E-7
Black	-1.19659	0.31861	-3.75568	0.00019
Asian	0.53753	0.25415	2.11502	0.03482
Hisp.	-0.05224	0.0677	-0.77161	0.44064
FRL	-0.11003	0.02935	-3.74875	0.00019
ELL	0.30527	0.08625	3.53938	0.00043
SpecEd	-0.68318	0.07974	-8.56705	0.
Size	0.02634	0.00418	6.2943	5.8146E-10
Size^2	-0.00002	3.22136E-6	-5.13266	3.81939E-7
HIGH	-22.57957	1.18178	-19.10638	0.
MID	-10.40493	1.103	-9.43328	0.

[8] Jordan, Nancy C., Laurie B. Hanich, and David Kaplan. 2003. "A Longitudinal Study of Mathematical Competencies in Children With Specific Mathematics Difficulties Versus Children With Comorbid Mathematics and Reading Difficulties." Child Development. 74: 834-850. http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2791887/

[9] Rose, Heather and Julian R. Betts. 2001. "Math Matters: The Link Between High School Curriculum, College Graduation, and Earnings." Public Policy Institute of California. Accessed May 10, 2016. http://www.ppic.org/content/pubs/report/R_701JBR.pdf

School Performance Model	2015
R	0.692
R-square	0.479
Adjusted R-square	0.468
N	552

	Coefficient	*Standard Error*	*t Stat*	*p-level*
Intercept	50.2178	6.66441	7.53522	0.
White	0.15927	0.06266	2.54185	0.01131
Black	0.0478	0.33577	0.14236	0.88685
Asian	0.9695	0.25989	3.73043	0.00021
Hisp.	0.05855	0.07642	0.7662	0.44389
FRL	-0.34024	0.03349	-10.15974	0.
ELL	-0.11101	0.0965	-1.15046	0.25047
SpecEd	-0.61505	0.12512	-4.91584	1.1745E-6
Size	0.00978	0.00472	2.07009	0.03892
Size^2	-5.63991E-6	3.35802E-6	-1.67954	0.09363
HIGH	-14.72552	1.39396	-10.56377	0.
MID	-8.95282	1.18483	-7.55619	0.

For each assessment year the difference between actual and expected performance is calculated for each school, and schools are then sorted into quintiles. For the purposes of this report the bottom performing quintile (20%) of schools are identified as significantly underperforming as compared with similar schools statewide. The school-age population located near each school is estimated as a function of distance to the school and other nearby schools.

BLUUM

LET GROW

1010 W JEFFERSON ST
SUITE 201
BOISE, ID 83702
BL M.ORG

COMMUNITIES OF EXCELLENCE

IDAHO'S CHARTER SCHOOLS PROGRAM GRANT

Idaho Charter School Growth Opportunities

June, 2019

ECONorthwest
ECONOMICS • FINANCE • PLANNING

Summary

- There are growth opportunities for high quality charter schools in various Idaho markets
- Contributions to charter growth will include:
  - Growth in school-age populations
  - Continued under-performance of existing schools
  - Untapped charter market potential

$0.00 (0%) of this research was funded by Federal CSP Grant dollars; $32,000.00 (100%) of this research funded by Bluum; total cost $32,000.00. The project, however, aligns with Bluum's commitments per the Communities of Excellence CSP project.

Study Purpose

- Use data to understand market opportunity for new charter schools in Idaho.
- Recognize that data needs to be "ground truthed" with local knowledge.
- Reflect ongoing efforts to open new high quality charter schools in greater Boise area
- Focus on a selection other potential markets
  - Pocatello
  - Twin Falls
  - Idaho Falls
  - Lewiston/Moscow

Related Work on Idaho Charter Markets

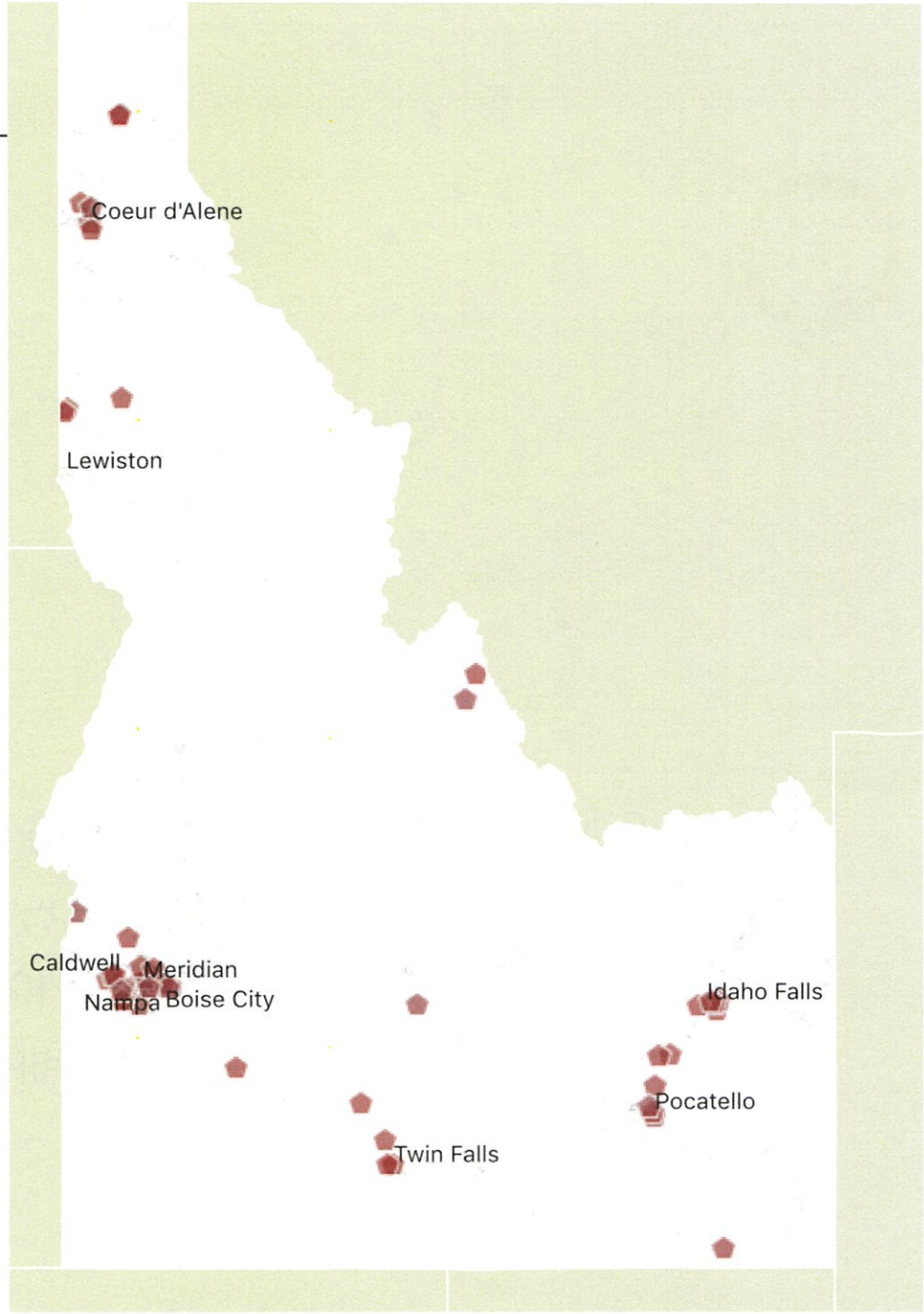
- Shifting Sands
  - Examination of changing demographics and potential demand for new charter school seats.
  - **Current work uses a similar school-age population projection method**
- Treasure in the Valley
  - Focused examination of charter school opportunities in the greater Boise region.
  - **Current work uses a similar method for identifying underperforming schools.**

Idaho Charter Schools

51 charter schools serving 19,500 students

6 virtual charter schools serving 4,500 students

Charter students are 8% of all Idaho public school enrollments



New Charter Seats in the Treasure Valley

Opening in August 2019

- Elevate Academy in Middleton
- Forge International School in Middleton
- Treasure Valley Classical Academy in Fruitland
- Compass in Meridian will open a new building adding 224 students

Key Indicators of Growth Opportunity

- Expected growth in school-age populations
- Presence of systematically underperforming schools (proficiency levels)
- Estimates of untapped charter market share

Expected Growth in School-age Population

K-8

- Boise/Nampa/Eagle
- Twin Falls
- Idaho Falls
- Pocatello
- Coeur d'Alene
- Mountain Home
- American Falls

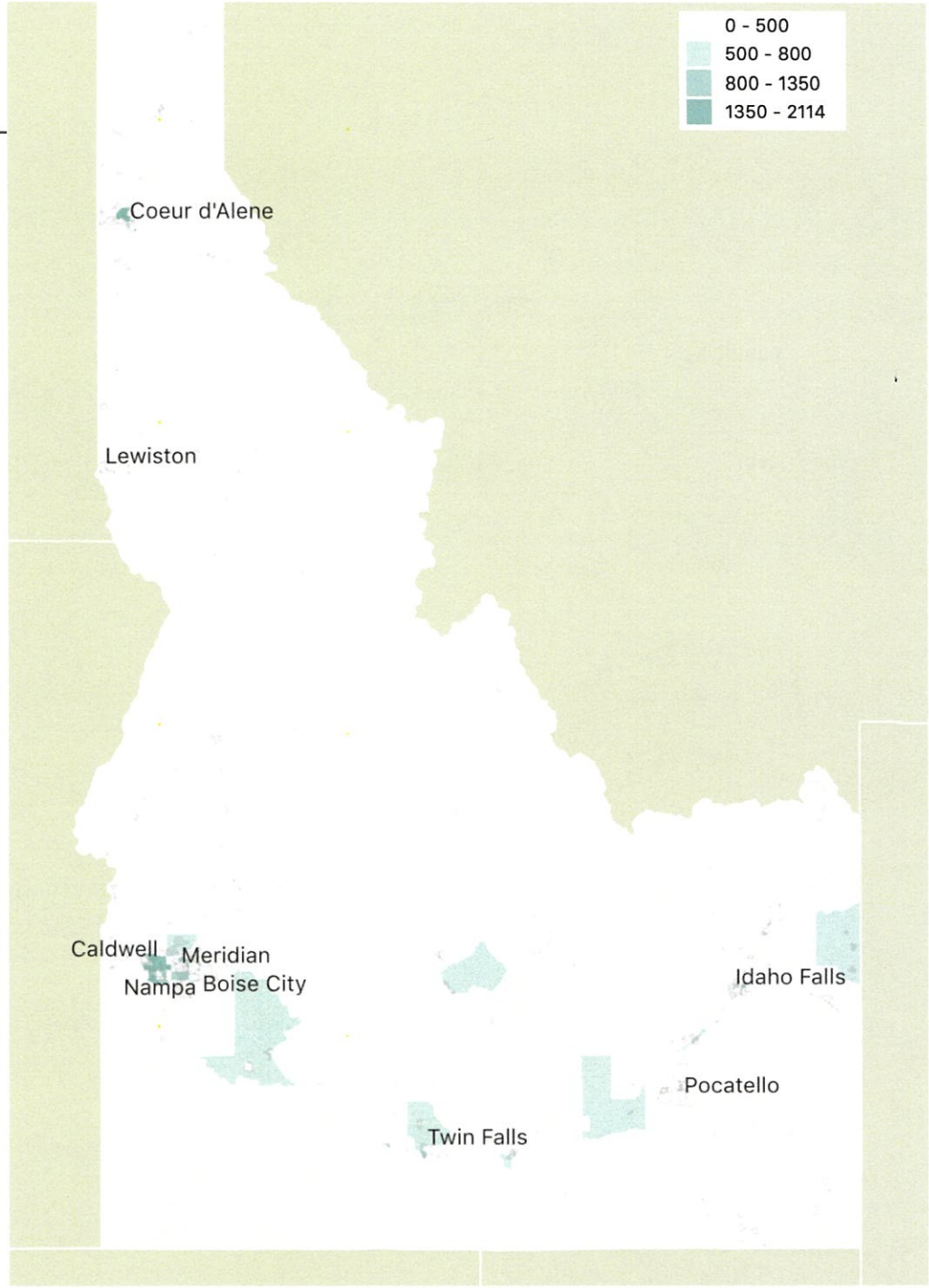
High School

- Boise/Nampa/Eagle
- Twin Falls
- Idaho Falls
- Pocatello
- Coeur d'Alene
- Moscow
- Fruitland

School-Age Population

Change in K-8 age student population by 2024

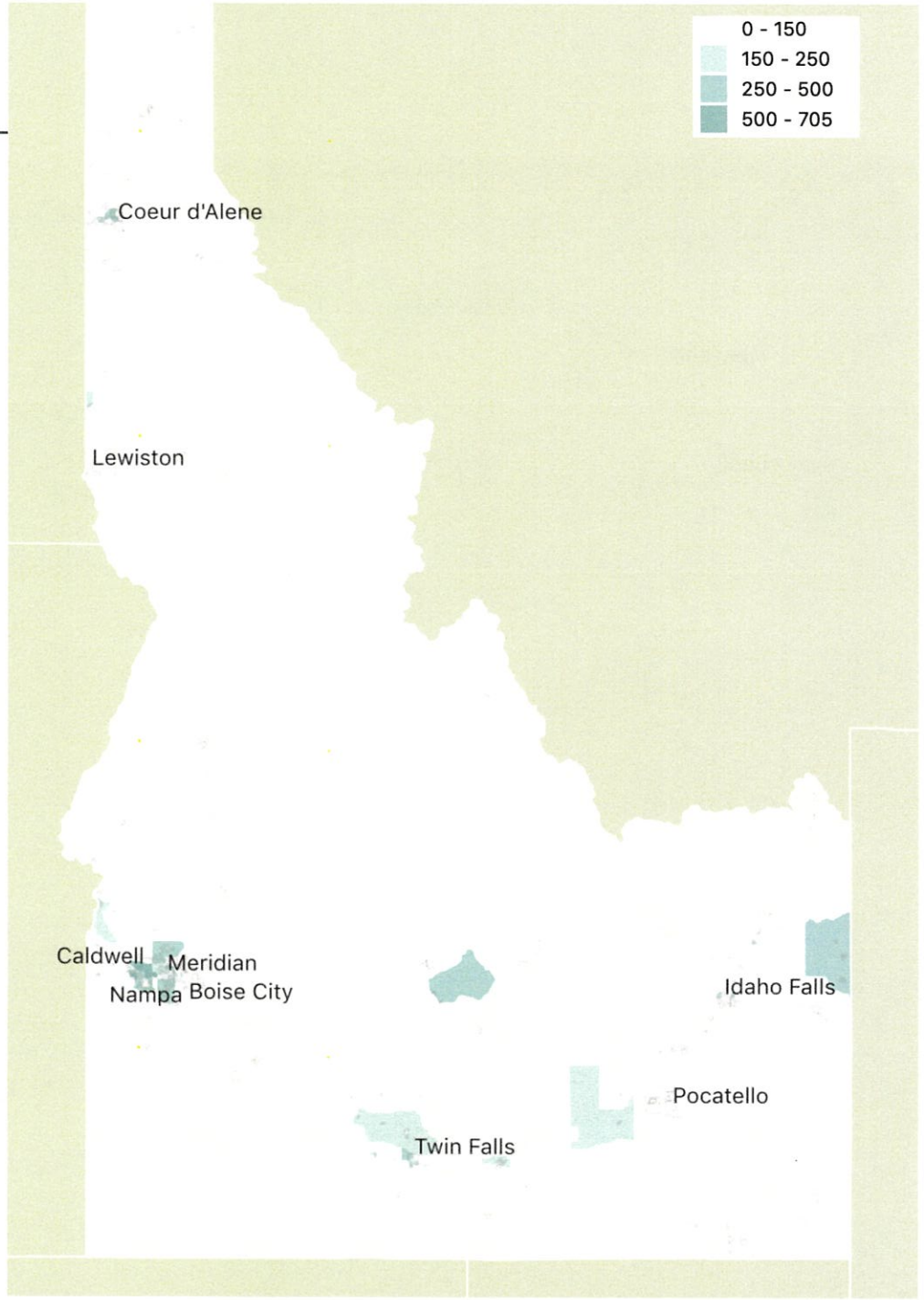
- 4,500 new white students
- 8,600 new non-white students
- 9,800 new Hispanic students



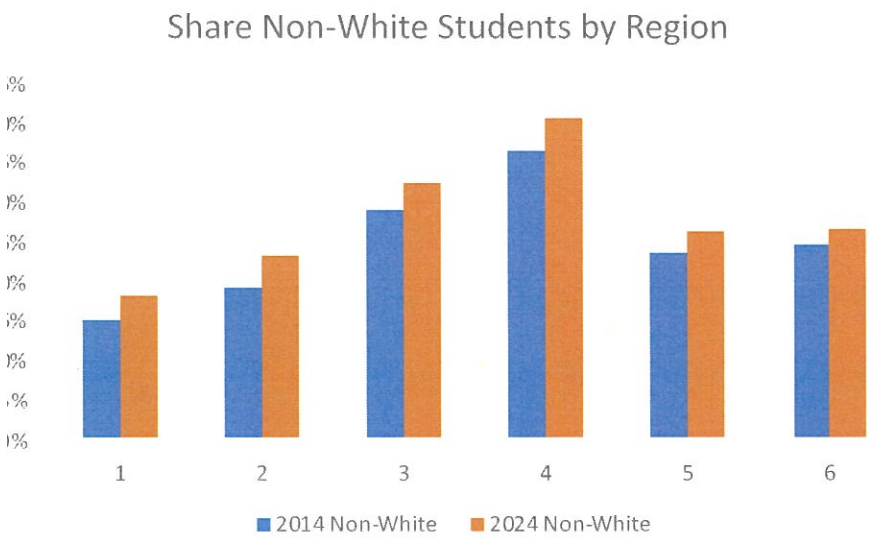
School-Age Population

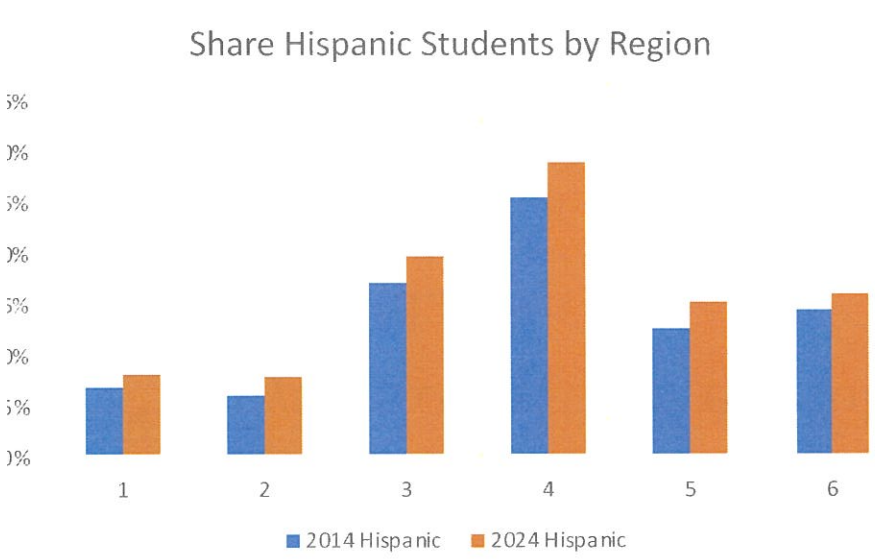
Change in High School age student population by 2024

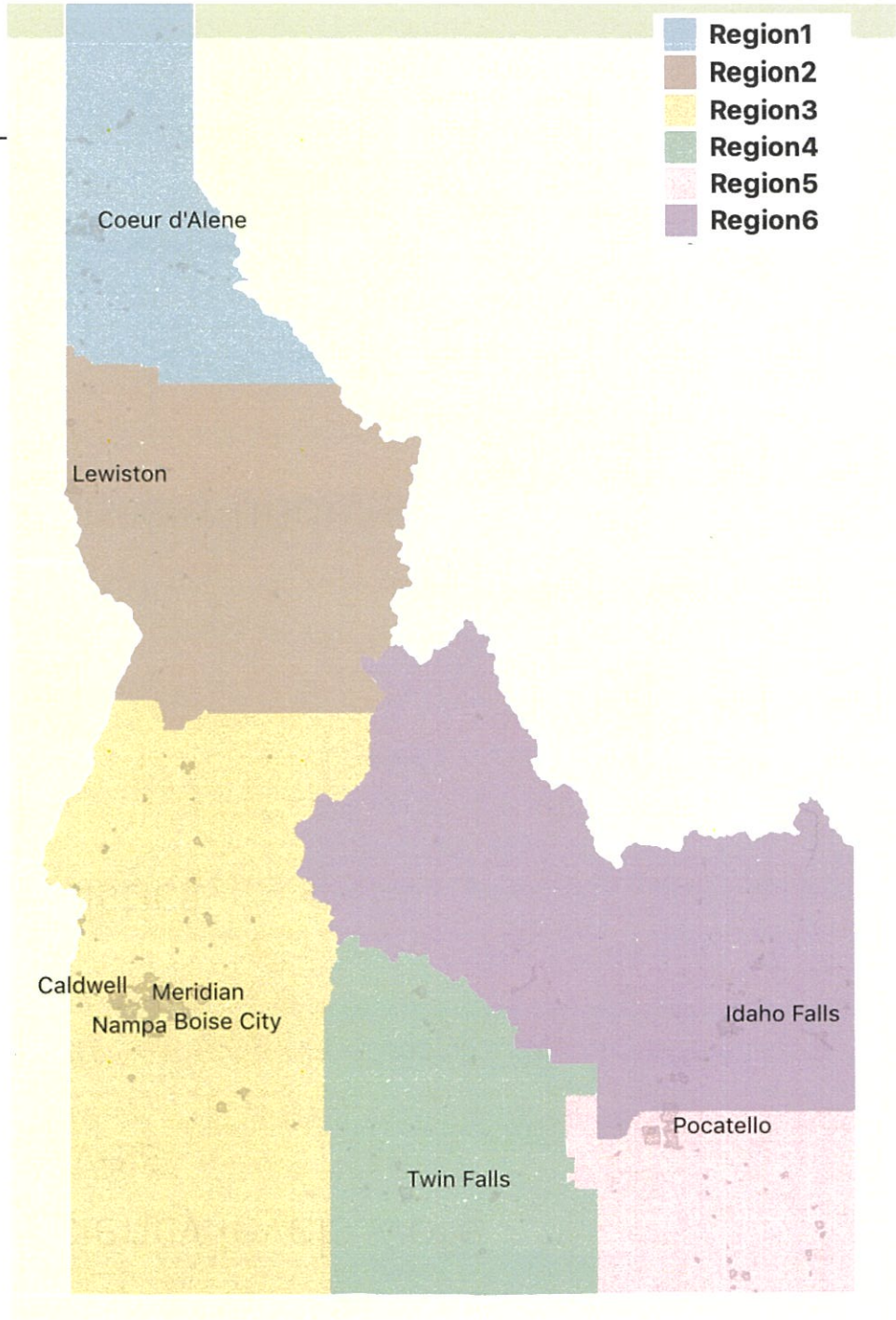
- 6,100 new white students
- 4,000 new non-white students
- 4,400 new Hispanic students



Changing Demographics







Modeling Underperforming Schools

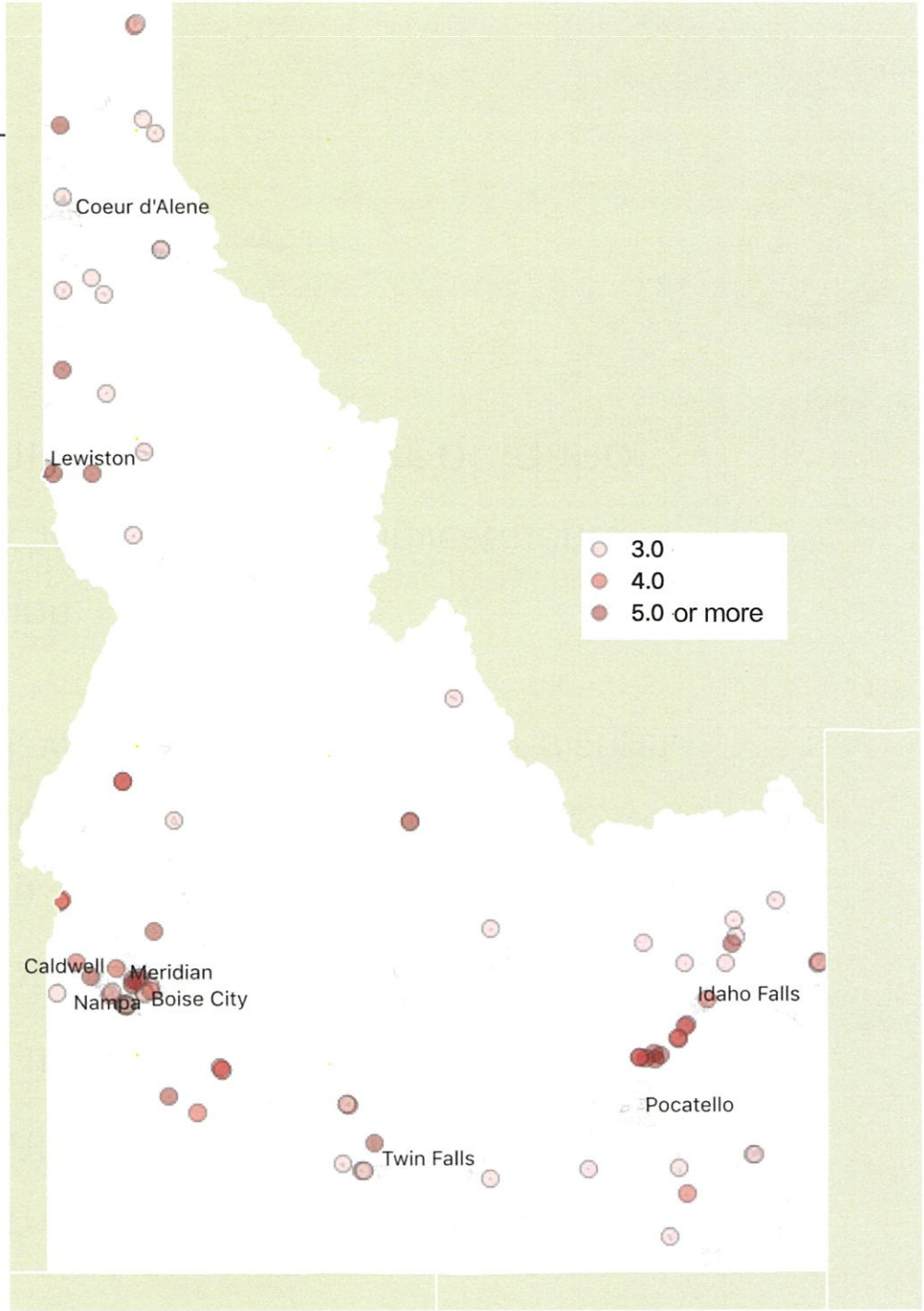
- Identified schools where proficiency levels were significantly below expected levels
- 3 years of test score results
- ELA and Math
- Controlled for school characteristics
  - demographics,
  - size,
  - school type,
  - free reduced lunch, special education
- A number of schools were persistent under-performers (2 or 3 years, both ELA and Math)

Underperforming Schools

ELA and Math results from 2014-2017

2 subject tests over 3 years = 6 test events

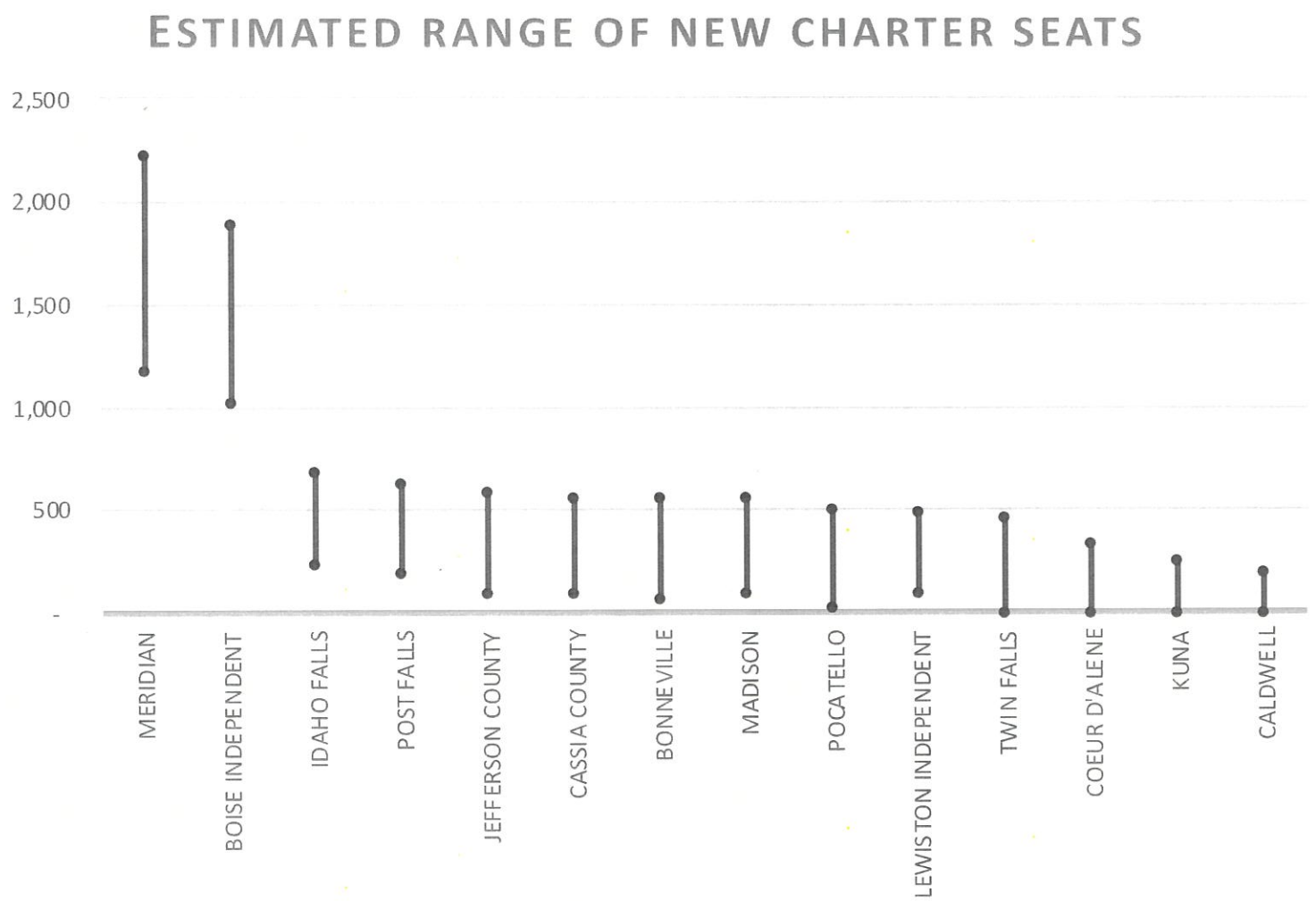
Schools that underperform consistently: 3 or more test events out of a total of 6.



Modeling Market Share

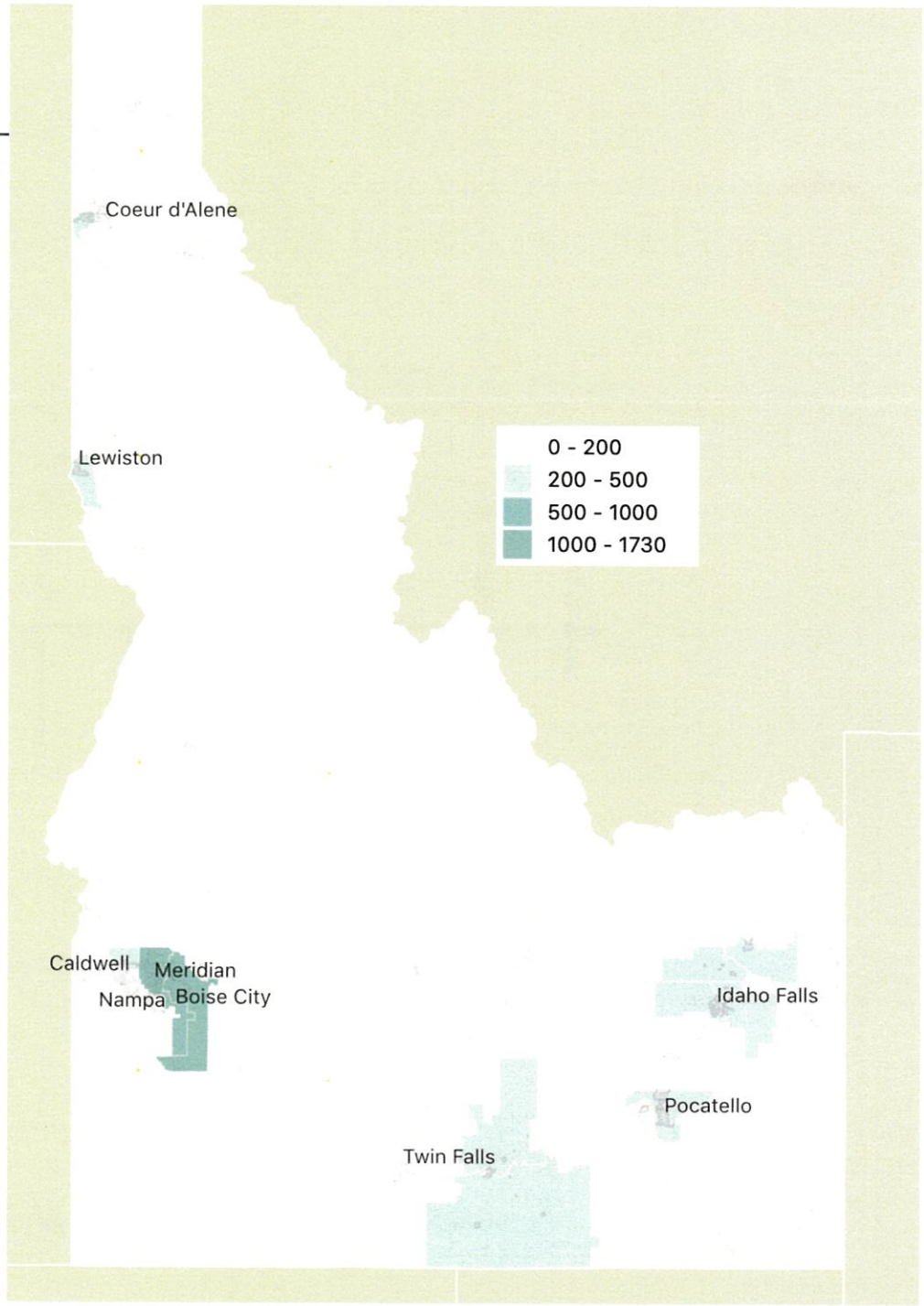
- Estimates of charter enrollment as a function of district characteristics, regional characteristics, and state policies.
- Used data from all districts in the U.S.
- Factors important to market opportunity:
  - district size, urban/rural area
  - district growth, regional growth
  - strength of unions, charter laws (caps on growth, non-district authorizers)
  - years since enabling legislation
  - per-pupil funding, charter school growth fund investments
- There are growth opportunities in a number of Idaho markets.

Idaho Market Growth Through 2024



Charter Market Share

Potential additional charter school seats through 2024.



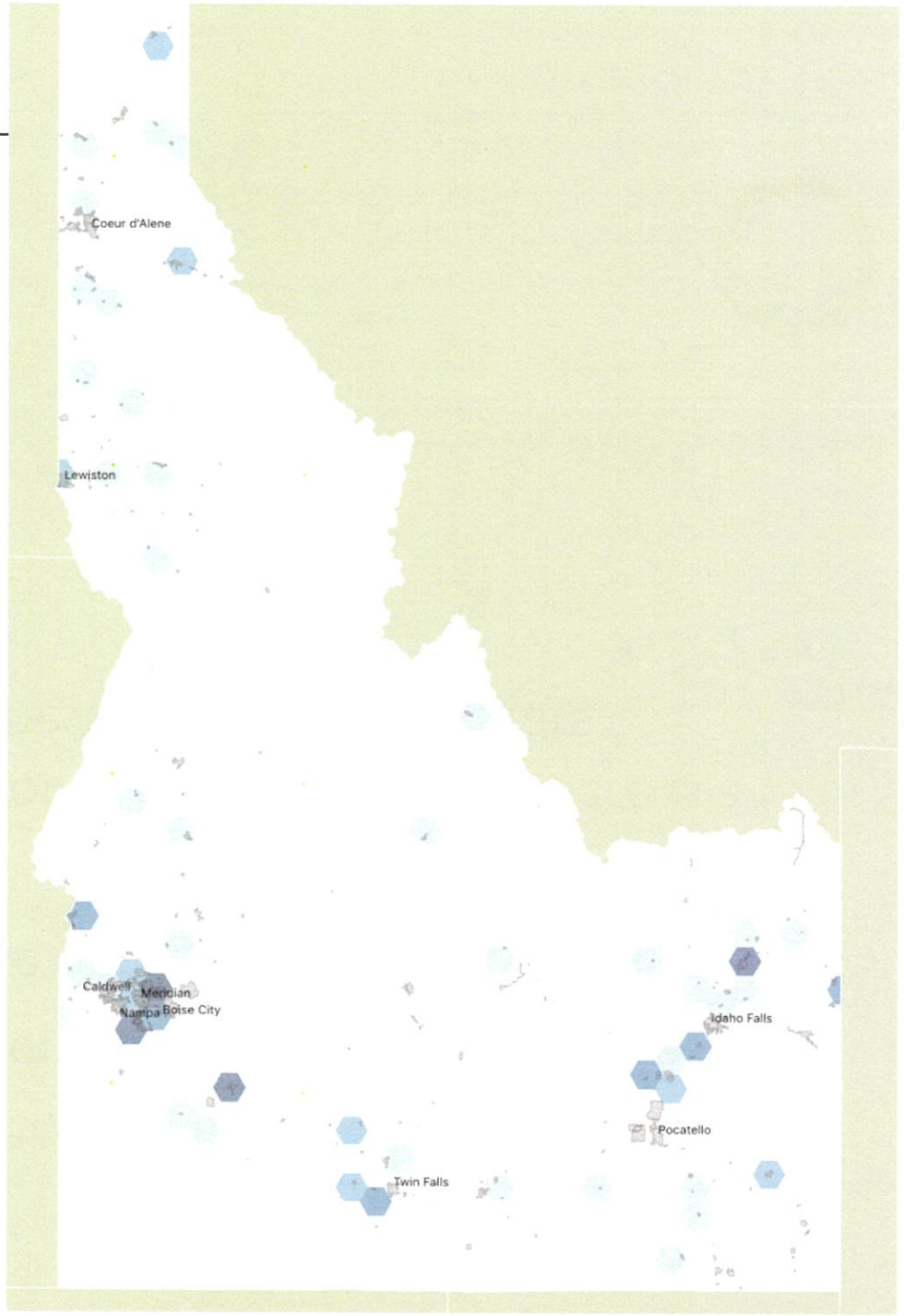
Opportunity Index

- Map factors onto grid cells
- Each grid cell is approximately 100 square miles
- Standardize the probability distribution of grid cell values
- Combine factors into a single opportunity index

- The index is a scaled indicator of locations where there is a strong case to be made for new charter school seats

Grid 1

Students enrolled in underperforming schools

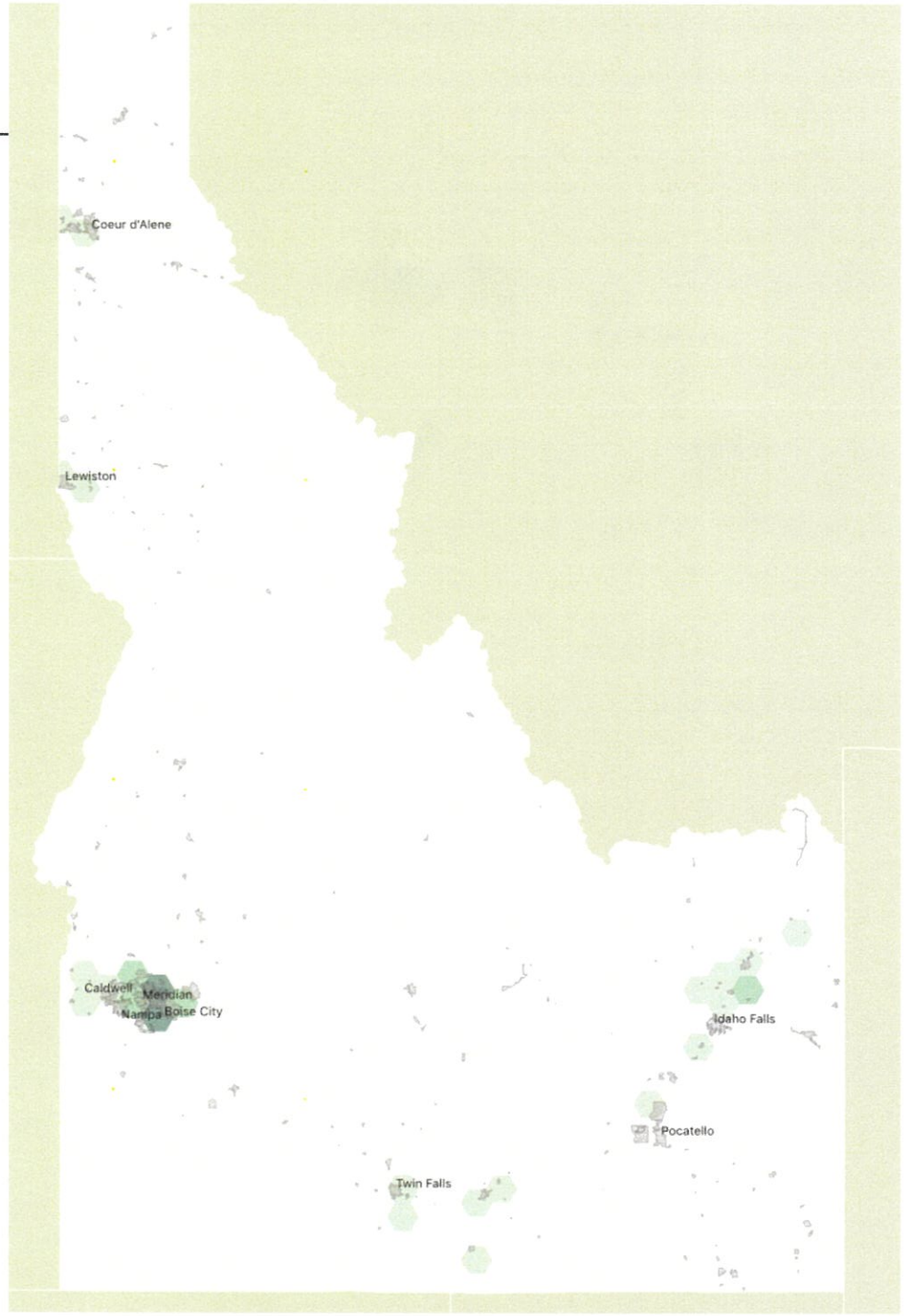


Grid 2

School-age population growth through 2024

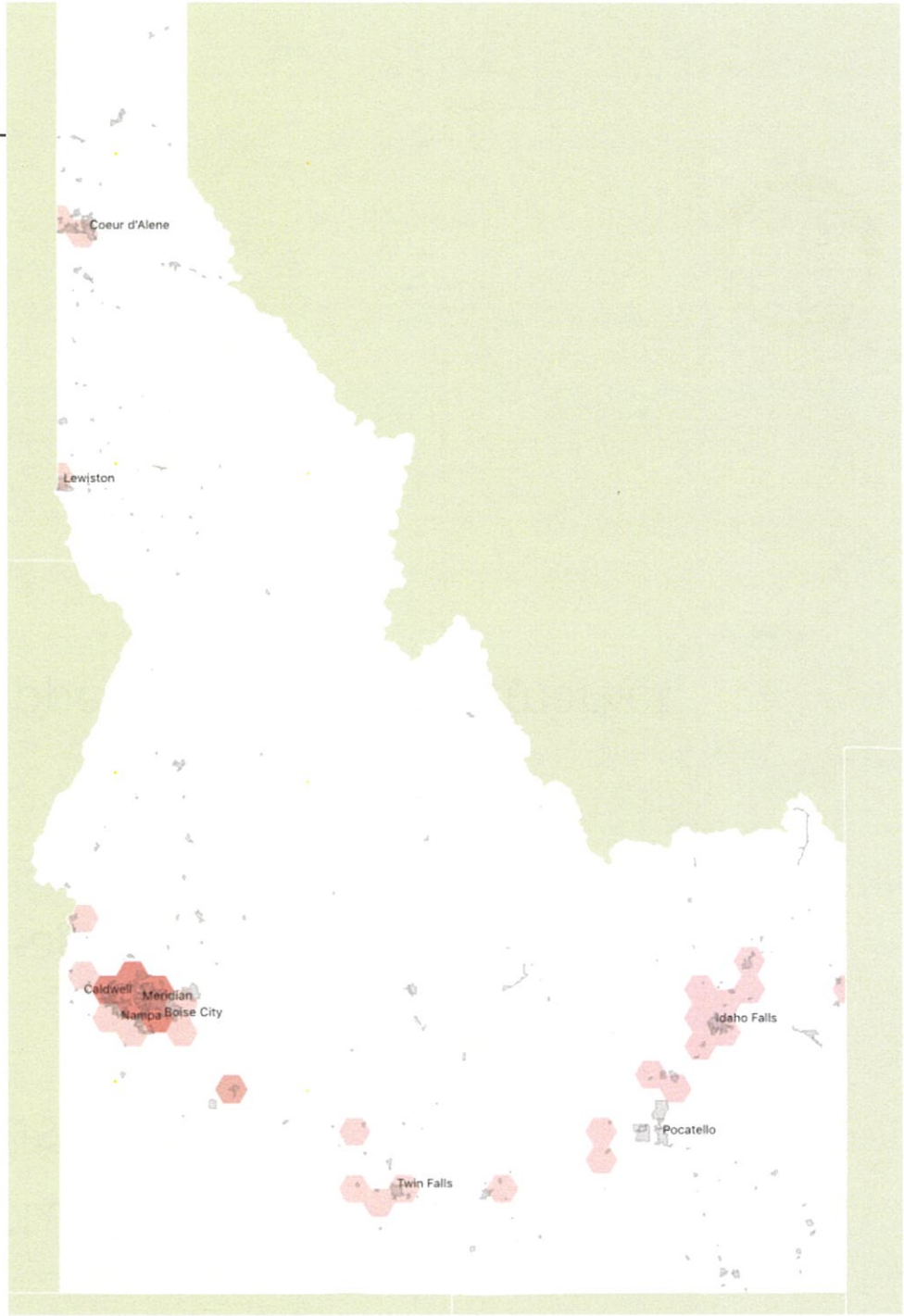
Grid 3

Charter market share growth potential



Opportunity Index

Composite measure of all previous factors



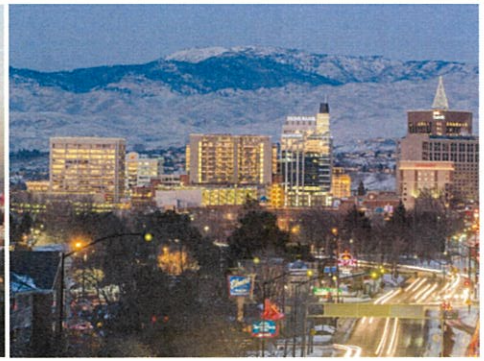
Conclusions

- There are growth opportunities for high quality charter schools in various Idaho markets
- Strong markets:
  - exhibit growth in school-age populations,
  - students are currently being served by under-performing schools,
  - reflect some as yet untapped charter school market potential

Portland

Eugene

Seattle


Boise

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Matthew Kitchen
Project Director
kitchen@econw.com

Appendix F9
Projected Facility Construction Costs

buildinghope

Invest Well. Do Good. Build Hope.

Introduction

April 2019

DETAIL -- PROJECT INFORMATION

Project Cost Adjustment	Compass Other Developer	Elevate BH Project	Gem Prep Nampa BH Project	Future PS BH Project	Forge BH Project
I. *Project Info*					
Sq. Ft.	68,092	53,000	40,040	39,603	39,000
Frame Type	Wood	Steel/CMU	Steel	Steel/CMU	Steel & Wood
Land	1,755,854	966,172	868,708	883,986	782,150
Site Work	1,510,871	905,115	810,393	367,245	1,184,997
FF&E	38,200	200,000	-	200,000	165,377
subtotal	**1,549,071**	**1,105,115**	**810,393**	**567,245**	**1,350,374**
Soft Costs	1,518,473	923,646	788,589	1,005,919	1,089,695
Construction	8,466,086	6,860,889	5,539,544	5,347,720	4,474,372
Miscellaneous - represents contingency	500,000	232,981	314,998	191,133	165,377
subtotal	**10,484,559**	**8,017,516**	**6,643,131**	**6,544,772**	**5,729,444**
Total Project Costs Excluding Land	**12,033,630**	**9,122,631**	**7,453,524**	**7,112,017**	**7,079,817**

II. *Soft Costs*					
Architecture	456,000	292,600	182,000	246,900	225,000
Engineering	409,410	194,900	190,000	148,950	175,000
Direct Project Costs	495,963	308,146	231,589	425,069	572,695
Development Fees	157,100	128,000	185,000	185,000	117,000
Total Soft Costs	**1,518,473**	**923,646**	**788,589**	**1,005,919**	**1,089,695**
cost per sq. ft.	**22.30**	**17.43**	**19.70**	**25.40**	**27.94**

Note 1: Cost per square foot is positively impacted by size of project by spreading costs over a larger denominator
Note 2: Both Future and Forge projects required significant impact or utilities fees

III. *Construction*					
Building Construction	7,460,594	6,355,701	5,132,956	4,967,737	4,143,619
Preconstruction and Construction Fees	825,691	435,650	356,601	325,733	330,753
Payment and Performance Bonds	179,801	69,538	49,987	54,250	-
Total Construction	**8,466,086**	**6,860,889**	**5,539,544**	**5,347,720**	**4,474,372**
plus contingency/projected and actual for completed projects	**500,000**	**232,981**	**314,998**	**191,133**	**165,377**
change orders to date	**254,780**	-	-	-	-
Projected Costs - Construction	**9,220,866**	**7,093,870**	**5,854,542**	**5,538,853**	**4,639,749**
cost per sq. ft.	**135.42**	**133.85**	**146.22**	**139.86**	**118.97**
impact of steel frame	**20.00**	-	-	-	-
cost per sq. ft. with steel frame comparison	**155.42**	**133.85**	**146.22**	**139.86**	**118.97**

Note 1: Constructing a wood framed building is less expensive than using a steel frame, industry estimates this price differences to be $20/sq ft.
There are significant long-term benefits to a strong structure with durability and maintenance
Note 2: Both Elevate and Forge projects included the construction of two separate structures, thereby having a negative impact by increasing the cost per sq. ft.

IV. *Cost per Sq. Ft. - Soft Costs and Construction*					
as is	**157.72**	**151.27**	**165.91**	**165.26**	**146.91**
with steel frame comparison	**177.72**	**151.27**	**165.91**	**165.26**	**146.91**

V. *Fee Analysis*	Compass	Elevate	Gem Prep Nampa	Future PS	Forge
Sub Total Before Finanacing and w/o Land	**12,033,630**	**9,122,631**	**7,453,524**	**7,112,017**	**7,079,817**
Less: Developer Fees	(157,100)	(128,000)	(185,000)	(185,000)	(117,000)
Less: Preconstruction and Construction Fees	(825,691)	(435,650)	(356,601)	(325,733)	(330,753)
Project Cost excluding Land, Financing, and Fees	11,050,839	8,558,981	6,911,923	6,601,284	6,632,064
Total Fees	982,791	563,650	541,601	510,733	447,753
Fees as % of Project Costs	**8.9%**	**6.6%**	**7.8%**	**7.7%**	**6.8%**

Expansion

Year	School	School Category	Type	Total Project Financing	JKAF	Sr. Debt	Lender	Rate	Amortization	LTV	Type
2014	Vision	Expansion	New	7,000,000							
					500,000	6,500,000	Bank Traditional	3.50%	25 YR	93%	Bank Bond TE
2015	Sage International	Expansion	Renovation	12,300,000	4,500,000	7,800,000	Bank Bonds	3.23%	25 YR	63%	Bank Bond TE
								3.37%		78%	
New Construction											
2016	Alturas International Academy	Start-up	Renovation	7,200,000	2,335,000	4,865,000	Bank Traditional	5.25%	25 YR	68%	Const/Mini Perm
2017	Future Public School	Start-up	New	9,291,465	1,870,000	7,421,465	Bonds	5.60%	30 YR	80%	TE Bond
2017	Gem Prep Nampa	Expansion	New	9,511,182	1,950,000	7,561,182	Bonds	5.60%	30 YR	79%	TE Bond
2017	Gem Prep Meridian	Replication	Renovation	5,553,288	1,380,000	4,173,288	Bonds	5.60%	30 YR	75%	TE Bond
2018	Elevate Academy *	Start-up	New	11,987,649	2,500,000	9,487,649	Bank Traditional	6.75%	30 YR	79%	TE Bond
2018	Treasure Valley Classical Academy *	Start-up	Renovation	4,200,000	1,260,000	2,940,000	Bank	4.92%	25 YR		Const/Mini Perm
2018	Gem Prep Pocatello *	Expansion	Renovation	6,600,000	2,000,000	4,600,000	Bank Traditional	5.30%	25 YR	70%	Const/Mini Perm
2018	Sage Middleton * (Forge)	Replication	New	8,049,851	2,550,000	5,499,851	Bank	5.30%	25 YR	68%	Const/Mini Perm

Appendix F10
Pending-Program Planning and Design Package

E 42ND ST.
VISITOR PARKING
GARDEN
FIRE ACCESS
STAFF PARKING
RELOCATED PAVILION
PLAY
FIRE ACCESS

Appendix F11
Job Descriptions

Anser Charter School

AN EXPEDITIONARY LEARNING SCHOOL

Education Director/Principal
JOB DESCRIPTION

The new Education Director/Principal will work collaboratively with the current Education Director/Principal for the 2014-2015 school year. Fall of 2015 the new Education Director/Principal will be responsible for all duties described by this position.

General Description: The Education Director/Principal, who operates under the direction of the Board of Directors and in accordance with state education statutes, works in tandem with the Organization Director to ensure the successful operation of ANSER Charter School. The Education Director/Principal is responsible for overseeing the instructional program within the school and the implementation of Expeditionary Learning practices and curriculum aligned to the Idaho Core Standards. The Education Director/Principal must see individual student success (academic, social, emotional and ethical) as paramount and should guide the collaborative work with teachers. The Education Director/Principal directly supervises instructional staff and has significant responsibilities for the evaluation, management and professional development of staff. The Education Director/Principal shares the voice and face of the school with the Organization Director and is ultimately accountable to make sure parent and staff concerns regarding the educational program are given time and commitment.

It is expected that the Education and Organization Directors, working as a team, will consult and coordinate closely concerning all listed responsibilities and that accountability for specific duties may shift between the two directors according to interest and competencies. Any changes will be recommended to the Board of Directors for review and adoption.

Curriculum and Programs:

- Ensure that all educational programs are aligned with Anser's mission, vision and charter.
- Ensure that Anser Charter School teachers understand and fully implement Expeditionary Learning instructional strategies and practices aligned to the Idaho Common Core State Standards.
- Model and encourage research, reflection and revision in order to ensure program improvement and superior program quality.
- Facilitate professional development opportunities for instructional staff.
- Develop and implement academic and support systems as needed.

Instruction:

- Ensure that instruction is effective and meets the needs of diverse learners. Ensure teachers employ techniques of active pedagogy described in Expeditionary Learning benchmarks and the Idaho Common Core State Standards. Observe in classrooms and provide feedback as necessary. Set up instructional improvement plans if needed.
- Propose school-wide instructional goals based on data and feedback. Additionally support teachers in setting personal and school-wide goals.
- Ensure equity in instructional delivery. Promote school-wide belief that all students can and will learn and achieve at high levels.
- Develop instructional schedules that ensure collaborative planning time for crew level teachers. Ensure schedules support instructional and curricular goals.
- Lead Instructional Leadership Team. Select teachers to participate and coordinate schedules and agendas.
- Support Anser Charter School in moving forward with technology use. Support teachers with technology integration by providing resources, professional development opportunities and suggestions; all in coordination with the Organization Director.

Discipline/Social Curriculum:

- Monitor and support the use of Anser's school wide code of conduct.
- Oversee disciplinary interventions, delegating appropriate action and responsibilities;
- Support teachers and other staff in implementing discipline policy and procedures.
- Foster student leadership, service and stewardship.
- Implement all policies related to student behavior.

Assessment and Accountability:

- Ensure that teachers assess student learning using formative, self-assessment and summative data. Support teachers in using long-term and supporting learning targets as an effective assessment strategy.
- Ensure that teachers communicate student achievement on a consistent basis to parents through conferences and Student Achievement Reports.
- Ensure each student has a Showcase Portfolio and each Crew Level or content teacher has an Exemplary Portfolio.
- Collaborate with teachers on the collection of school accountability data. Provide support as needed. Ensure that data is organized and stored at the school for compliance reviews and audits.
- In collaboration with the Education Committee, conduct annual parent survey requesting feedback on school culture, teacher competency, communication, etc.

Professional Development:

- Work with the Instructional Leadership Team to create a yearlong professional development calendar that aligns to the work plan, the Idaho Common Core Standards and the mission and vision of the school.
- Propose budget for professional development activities in accordance with the budget cycle. Ensure alignment with goals.
- Provide all staff members with opportunities for outside professional development. Seek to connect staff with professional development in line with personal/professional goals. Review professional development requests. Disseminate information about outside professional development.

Personnel/Human Resources

- Oversee selection, development, supervision, evaluation and termination of instructional staff including specials teachers and student safety staff.
- Assemble interview teams for available positions. Provide interview training as needed for teams. Involve teams in developing criteria and questions (see Hiring Protocol).
- Review and actively participate in the review and update of the school handbook, personnel policies and other documents deemed necessary.
- Oversee timely administration of all required state and federal educational mandates and testing; monitor and adhere to state education statutes.
- Evaluate educational programs providing an opportunity for student and parent input.
- Develop and Implement School Policies (In conjunction with Education Committee to the Board and Family Council):
- Submit required reports to appropriate entities in a timely manner.

Family Involvement:

- Communicate regularly with families through the Anser Flight Plan and News from the Nest. In coordination with the Organization Director, supervise dissemination of materials to families.
- Ensure teachers hold Goal Setting Conferences (1x/year) and Student Led Conferences (2x/year) and support teachers in obtaining 100% attendance. Arrange and attend conferences when needed or requested.

- Ensure Student Achievement Reports align to the Idaho Common Core Standards, are standards based and they are written in respectful and specific language.
- Work in collaboration with the Organization Director and Family Council to engage families both in the educational process as well as connecting families with each other.
- Work in tandem with the Organization Director to schedule and hold Open Houses and visitations for prospective families and orientation opportunities for new families.
- Hear and respond to parent concerns related to their children, instruction and other school matters, keeping in mind the first place a parent should go if there is a concern with the child's teacher is to the teacher.

Budget and Finance:

- Approve all staff requisitions regarding education supplies and materials; oversee line items specific to education program;
- Collaborate with the Organization Director on program and budget requirements.

Corporate Participation:

- Serve as a non-voting, ex-officio member of the Board and Executive Committee.
- Assist Board and Organization Director in developing, updating and implementing ANSER's strategic plan.
- Assist Board and Organization Director to monitor, revise, renew and adhere to ANSER's charter.
- Collaborate in organizational goal setting and monitoring.
- Prepare correspondence and reports as needed.
- Carry out special assignments as directed by the Board/Executive Committee.
- Attend and participate in committee meetings and relevant organizations (local, regional and national) at the request of the Board.

Community Relations Participation:

- *External Community Relations*:
  - With the Organizational Director, coordinate the presentation of ANSER's annual report to the Trustees of the Boise School District.
  - Provide input and guidance in developing public presentations to educate the community about ANSER's mission and education program, and to secure funding.
  - Be a positive and passionate spokesperson for ANSER.
  - Coordinating with the Organization Director, maintain/establish strong community relations with current school families, past school families, Community Board, all school standing committees, Boise School District, State Department of Education, Expeditionary Learning, Boise State University, other interested universities, potential business partners, media community organization state and national Charter School Network, and current and potential donors.
- *Internal Community Relations:*
  - Develop and sustain communication and teamwork among all staff.
  - Conduct/attend regular staff meetings (format to be determined in consultation with Organization Director).
  - Be an active, positive, participatory member of the school community.
  - Collaborate with Executive Committee, Education Committee and Family Council in policies, procedures and programs.
  - Attend Family Council meetings soliciting input in an effort to be responsive to the school community.
  - Attend Anser Community Events such as the Back to School Picnic, the Anser Auction, Exhibition Nights, etc.

Anser Charter School

AN EXPEDITIONARY LEARNING SCHOOL

Organization Director

The Organization Director serves under the direction of and at the pleasure of the Anser Board and in tandem with the Education Director ensures the successful operation of Anser Charter School. Working as a team, the two directors consult and coordinate closely on all issues affecting the other's areas of responsibility. This position is responsible for all non-education related aspects of the school, such as: corporate administration; fiscal management; fundraising; human resource administration; governance support; enrollment, marketing and community relations; lunch program and paid program oversight and facility management and development.

A successful candidate for this position will be a self-starter and multi-tasker with the flexibility and willingness to align with the school's philosophy and culture. A strategic thinker, this individual will be highly skilled in working collaboratively with staff and volunteers, be willing to assist wherever they are needed, possess a keen financial sense, experience in managing staff, and engage in shared leadership with the Anser Board, staff and parents to advance Anser's Mission and Vision. This is not a certified position.

Examples of Job Responsibilities

- Serve as non-voting, ex-officio member of the Anser Board, drafting the agendas and minutes
- Work collaboratively with and train parent volunteers to support fundraising
- Maintain all corporate records and assure compliance with all applicable laws relating to the charter, federal programs, safety, health, by-laws and tax exempt status of Anser
- Collect and report data as required by the state and federal government
- Comply with all financial and organizational reporting requirements of Anser's authorizer and lenders
- Oversee and assist in all areas of the school's finances including budget development, budget oversight, audit, preparing teacher contracts and fiscal reporting
- Supervise administrative/support staff including Office Managers, Fiscal Manager, Organization Coordinator, food service and custodial staff, and contractors (such as the IT contractor)
- Ensure physical safety and health of students and staff through proper maintenance and repair of the building, grounds, playground equipment, safety equipment, etc.
- Implement 10-year facility plan, including routine replacement of mechanical and other equipment, planning facility improvements, procuring and negotiating contracts, securing necessary plans and permits, and serving as the general contractor for facility related projects.

Qualifications:

- Bachelor's degree or its equivalent is preferred
- At least five years' experience in non-profit management preferred
- Demonstrated skills in developing and implementing strategy, managing people, planning, and budgeting
- Evidence of maintaining a professional manner and high degree of diplomacy
- Ability to lead and work collaboratively
- Excellent written and verbal communication skills

This position shall be considered in all respects "employment at will." This at-will relationship cannot be altered unless set forth in writing and signed by the President of the Anser Board. Pursuant to Idaho Code 33-512(15), all first time employees of Anser must submit to a criminal background check. Anser is an Equal Opportunity employer and does not discriminate on the basis of gender, race, religion, national origin, gender identity, or sexual orientation in the education programs and activities it operates.

Appendix F12
Letters of Support from Community Members

GARDEN CITY™
NESTLED BY THE RIVER

OFFICE OF THE MAYOR

6015 Glenwood Street Garden City, Idaho 83714
Phone 208/472-2900 Fax 208/472-2931

May 9, 2019

To Whom It May Concern,

I am writing in support of the application from Anser Charter School for an Anser replication school. Anser has proven to be a valuable community asset by meeting the needs of an under-served population. Anser's proven record of instilling a deep commitment to service and character in young people is needed now more than ever. Our society needs critical thinkers that are willing and trained to collaborate to solve problems. These are core values and goals of Anser.

The demand for admittance into the Anser family currently outpaces the facility capacity. Having an Anser replication school would help fill the demand while exposing additional under-served students to the successful Anser model. It is my request that you act favorably on the replication application.

Sincerely,

John G. Evans
Mayor

EL Education
247 West 35th Street
Eighth Floor
New York, New York
10001
ELeducation.org

May 10th, 2019

To Whom It May Concern:

It is my pleasure to write this letter of support for an Anser replication school in the Boise area. EL Education and Anser have partnered together very successfully for many years, and we understand that it would serve the community if the opportunities that students receive currently at Anser could be brought to a new, underserved population in Boise through the replication of Anser Charter School. Please contact me with any questions and I'd be happy to speak further to our support for this endeavor.

Best Regards,

Nathan Warner
Regional Director, West
EL Education

EL Education
247 West 35th Street
Eighth Floor
New York, New York
10001
ELeducation.org

Martha Martin
10 Davis Drive
Pocatello, Idaho

May 6, 2019

To Whom it May Concern:

This is a letter of support for Anser Charter School as they move forward with plans for a K-5 replication of their school. Anser is celebrating their 20th anniversary this year as a charter school in the state of Idaho and a member of the EL Education national network of schools.

Anser is an EL Education Credentialed School, which means they are implementing best practices in curriculum, instruction, culture and character, assessment, and leadership AND demonstrating impact in three dimensions of student achievement: mastery of knowledge and skills, character, and high quality student work. As a credentialed school, the leaders and teachers at Anser also demonstrate that they are committed to evidence-based strategic improvement, aligning people, time, and money to fulfill a cohesive vision for teaching and learning.

This school has proven to be a high quality educational option for K-8 families, but they want to do more. Their replication plans involve bring the EL Education model to underserved communities in the Boise area, providing robust and meaningful educational experiences in the arts, STEM, service learning, and adventure. With a long waiting list of students just waiting to be a part of the Anser crew, these leaders and teachers will be able to serve many more students each year.

EL Education is proud of our 20 year partnership with Anser Charter School and we support them in the K-5 replication of their program.

Regards,

Martha Martin, School Designer
EL Education

BOISE ROCK SCHOOL

1404 West Idaho – Boise, Idaho – boiserockschool.com – info@boiserockschool.com – 208.572.5055

May 7, 2019

To Whom it May Concern;

We are in full support of Anser replication school. For 8 years we have partnered with Anser Charter School with a myriad of cool classes. We have provided Rock Band Workshops, Film Classes, Rhythm Workshops and other cool classes. Everyone at Anser has always been extremely professional and awesome. The diverse student body at Anser have always been engaged and eager to learn. An Anser replication school would be a treasure for the Treasure Valley. Their model works.

Thank you,

Ryan Peck
Managing Director
Boise Rock School

Feed • Educate • Advocate

May 9th, 2019

To Whom It May Concern,

I along with others at The Idaho Foodbank would like to highly recommend Anser Charter School in Garden City, Idaho to begin work on a replication school in the Boise area. We have worked closely with Anser Charter in the past and have the pleasure of currently working with them now. It has been so great to see the community of Anser Charter help to feed, educate, and advocate for our community.

Our partnership with Anser Charter has helped many families in the community receive food that otherwise we wouldn't have been able to provide. Ms. Reames brought students from Anser to volunteer with us at our warehouse to repackage and distribute food in April and is scheduled to bring another group in this month. Additionally, we have been able to bring our nutrition education and cooking class to their school and teach their students about health, nutrition, and hunger in Idaho. The partnership is one that we hope to continue in the future.

With all of the work done by the students, faculty, and families at this place of learning, I hope they are able to continue to grow in our community making it a better place for everyone touched by their service. Please consider Anser Charter in the creation of a new school in the Boise area. It will undoubtedly be something everyone will benefit from.

Best,

Carly Metcalf, RDN

Nutrition Education Specialist
The Idaho Foodbank

3562 South TK Avenue Boise, ID 83705

O: (907)854-0612
F: (208) 336-9692
E: cmetcalf@idahofoodbank.org
www.idahofoodbank.org

The Independent
School District of Boise City

8169 West Victory Road
Boise, ID 83709

(208) 854-4000
FAX (208) 854-4003

December 11, 2019

Tamara Baysinger
Idaho Public Charter School Commission
304 N. 8th St., Suite 242
Boise, ID 83702

Dear Ms. Baysinger,

On December 9, 2019 our Board of Trustees voted to approve Anser's charter petition, new performance certificate and application to become their own LEA beginning on July 1, 2020. Once our minutes from that meeting have been approved, Sharon Mast, Clerk of the Board, will send them to the PCSC. We appreciate the guidance from the PCSC and all of the time and effort put forth by the Anser staff. Please let me know if you need any additional information.

Sincerely,

Lisa Roberts

Lisa Roberts
Deputy Superintendent
Boise School District

Cc: Heather Dennis, Anser Charter School
Coby Dennis, Boise School District

SUBJECT

Doral Academy of Idaho Proposed Performance Certificate and Pinecrest Academy of Idaho Proposed Performance Certificate.

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5205B Public Charter Schools
IDAPA 08.02.04 Rules Governing Public Charter Schools

BACKGROUND

Idaho statute requires that all public charter schools and their authorizers execute performance certificates within 75 days of petition approval.

On December 12, 2019 the PCSC approved a charter petition for Doral Academy of Idaho (DAI).

On December 13, 2019 the PCSC approved a charter petition for Pinecrest Academy of Idaho (PAI).

DISCUSSION

PCSC staff has collaborated with DAI and PAI to draft the individualized sections of the performance certificate and framework. In these materials, individualized sections of the certificate are highlighted in yellow.

IMPACT

The PCSC has 75 days from the date of new petition approval in which to execute a performance certificate with the school's governing board.

STAFF COMMENTS AND RECOMMENDATIONS

If the PCSC moves to execute the performance certificate, the PCSC chairman and respective school's board chair will sign the certificate, making it effective for the dates specified therein.

COMMISSION ACTION

A motion to execute the performance certificate for Doral Academy of Idaho as presented and to execute the performance certificate for Pinecrest Academy of Idaho as presented.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

CHARTER SCHOOL PERFORMANCE CERTIFICATE

This performance certificate is executed on this 12th day of December, 2019, by and between the Idaho Public Charter School Commission (the "Authorizer"), and Doral Academy of Idaho, Inc (the "School"), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Law, Idaho Code Section 33-5201 *et seq*, as amended (the "Charter Schools Law.")

RECITALS

WHEREAS, on August 26, 2019, Authorizer received a petition to request the creation of a new charter school referred to as Doral Academy of Idaho; and

WHEREAS, on December 12, 2019, the Authorizer approved the charter petition (the "Charter") subject to conditions outlined in Appendix A;

NOW THEREFORE in consideration of the foregoing recitals and mutual understandings, the Authorizer and the School agree as follows:

SECTION 1: AUTHORIZATION OF CHARTER SCHOOL

A. Establishment of School. Pursuant to the Charter Schools Law, the Authorizer hereby approves the establishment of the School on the terms and conditions set forth in this Charter School Performance Certificate (the "Certificate"). The approved Charter is attached to this Certificate as Appendix D.

B. Pre-Opening Requirements. Pursuant to Idaho Code Section 33-5206(6), the Authorizer may establish reasonable pre-opening requirements or conditions ("Pre-Opening Requirements") to monitor the start-up progress of a newly approved public charter school to ensure that the school is prepared to open smoothly on the date agreed. The School shall not commence instruction until all pre-opening requirements have been completed to the satisfaction of the Authorizer. Pre-opening requirements are attached as Appendix C. If all pre-opening conditions have been completed to the satisfaction of the Authorizer, the School shall commence operations/instruction with the first day of school in Fall 2020. In the event that all pre-opening conditions have not been completed to the satisfaction of the Authorizer, the School may not commence instruction on the scheduled first day of school. In such event, the Authorizer may exercise its authority on or before July 20 to prohibit the School from commencing operation/instruction until the start of the succeeding semester or school year.

C. Term of Agreement. This Certificate is effective as of December 12, 2019, and shall

continue through June 30, 2025, unless earlier terminated as provided herein. In addition to the five-year term of operations, the performance certificate term includes a pre-opening period. The school will be open to students starting the 2020-2021 school year.

SECTION 2: SCHOOL GOVERNANCE

A. Governing Board. The School shall be governed by a board (the "Charter Board") in a manner that is consistent with the terms of this Certificate so long as such provisions are in accordance with state, federal, and local law. The Charter Board shall have final authority and responsibility for the academic, financial, and organizational performance of the School. The Charter Board shall also have authority for and be responsible for policy and operational decisions of the School, although nothing herein shall prevent the Charter Board from delegating decision-making authority for policy and operational decisions to officers, employees and agents of the School, as well as third party management providers.

B. Articles of Incorporation and Bylaws. The articles of incorporation and bylaws of the entity holding the charter shall provide for governance of the operation of the School as a nonprofit corporation and public charter school and shall at all times be consistent with all applicable law and this Certificate. The School shall notify the Authorizer of any modification to the Articles or Bylaws within five (5) business days of approval by the Charter Board.

C. Charter Board Composition. The composition of the Charter Board shall at all times be determined by and consistent with the Articles and Bylaws and all applicable law and policy. The Charter Board shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five (5) business days of their taking effect.

SECTION 3: EDUCATIONAL PROGRAM

A. School Mission. The mission of the School is as follows: Through arts integration, individual students focus, and rigorous academics, Doral Academy of Idaho will place students on a path for success at the college and career level.

B. Grades Served. The School may serve students in grades K-8.

C. Design Elements. The School shall implement and maintain the following essential design elements of its educational program:

1. Arts Integration: Arts Integration instructional strategies and methods are best practices utilized to teach the curriculum using art form (drama, music, art, etc.) within the learning process;

2. Data Driven Instruction Model: Doral Inc. has the philosophy that their schools should meet the needs of the community in which they are located and the students they serve, thus, DAI will use results on student interim and summative assessments to make data-driven decisions for the benefit of the student.

D. Standardized Testing. Students of the School shall be tested with the same standardized tests as other Idaho public school students.

E. Accreditation. The School shall be accredited as provided by rule of the state board of education.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

A. Oversight Allowing Autonomy. The Authorizer shall comply with the provisions of Charter School Law and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School. The Authorizer's Role will be to evaluate the School's outcomes according to this Certificate and the Performance Framework rather than to establish the process by which the School achieves the outcomes sought.

B. Charter School Performance Framework. The Charter School Performance Framework ("Performance Framework") is attached and incorporated into this agreement as Appendix B. The Performance Framework shall be used to evaluate the School's academic, financial and operational performance, and shall supersede and replace any and all assessment measures, educational goals and objectives, financial operations metrics, and operational performance metrics set forth in the Charter and not explicitly incorporated into the Performance Framework. The specific terms, form and requirements of the Performance Framework, including any required indicators, measures, metrics, and targets, are determined by the Authorizer and will be binding on the School.

C. Authorizer to Monitor School Performance. The Authorizer shall monitor and report on the School's progress in relation to the indicators, measures, metrics and targets set out in the Performance Framework. The School shall be subject to a formal review of its academic, mission-specific, operational, and financial performance at least annually.

D. School Performance. The School shall achieve an accountability designation of *Good Standing* or *Honor* on each of the three sections of the Performance Framework. In the event the School is a party to a third party management contract which includes a deficit protection clause, the School shall be exempt from some or all measures within the financial portion of the Performance Framework. In accordance with Charter School Law, the Authorizer shall renew any charter in which the public charter school met all of the terms of its performance certificate at the time of renewal.

E. Performance Framework As Basis For Renewal of Charter. The School's performance in relation to the indicators, measures, metrics and targets set forth in the Academic and Mission-Specific, Operational and Financial sections of the Performance

Framework shall provide the basis upon which the Authorizer will decide whether to renew the School's Charter at the end of the Certificate term. As part of the Performance Framework, the Authorizer agrees to consider mission-specific, rigorous, valid, and reliable indicators of the School's performance. These negotiated indicators will be included in the Mission-Specific portion of the Academic and Mission Specific section of the Performance Framework.

F. **Authorizer's Right to Review.** The School will be subject to review of its academics, operations and finances by the Authorizer, including related policies, documents and records, when the Authorizer deems such review necessary. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.

G. **Site Visits.** In addition to the above procedures, the Charter School shall grant reasonable access to, and cooperate with, the Authorizer, its officers, employees and other agents, including allowing site visits by the Authorizer, its officers, employees, or other agents, for the purpose of allowing the Authorizer to fully evaluate the operations and performance of the School. The Authorizer may conduct a site visit at any time if the Authorizer has reasonable concern regarding the operations and performance of the School. The Authorizer will provide the School reasonable notice prior to its annual site visit to the School. The School shall have an opportunity to provide a written response to the site visit report no later than fourteen (14) days prior to the meeting at which the report is to be considered by the Authorizer. If no written response is provided, the School shall have the opportunity to respond orally to the site visit report at the meeting.

H. **Required Reports.** The School shall prepare and submit reports regarding its governance, operations, and/or finances according to the established policies of and upon the request of the Authorizer. However, to the extent possible, the Authorizer shall not request reports from the School that are otherwise available through student information systems or other data sources reasonably available to the Authorizer.

SECTION 5: SCHOOL OPERATIONS

A. **In General.** The School and the Charter Board shall operate at all times in accordance with all federal and state laws, local ordinances, regulations and Authorizer policies applicable to charter schools.

B. **Maximum Enrollment.** The maximum number of students who may be enrolled in the school shall be 489.

C. **Enrollment Policy.** The School shall make student recruitment, admissions, enrollment and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race,

ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the charter school than there are spaces available, the charter school shall select students to attend using a random selection process that shall be publicly noticed and open to the public.

D. School Facilities. 2511 W. Cherry Lane, Meridian, ID 83642. The School shall provide reasonable notification to the Authorizer of any change in the location of its facilities.

E. Attendance Area. The School's primary attendance area is as follows: Meridian Joint School District #2.

F. Staff. Instructional staff shall be certified teachers as provided by rule of the state board of education. All full-time staff members of the School will be covered by the public employee retirement system, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.

G. Alignment with All Applicable Law. The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

A. General. The School shall comply with all applicable financial and budget statutes, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School Performance Framework incorporated into this contract as Appendix B.

B. Financial Controls. At all times, the Charter School shall maintain appropriate governance and managerial procedures and financial controls which procedures and controls shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them (2) a checking account; (3) adequate payroll procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants in accordance with applicable state and federal law.

C. Financial Audit. The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.

D. Annual Budgets. The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format and any other format as may be

reasonably requested by the Authorizer.

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

A. **Termination by the School.** Should the School choose to terminate its Charter before the expiration of the Certificate, it may do so upon written notice to the Authorizer. Any school terminating its charter shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

B. **Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one (1) or more of the terms of its Certificate. Any school which is not renewed shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

C. **Revocation.** The School's Charter may be revoked by the Authorizer if the School has failed to meet any of the specific, written renewal conditions attached, if applicable, as Appendix A for necessary improvements established pursuant to Idaho Code§ 33-5209B(1) by the dates specified. Revocation may not occur until the public charter school has been afforded a public hearing, unless the Authorizer determines that continued operation of the public charter school presents an imminent public safety issue. If the School's Charter is revoked, the School shall work with the Authorizer ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

D. **Dissolution.** Upon termination of the Charter for any reason by the Charter Board, or upon nonrenewal or revocation, the Charter Board will supervise and have authority to conduct the winding up of the business and other affairs of the School; provided, however, that in doing so the Authorizer will not be responsible for and will not assume any liability incurred by the School. The Charter Board and School personnel shall cooperate fully with the winding up of the affairs of the School.

E. **Disposition of School's Assets upon Termination or Dissolution.** Upon termination of the Charter for any reason, any assets owned by the School shall be distributed in accordance with Charter Schools Law.

SECTION 8: MISCELLANEOUS

A. **No Employee or Agency Relationship.** None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, ownership, or employment between the Authorizer and the School.

B. **Additional Services.** Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.

C. **No Third-Party Beneficiary.** This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.

D. **Amendment.** This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and the School have executed this Performance Certificate to be effective December 12, 2019.

Chairman, Idaho Public Charter School Commission

Chairman, Doral Academy of Idaho School Board

Appendix A: Conditions of Authorization/Renewal
Appendix B: Performance Framework
Appendix C: Pre-Opening Requirements
Appendix D: Charter
Appendix E: Public Charter School Closure Protocol

Appendix A: Conditions of Authorization / Renewal

Conditions of Authorization/Renewal

Doral Academy of Idaho was approved on December 12, 2019 with the following conditions:

1 – All board directors shall participate in a staff facilitated governance orientation within 60 days of approval and no less than six hours of staff approved governance training addressing the governance role in financial, operational, and academic oversight and legal compliance prior to May 11, 2020.

2 – The governing board shall present the executed facility lease and/or purchase agreement, record of any long-term debt incurred to date, and a year-one operational budget based on post-lottery enrollment estimates that evidences financial sustainability by May 11, 2020.

Appendix B: Performance Framework

Doral Academy of Idaho
[YEAR] ANNUAL PERFORMANCE REPORT

INTRODUCTION

Each year, Idaho's Public Charter School Commission (PCSC) issues a performance report to every school in its portfolio. The annual report serves several purposes:

1. To provide transparent, data-driven information about charter school quality;

2. To ensure charter school boards have access to clear expectations and are provided maximum opportunity to correct any deficiencies prior to their renewal year; and

3. To inform mid-term authorizing decisions, such as the evaluation of charter amendment proposals.

This report contains an overview of the school, including its mission, leadership, and demographics. The overview is followed by the school's performance framework, including outcomes for the most recently completed school year.

The performance framework clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the PCSC's evaluations of the school. It contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship.

In accordance with Idaho law, the performance framework requires, at a minimum, that each school meet applicable federal, state, and authorizer goals for student achievement. It is designed to fulfill this requirement while respecting the diverse missions and student populations represented in PCSC portfolio schools. This performance framework was adopted by the Idaho Public Charter School Commission on May 4th, 2017.

To facilitate a clear context for the academic results contained in this report, the demographic, enrollment, and school leadership information provided is from the school year during which the data was gathered. Updated enrollment and school leadership information is available upon request from the school or PCSC office.

The data provided in this report was gathered primarily through the State Board of Education and State Department of Education. An independent financial audit and any applicable mission-specific data were submitted directly by the school. The school had a opportunity to correct or clarify its framework outcomes prior to the publication of this report.

Public charter school operations are inherently complex. For this reason, readers are encouraged to consider the scores on individual measures within the framework as a starting point for gaining a full, contextualized understanding of the school's performance.

PERFORMANCE FRAMEWORK STRUCTURE	
The academic section comprises the primary indicators on which most renewal or non-renewal decisions are based. The mission-specific, operational, and financial sections contribute additional indicators that are, except in cases of egregious failure to meet standards, considered secondary.	
Academic	The academic section focuses on quantitative academic outcomes. It reflects the PCSC's commitments to considering schools' performance in the context of their communities and student populations. Although some results may not be made publicly available in certain cases, in order to protect individually identifiable student information, the PCSC may still use this information for purposes of making authorizing decisions.
Mission-Specific	The mission-specific section provides an opportunity for meaningful acknowledgement of schools' achievements that are not reflected elsewhere in the framework. These measures may be academic or non-academic in nature, but must be objective and data-driven. Mission-specific measures are generally optional; however, inclusion of certain mission-specific measures may be required as a condition of the performance certificate.
Operational	The operational section considers whether schools are operating in compliance with federal and state law, authorizer requirements, and the provisions of their performance certificates.
Financial	The financial section evaluates the near-term and long-term financial status of the school. Schools with management contracts containing deficit protection clauses may be exempted from these indicators.

ACCOUNTABILITY DESIGNATIONS	
Calculation of the percentage of eligible points earned for each school determines that school's accountability designation in each section. The accountability designations, in turn, guide authorizing decisions. The PCSC will consider contextual factors affecting a school's accountability designations when making authorizing decisions.	
Honor	Schools achieving at this level in all sections are guaranteed renewal. Replication and expansion proposals are likely to succeed.
Good Standing	Schools achieving at this level in the academic section will be recommended for renewal; however, conditional renewal may be recommended if outcomes in other sections are poor. Replication and expansion proposals will be considered.
Remediation	Schools achieving at this level in the academic section may be recommended for non-renewal or conditional renewal, particularly if outcomes in other sections are poor. Replication and expansion proposals are unlikely to succeed.

Critical	Schools achieving at this level in the academic section face a strong likelihood of non-renewal, particularly if outcomes in other sections are also poor. Replication and expansion proposals will not be considered.

SCHOOL OVERVIEW			
Mission Statement	Through arts integration, individual student focus, and rigorous academics, Doral Academy of Idaho will place all students on a path for success at the college and career level.		
Key Design Elements	1) Arts Integration" Arts Integration instructional strategies and methods are best practices utilized to teach the curriculum fusing an art form (drama, music, art, etc.) within the learning process; 2) Data Driven Instruction Model: Doral Inc. has the philosophy that their schools meet the needs of the community in which that are located and the students they serve. Thus, DAI will use results on student interim and summative assessments to make data-driven decisions for the benefit of the student.		
School Location	2511 W. Cherry Lane Meridian, ID 83642	**School Phone**	208-283-5086
Surrounding District	Meridian Joint School District #2		
Opening Year	2020		
Current Term	2020-2025		
Grades Served	K-8		
Enrollment (Approved)	489	**Enrollment (Actual)**	

SCHOOL LEADERSHIP	

STUDENT DEMOGRAPHICS				
	School	**State**	**Surrounding District**	**Neighboring District**
Non-White				
Limited English Proficiency				
Special Needs				
Free and Reduced Lunch				

ISAT PROFICIENCY RATES	
Percentage of students meeting or exceeding proficiency in Math	
Percentage of students meeting or exceeding proficiency in English Language Arts	
Percentage of students meeting or exceeding proficiency in Science	

GO-ON RATE (Post-secondary enrollment within 12 months of graduation)	

ACADEMIC	Measure	Points Possible K-8	Points Earned K-8	Points Possible 9-12	Points Earned 9-12	Points Possible K-12	Points Earned K-12	Points Possible Alternative	Points Earned Alternative
State Proficiency Comparison	1a	50	0						
	1b	50	0						
District Proficiency Comparison	2a	50	0						
	2b	50	0						
Criterion-Referenced Growth	3a	100	0						
	3b	100	0						
Norm-Referenced Growth	4a								
	4b								
Post-Secondary Readiness	5a								
Total Academic Points		400	0	0	0	0	0	0	0
% of Academic Points			0%						

MISSION-SPECIFIC	Measure	Points Possible	Points Earned
	1		
	2		
	3		
	4		
	5		
	6		
Total Mission-Specific Points		0	0
% of Mission-Specific Points			#DIV/0!

OPERATIONAL	Measure	Points Possible	Points Earned
Educational Program	1a	25	0
	1b	25	0
	1c	25	0
	1d	25	0
Financial Management & Oversight	2a	25	0
	2b	25	0
	2c	25	0
Governance & Reporting	3a	25	0
	3b	25	0
	3c	25	0
	3d	25	0
	3e	25	0
	3f	25	0
School Environment	4a	25	0
	4b	25	0
Additional Obligations	5a	25	0
Total Operational Points		400	0
% of Operational Points			0%

FINANCIAL	Measure	Points Possible	Points Earned
Near-Term	1a	50	0
	1b	50	0
	1c	50	0
	1d	50	0
Sustainability	2a	50	0
	2b	50	0
	2c	50	0
	2d	50	0
Total Financial Points		400	0
% of Financial Points			0%

The financial measures above are based on industry standards. They are not intended to reflect nuances of the school's financial status. Please see the financial section of this framework for relevant contextual information that may alleviate concern.

ACCOUNTABILITY DESIGNATION	Range (% of Points Possible)	Academic Gen Ed Outcome	Academic Alt Outcome	Range	Mission Specific Outcome	Range	Operational Outcome	Range	Financial Outcome
Honor	75% - 100%			75% - 100%		90% - 100%		85% - 100%	
Good Standing	55% - 74%	0%	0%	55% - 74%	NA	80% - 89%	0%	65% - 84%	0%
Remediation	31% - 54%			31% - 54%		61% - 79%		46% - 64%	
Critical	0% - 30%			0% - 30%		0% - 60%		0% - 45%	

School outcomes will be evaluated in light of contextual information, including student demographics, school mission, and state/federal requirements.

All proficiency and growth measures will be scored using the ISAT by SBAC, or any state-required standardized test as may replace it. Subject area (math and ELA) may be replaced by similar subject areas if necessary due to statewide changes. On all applicable measures, standard rounding to the nearest whole number will be used for scoring purposes. Measures based on ISAT outcomes exclude alternate ISAT data; as a result, the outcomes shown may differ slightly from those published on the State Department of Education's website.

INDICATOR 1: STATE PROFICIENCY COMPARISON

		Result	Points Possible	Points Earned
Measure 1a	**Do math proficiency rates meet or exceed the state average?**			
Math Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in math exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

		Result	Points Possible	Points Earned
Measure 1b	**Do English Language Arts proficiency rates meet or exceed the state average?**			
ELA Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in ELA exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

INDICATOR 2: DISTRICT PROFICIENCY COMPARISON

		Result	Points Possible	Points Earned
Measure 2a	**Do math proficiency rates meet or exceed the district average?**			
Math Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in math either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Meridian Joint School District #2 will be used for comparison			

		Result	Points Possible	Points Earned
Measure 2b	**Do ELA proficiency rates meet or exceed the district average?**			
ELA Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in ELA either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Meridian Joint School District #2 will be used for comparison			

INDICATOR 3: CRITERION-REFERENCED STUDENT GROWTH (GRADES K-8)

		Result	Points Possible	Points Earned
Measure 3a	**Are students making adequate academic growth to achieve math proficiency within 3 years or by 10th grade?**			
Criterion-Referenced Growth Math	**Exceeds Standard:** At least 85% of students are making adequate academic growth in math.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in math.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in math.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in math.		0-25	0
				0
Notes				

		Result	Points Possible	Points Earned
Measure 3b	**Are students making adequate academic growth to achieve English Language Arts proficiency within 3 years or by 10th grade?**			
Criterion-Referenced Growth ELA	**Exceeds Standard:** At least 85% of students are making adequate academic growth in ELA.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in ELA.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in ELA.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in ELA.		0-25	0
				0
Notes				

OPERATIONAL

	INDICATOR 1: EDUCACTIONAL PROGRAM			
Measure 1a **Implementation of Educational Program**	**Is the school implementing the material terms of the educational program as defined in the charter and performance certificate?**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: The school implements the material terms of the mission, vision, and educational program in all material respects, and the implementation of the educational program reflects the essential elements outlined in the charter and performance certificate. A cohesive professional development program is utilized.		25	
	Partially Meets Standard: The school partially implements the material terms of the mission, vision, and educational program. However, implementation is incomplete, not cohesive, inconsistent, unclear, and/or unsupported by adequate resources and professional development.		15	
	Does Not Meet Standard: The school has deviated from the material terms of the mission, vision, and/or essential elements of the educational program as described in the performance certificate, without an approved amendment, such that the program provided differs substantially from the program described in the charter and performance certificate.		0	
				0
Notes				

Measure 1b **Educational Requirements**	**Is the school complying with applicable educational requirements?**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to educational requirements, including but not limited to: Instructional time requirements, graduation, and promotional requirements, content standards including the Common Core State Standards, the Idaho State Standards, state assessments, and implementation of mandated programming related to state or federal funding.		25	
	Partially Meets **Standard:** The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to educational requirements; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to educational requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

OPERATIONAL

Measure 1c	Is the school protecting the rights of students with disabilities?	Result	Points Possible	Points Earned
Students with Disabilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to: Equitable access and opportunity to enroll; identification and referral, appropriate development and implementation of IEPs and Section 504 plans; operational compliance, including provisions of services in the LRE and appropriate inclusion in the school's academic program, assessments, and extracurricular activities; discipline, including due process protections, manifestation determinations, and behavioral intervention plans; access to school's facility and programs; appropriate use of all available applicable funding.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 1d	Is the school protecting the rights of English Language Learner (ELL) students?	Result	Points Possible	Points Earned
English Language Learners				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to requirements regarding ELLs, including but not limited to: Equitable access and opportunity to enroll; required policies related to the service of ELL students; compliance with native language communication requirements; proper steps for identification of students in need of ELL services; appropriate and equitable delivery of services to identified students; appropriate accommodations on assessments; exiting students from ELL services; and ongoing monitoring of exited students.		25	
	Partially Meets Standard: The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of ELL students; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to requirements regarding ELLs; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

OPERATIONAL

INDICATOR 2: FINANCIAL MANAGEMENT AND OVERSIGHT

		Result	Points Possible	Points Earned
Measure 2a	**Is the school meeting financial reporting and compliance requirements?**			
Financial Reporting and Compliance				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial reporting requirements, including but not limited to: Complete and on-time submission of financial reports including annual budget, revised budgets (if applicable) periodic financial reports as required by PCSC, and any reporting requirements if the board contracts with an Education Service Provider; on-time completion and submission of the annual independent audit and corrective action plans (if applicable); and all reporting requirements related to the use of public funds.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial reporting requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial reporting requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 2b	**Is the school following General Accepted Accounting Principles (GAAP)**			
GAAP				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit, including but not limited to: An unqualified audit option, an audit devoid of significant findings and conditions, material weakness, or significant internal control weaknesses; and an audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit. Any matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits failure to comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 2c	**Is the school successfully enrolling the projected number of students?**			
Enrollment Variance				
	Meets Standard: Enrollment variance equaled or exceeded 95 percent in the most recent fiscal year.		25	
	Partially Meets Standard: Enrollment variance was between 90 and 95 percent in the most recent fiscal year.		15	
	Does Not Meet Standard: Enrollment variance was less than 90 percent in the most recent fiscal year.		0	
				0
Notes	Enrollment variance is calculated by dividing actual mid-term enrollment by the enrollment projection in the school's board-approved budget, as submitted to the SDE at the beginning of the fiscal year.			

INDICATOR 3: GOVERNANCE AND REPORTING

Measure 3a	Is the school complying with governance requirements?	Result	Points Possible	Points Earned
Governance Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board, including but not limited to: board policies; board bylaws; code of ethics; conflicts of interest; board composition; and compensation for attendance at meetings.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to governance by its board; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3b	Is the board fulfilling its oversight obligations?	Result	Points Possible	Points Earned
Board Oversight				
	Meets Standard: The school's board practices consistent, effective oversight of the school, including but not limited to frequent review of the school finances and academic outcomes. Board meeting agendas, packets, and minutes reflect competent oversight practices and actions to foster academic, operational, and financial strength of the school, including ongoing board training, policy review, and strategic planning. The school's board has adopted and maintains a complete policy book.		25	
	Partially Meets Standard: Some of the school board's oversight practices are underdeveloped, inconsistent, incomplete, or reflect a need for additional training. Board meeting agendas, packets, and minutes reflect meaningful efforts toward self-evaluation and improvement. The school's policy book may be substantially complete but require additional maintenance.		15	
	Does Not Meet Standard: The school's board fails to practice consistent, effective oversight of the school, and/or documentation of competent oversight practices and actions is not maintained. The school's policy book may be incomplete, unmaintained, or non-existent.		0	
				0
Notes				

Measure 3c	**Is the school complying with reporting requirements?**	**Result**	**Points Possible**	**Points Earned**
Reporting Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities, including but not limited to: accountability tracking; attendance and enrollment reporting; compliance and oversight; and additional information requested by the authorizer.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3d	**Is the school complying with public transparency requirements?**	**Result**	**Points Possible**	**Points Earned**
Public Transparency				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency, including but not limited to: maintenance of its website, timely availability of board meeting minutes, and accessibility of documents maintained by the school under the state's Freedom of Information Act, Open Meeting Law, Public Records Law, and other applicable authorities.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency. Any instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3e	**Is the school meeting employee credentialing and background check requirements?**	**Result**	**Points Possible**	**Points Earned**
Credentialing & Background Checks				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to state and federal certification and background check requirements.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to state and federal certification and background check requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to state and federal certification and background check requirements; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3f	**Is the school handling information appropriately?**	**Result**	**Points Possible**	**Points Earned**
Information Handling				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information, including but not limited to: maintaining the security of student records under the Family Educational Rights and Privacy Act and other applicable authorities; storing and transferring student and personnel records; and securely maintaining testing materials.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the handling of information; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

	INDICATOR 4: SCHOOL ENVIRONMENT			
Measure 4a	**Is the school complying with transportation requirements?**	**Result**	**Points Possible**	**Points Earned**
Transportation				
	Meets Standard: The school provides student transportation within its primary attendance area and materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to transportation.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or requirements of the performance certificate relating to transportation; and/or provides and incomplete form of transportation services. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to transportation; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board; and/or the school does not provide transportation.		0	
				0
Notes				

Measure 4b	**Is the school complying with facilities requirements?**	**Result**	**Points Possible**	**Points Earned**
Facilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and requirements of the performance certificate relating to the school facilities and grounds, including but not limited to: Americans with Disabilities Act, fire inspections and related records, viable certification of occupancy or other required building use authorization, and documentation of requisite insurance coverage. The school facility is clean, well-maintained, and adequate for school operations.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the school facilities and grounds. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board. Additional facility maintenance and/or updates have been recommended by DBS.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the school facilities and grounds; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board. The school facility may be in need of modification or repair required by DBS.		0	
				0
Notes				

	INDICATOR 5: ADDITIONAL OBLIGATIONS			
Measure 5a	**Is the school complying with all other obligations?**	**Result**	**Points Possible**	**Points Earned**
Additional Obligations				
	Meets Standard: The school materially complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein, including but not limited to requirements from the following sources: revisions to statute and administrative rule; requirements of the State Department of Education; and requirements of the accrediting body.		25	
	Partially Meets Standard: The school largely complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein. Matters of non-compliance, if any, are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with all other material legal, statutory, regulatory, or contractual requirements contained in its charter contract that are not otherwise explicitly stated herein; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

INDICATOR 1: NEAR-TERM

		Result	Points Possible	Points Earned
Measure 1a	**Current Ratio: Current Assets divided by Current Liabilities**			
Current Ratio				
	Meets Standard: Current Ratio is greater than or equal to 1.1 OR Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's). *Note: For schools in their first or second year of operation, the current ratio must be greater than or equal to 1.1.*		50	
	Does Not Meet: Current Ratio is between 0.9 and 1.0 or equals 1.0 OR Current Ratio is between 1.0 and 1.1 and one-year trend is negative.		10	
	Falls Far Below Standard: Current ratio is less than or equal to 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1b	**Current Ratio: Cash divided by Current Liabilities**			
Cash Ratio				
	Meets Standard: Cash Ratio is greater than 1.0 OR Cash Ratio is equal to 1.0 and one-year trend is positive (current year ratio is higher than last year's).		50	
	Does Not Meet: Cash Ratio is between 0.9 and 1.0 OR Cash Ratio equals 1.0 and one-year trend is negative.		10	
	Falls Far Below Standard: Cash ratio is equal to or less than 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1c	**Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses minus Depreciation Expense/365)**			
Unrestricted Days Cash				
	Meets Standard: 60 Days Cash OR Between 30 and 60 Days Cash and one-year trend is positive. *Note: Schools in their first or second year of operation must have a minimum of 30 Days Cash.*		50	
	Does Not Meet: Days Cash is between 15-30 days OR Days Cash is between 30-60 days and one-year trend is negative.		10	
	Falls Far Below Standard: Fewer than 15 Days Cash.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1d	**Default**			
Default				
	Meets Standard: School is not in default of financial obligations. Financial obligations include, but are not limited to: nonpayment, breach of financial representation, non-reporting, non-compliance, financial judgements, loan covenants, and/or tax obligations.		50	
	Does Not Meet: School is in default of financial obligations.		0	
				0
Notes				

	INDICATOR 2: SUSTAINABILITY			
Measure 2a	**Total Margin: Net Income divided by Total Revenue AND Aggregated Total Margins: Total 3-Year Net Income divided by Total 3-Year Revenues.**	**Result**	**Points Possible**	**Points Earned**
Total Margin and Aggregated				
3-Year Total Margin	**Meets Standard:** Aggregated 3-yar Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. *Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.*		50	
	Does Not Meet: Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".		30	
	Falls Far Below Standard: Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2b	**Debt to Asset Ratio: Total Liabilities divided by Total Assets**	**Result**	**Points Possible**	**Points Earned**
Debt to Asset Ratio				
	Meets Standard: Debt to Asset Ratio is less than 0.9.		50	
	Does Not Meet: Debt to Asset Ratio is between 0.9. and 1.0		30	
	Falls Far Below Standard: Debt to Asset Ratio is greater than 1.0		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2c	**Cash Flow: Multi-Year Cash Flow = Year 3 Total Cash - Year 1 Total Cash AND One -Year Cash Flow = Year 2 Total Cash - Year 1 Total Cash**	**Result**	**Points Possible**	**Points Earned**
Cash Flow				
	Meets Standard: Multi-Year Cumulative Cash Flow is positive and Cash Flow is positive each year OR Multi-Year Cumulative Cash Flow is positive, Cash Flow is positive in one of two years, and Cash Flow in the most recent year is positive. Note: Schools in their fist or second year of operation must have positive cash flow.		50	
	Does Not Meet: Multi-Year Cumulative Cash Flow is positive, but trend does not "Meet Standard"		30	
	Falls Far Below Standard: Multi-Year Cumulative Cash Flow is negative.		0	
				0
Notes				

Measure 2d	**Debt Service Coverage Ratio: (Net Income + Depreciation + Interest Expense)/(Annual Principal, Interest, and Lease Payments)**	**Result**	**Points Possible**	**Points Earned**
Debt Service Coverage Ratio				
	Meets Standard: Debt Service Coverage Ratio is equal to or exceeds 1.1		50	
	Does Not Meet: Debt Service Coverage Ratio is less than 1.1		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Appendix C: Pre – Opening Requirements

New School Pre-Opening Requirements

The following items must be collected by the PCSC for your school's files.

ITEM	COLLECTION BY PCSC
Performance Certificate Executed	
Bylaws Executed	
Articles of Incorporation	
Conflict of Interest and/or Code of Ethics Statement	
Facility Lease or Mortgage Executed	
Annual Board Approved Budget	
501c3 Approval Letter	
Org Chart	
Board Member and School Leader Contact Information (PCSC Dashboard)	
Emergency Incident Team Communication Plan	

The school has successfully completed all of the tasks as outlined in the accompanying task lists.

ITEM	PCSC Verification
Enrollment is Sufficient for Operation	
Meeting 1 Tasks (see "Pre-Opening Checklist", "Meeting 1 - October" tab)	
Meeting 2 Tasks (see "Pre-Opening Checklist", "Meeting 2 - December" tab)	
Meeting 3 Tasks (see "Pre-Opening Checklist", "Meeting 3 - February" tab)	
Meeting 4 Tasks (see "Pre-Opening Checklist", "Meeting 4 - April" tab)	
Meeting 5 Tasks (see "Pre-Opening Checklist", "Meeting 5 - June" tab)	
Final Tasks and Facilities Visit (See "Pre-Opening Checklist", "Final Facilities Visit - August" tab)	

Certificate is hereby given that all facts and representations on this assurance document are true and correct.

Printed Name and Title of Authorized Charter School Representative

Signature Date

Printed Name of PCSC Representative

Signature Date

Appendix D: Charter

Doral Academy of Idaho

A proposed public charter school serving Kindergarten-8th Grade students.

Proposed opening: August of 2020
Located within the Meridian Joint School District #2
Submission Date: August 26th 2019

Carolyn Baird
2045 W. Verona Dr., Meridian, ID 83646
208-283-5086
carolynbairdrealestate@gmail.com

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EXECUTIVE SUMMARY

Doral Academy of Idaho (DAI) is a newly proposed charter school, which intends to serve students in grades Kindergarten through 8th Grade in the Meridian, Idaho area. DAI is dedicated to creating an enhanced and engaging educational experience for all its students and will provide an academically challenging learning environment with a strong emphasis on arts integration teaching strategies. These strategies have proven to increase literacy, cognitive, and social development and will build a foundation for all students to be college and career ready. DAI seeks to replicate the high performing Doral academic model which has proven successful for students in both Florida and in Nevada. In Nevada, for example, a Doral middle school and a Doral elementary school were each ranked among the top ten performing schools statewide. The Doral schools in Nevada dramatically outperform their local school districts using an academic model that has been explicitly aligned to the English Language Arts and Mathematics standards shared by both Nevada and Idaho.

Mission

Through arts integration, individual student focus, and rigorous academics, Doral Academy of Idaho will place all students on a path for success at the college and career level.

Vision

Doral Academy of Idaho seeks to improve our community by creating students who think critically and analytically, are confident decision makers, utilize problem-solving skills, work collaboratively, and are imaginative and creative thinkers. We are committed to equipping students with the skills and personal growth necessary to be successful scholars throughout life.

Community Need

DAI's primary attendance area will focus on students and families in the Meridian, Idaho area. This community has recently experienced a significant rise in population which in turn has led to overcrowding at public schools and demand from parents for additional quality educational options.

Organizational Structure

The Doral Academy of Idaho is organized exclusively for educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code. The governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The policies, procedures, powers, and duties by which the board will operate, including specific member powers, are detailed in the attached bylaws.

Student Outcomes and Expectations

Driven by its mission and vision to ensure all students are successful in life, DAI has established goals which will focus on high academic achievement for all students in all grade levels. These goals are detailed in *Section I. Educational Program*.

I. EDUCATIONAL PROGRAM

Educational Philosophy

Doral Academy of Idaho (DAI) is a newly proposed charter school, which intends to serve students in grades Kindergarten through 8th Grade in the Meridian, Idaho area. Replicating the highly successful Doral Academy curriculum model found in both Florida and Nevada, DAI will use an arts integration model in order to fulfill its mission and vision, as shown below:

Mission

Through arts integration, individual student focus, and rigorous academics, Doral Academy of Idaho will place all students on a path for success at the college and career level as measured by state and local assessments.

Vision

Doral Academy of Idaho seeks to improve our community by creating students who think critically and analytically, are confident decision makers, utilize problem-solving skills, work collaboratively, and are imaginative and creative thinkers. We are committed to equipping students with the skills and personal growth necessary to be successful scholars throughout life. In doing so, we will ensure that our alumni are educated persons who are flexible, adaptive learners both as young people and adults who are ready to meet the economic, social, and intellectual challenges they will face in the 21st century.

DAI's educational philosophy is built upon innovative learning methods. Through the arts, (music, dance, theatre, visual arts, and media production) students will be afforded the opportunity to learn in a way that meets their own unique cultural, intellectual, social, and emotional needs. Students' minds will be opened and understanding deepened through project-based learning. Learning will focus on creativity, problem-solving, collaboration, perseverance, and the ability to work through the rigorous demands, set forth by the Idaho Content Standards (ICS) and measured by the ISAT assessment. The school's program is modeled after specific arts integration learning methods and strategies that have proven successful in raising both student engagement and achievement, including on assessments such as Nevada's SBAC that are based on the same ambitious standards and share items with the ISAT.

As defined by Lynne B. Silverstein and Sean Layne from the Kennedy Center, "Arts Integration is an approach to teaching in which students construct and demonstrate understanding through an art form. Students engage in a creative process which connects an art form and another subject area and meets evolving objectives in both."[1] At DAI, instruction in core subjects (i.e. – math, reading, science, etc.) is integrated with content and skills from the arts—dance, music, theater, and the visual arts. Students at DAI will benefit from a seamless blending of the content and skills of an art form with those of a co-curricular subject.

[1] Silverstein, Lynne B. & Layne, Sean. "Defining Arts Integration". (2010). The John F. Kennedy Center for the Performing Arts.

The benefits of arts integration on educational and social outcomes for students has long been a topic of study and, is thus, founded in sound research. Just a few examples of this research are detailed below:

- Arts integration is highly effective in engaging and motivating students.[2]
- Arts integration positively affects student academic achievement as well as executive functions (i.e. – representational knowledge, operational processes, self-regulation, etc.).[3]
- Being in an arts integrated classroom increases the odds for students to pass assessments in both English language arts as well as mathematics.[4]
- The arts can engage students who are not typically reached through traditional teaching methods, including those from economically disadvantaged backgrounds, reluctant learners, and those with learning disabilities. [5,6,7]
- Through experimenting with different art forms and processes, students learn to take risks through exploration and to develop flexible thinking skills, envisioning from different vantage points and responding to new possibilities in the creative process.[8]

Arts Integration enables students to make meaningful connections to one another, to themselves, to their world, and to other content areas. Arts integration supports the academic achievement and improved social behavior of students while enhancing school climate and parental involvement. Instruction through arts integration is a mutually beneficial method for teaching. Through the arts, students are able to approach the content in other subject areas via multiple entry points and, in turn, are able to solidify their understanding of the arts through by integrating it with core academic subjects. Additionally, the arts provide students multiple modes for demonstrating learning and competency and it enlivens the teaching and learning experience for entire school communities. "At its best, arts integration is transformative for students, teachers, and communities. The imaginations and creative capacities of teachers and students are nurtured and their aspirations afforded many avenues for realization and recognition."[9]

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[2] Hardiman, M., Rinne, L. and Yarmolinskaya, J. (2014), "The Effects of Arts Integration on Long-Term Retention of Academic Content". Mind, Brain, and Education, 8: 144-148.

[3] Moss, T. E., Benus, M. J., & Tucker, E. A. (2018). "Impacting urban students' academic achievement and executive function through school-based arts integration programs". SAGE Open, 8(2), 1–10.

[4] Walker, E., Tabone, C., & Weltsek, G. (2011). "When achievement data meet drama and arts integration". Language Arts, 88(5), 365–372.

[5] Deasy, R.J. (Ed.). (2002). Critical links: Learning in the arts and student achievement and social development. Washington, D.C.: The Arts Education Partnership.

[6] Fiske, E.B. (1999). Champions of change: The impact of the arts on learning. Washington D.C.: Arts Education Partnership and the President's Committee on the Arts and the Humanities.

[7] Stevenson, L.M. & Deasey, R.L. (2005). Third space: When learning matters. Washington D.C.: Arts Education Partnership.

[8] Ibid.

[9] Doral Academy of Nevada – Saddle Campus, *Art Integration,* [website], URL: https://doralsaddle.org/apps/pages/index.jsp?uREC_ID=267172&type=d; last accessed June 2019.

DAI is committed to engaging all learners by educating the whole person: mind, body, and heart. DAI believes in high standards of achievement, in a culturally responsive school environment, can be realized through active learning by using an arts integrated approach, nurturing a strong sense of belonging to the school.

Student Academic Achievement Standards

Driven by its mission and vision to ensure all students are successful in life, DAI has established the following goals:

1. By its third year of operation, at least seventy-five percent (75%) of 3rd-8th Grade students will achieve proficient or higher on the annual ISAT summative assessment for English Language Arts (ELA)/Literacy.
2. By its third year of operation, at least seventy-five percent (75%) of 3rd-8th Grade students will achieve proficient or higher on the annual ISAT summative assessment for Mathematics.
3. By its third year of operation, at least seventy percent (75%) of 5th and 7th Grade students will achieve proficient or higher on the annual ISAT summative assessment for Science.
4. If an achievement gap exists between students in targeted at-risk student subgroups (economically disadvantaged, English Language Learners (ELL), Students with Disabilities (SWD) and other at-risk groups) and the general student population, DAI decrease the achievement gap between each subgroup and the general student population by at least thirty percent (30%) by the end of its third year of operation, as measured by the summative ISAT as well as the school's selected interim benchmark assessments.[10]
5. One hundred percent (100%) of Student and Parent Survey results will display a "Rating" or higher for students receiving individual focus and for students facing rigorous academics, as measured by the end-of-year Student and Parent Survey

These goals have been partly established by examining the current academic achievement results of schools in DAI's target area. (For more information, please see the discussion of student achievement in area schools in *Section IV. Student Demand and Primary Attendance Area*.) After examining these results, DAI firmly believes that the goals it has established above are both ambitious and attainable.

Importantly, the goals set for ELA/Literacy, Mathematics, and Science are substantially higher than the most recent statewide elementary performance in those subject areas: 54.4 percent, 45.5 percent, and 61.4 percent respectively. They also exceed recent elementary performance levels for the local West Ada School District in ELA/Literacy and Mathematics: 66.5 percent and 58.1 percent. while approaching the 73.5 percent performance of the district in Science. Similarly, these goals would also result in the charter school exceeding the state average proficiency in middle school in ELA/Literacy, Mathematics, and Science: 54.4 percent, 44.5 percent, and 61.4 percent respectively and they exceed the district's 66.5 percent ELA/Literacy proficiency and 58.1 percent Mathematics proficiency.

[10] This goal will be achieved without reducing the rigor and performance of the general student population.

In addition to exceeding recent state and local district averages in ELA/Literacy and Mathematics, we believe that these goals are appropriately ambitious for several reasons. Most notably, the proposed targets in all three subject areas meet or exceed those of the likely cohort of sending schools, which are analyzed in greater detail in *Section IV. Student Demand and Primary Attendance Area*. Secondly, these targets also reflect the reality that while the state standards in reading and mathematics were adopted some time ago, there are recent changes to the state's science standards that merit the adoption of more conservative science goals until such time as there is additional data on how those standards adjustments will impact assessment results in 5th and 7th grade.

Additionally, since science is only assessed twice in grades 3-8, the n-size of students is considerably smaller within a given year and there is likely to be more variability in performance, especially in the early years of implementing a new set of standards and a new assessment. Moreover, our approach to science and social studies instruction is based on a thoughtful implementation of the embedded social studies, science, and technical subject standards in grades K-5 of the Idaho ELA/Literacy Content Standards as well as the separate and aligned Literacy in History/Social Studies, Science, & Technical Subjects standards for the applicable secondary grades of our proposed middle school. Finally, our theory of change is based on the fundamental premise that arts integration is a potent strategy to engage students and improve pupil performance across subject areas, but it is tempered by the reality that high achievement in science and social studies, particularly at the higher grades, is predicated on strong literacy and numeracy skills.

Due to this confluence of reasons, we suspect that science proficiency may initially lag the proficiency levels we project in English Language Arts/Literacy and Mathematics during the early years of implementation, both due to the nature of our implementation and the likelihood that the shift to a new science assessment based on the new standards results in a more rigorous assessment will mirror the general pattern of the shift to more ambitious ELA/Literacy and Mathematics standards: results on the new science test based on the new standards will indicate a lower baseline level of proficiency than the standards and assessments used up until recently.

Given these and other factors, DAI administration and relevant faculty will continually monitor progress towards our academic targets and propose that the governing board adapt these goals as needed on a yearly basis to ensure that their mission of preparing all students for success at the college and career level is being fulfilled and that the school is on track to meet or exceed the then current standards under any applicable performance framework. Importantly, because the local district's performance is substantially higher than the state as a whole, the founding board has chosen to focus primarily upon proficiency. Based on our research, however, we have discovered that some charter schools ultimately enroll a student body that faces greater initial academic challenges than its host district. Depending on baseline student achievement results, for example, it may ultimately be necessary to supplement these targets with internal annual academic growth and subgroup improvement targets building on those baselines to

ensure that the school is meeting the needs of all of its learners and is on track to meet the proficiency targets specified above and the expectations of the Commission's Performance Framework.

Key Design Elements, Curricula, Tools, and Instructional Methods

Replicated Educational Model & Affiliation

DAI plans to replicate the highly successful curriculum model of Doral Academy Inc. (Doral Inc.). The affiliation with Doral Inc. is a key partnership in the success of the curriculum development plan. Doral Inc. has successfully opened and implemented this curriculum model and best practices at additional Doral schools in both Florida and Nevada. The Doral curriculum model includes four key components:

1. Standards Aligned Curriculum (to the state in which the school is located): Nevada and Florida each have aligned their ELA and Math Curriculum to the Common Core Standards (CCSS). Thus, as Idaho formally adopted the CCSS as the ELA and Mathematics components of the Idaho Core Standards (ICS), the program will be readily replicable and aligned to the rigor of the ICS. Furthermore, and pending approval of the petition, the Principal will work closely with Doral Academy Inc. to ensure DAI's Science curriculum is aligned to the Idaho Science Standards adopted early last year (2018).
2. Arts Integration: Arts Integration instructional strategies and methods are best practices utilized to teach the curriculum fusing an art form (drama, music, art, etc.) within the learning process;
3. Basal Textbooks and Other Support Materials: standards aligned materials that support learning;
4. Data Driven Instruction Model: Doral Inc. has the philosophy that their schools should meet the needs of the community in which they are located and the students they serve. Thus, DAI will use results on student interim and summative assessments to make data-driven decisions for the benefit of the student.

Doral Academy Inc. provides support in best practices in implementing this curriculum model. The support provided by Doral Inc. includes, but is not limited to: a standards aligned curriculum; developing school-specific course scope and sequences based on local community needs and designed to increase buy-in of teachers and leadership; Arts Integration instructional strategies and methods; a Data Driven Instructional model; Positive Behavioral Support; support in starting a new school; and staff training. With this support, DAI's Governing Body and Principal, are provided the freedom to plan their own course scope and sequences and select the type(s) of art-form (instructional strategies) that will be implemented in the school. This model allows DAI to best meet the needs of its unique community while simultaneously being able to draw expert support to ensure student success.

Awards and Distinctions

The Doral Academy Inc. curriculum model has been highly successful in the opening of six schools in Florida and seven schools in Nevada. In recent years, two Doral Florida middle schools, Doral Academy Charter Middle School and Doral Academy of Technology, were named National Blue Ribbon Schools in 2015 and 2017 respectively. Additionally, a Doral Florida high

school, Doral Performing Arts & Entertainment Academy, was named a National Blue Ribbon School in 2014. Nevada Doral schools also distinguish themselves. In 2018, the first year that the State of Nevada reported charter school performance by individual school as opposed to at the charter-holder level, two Doral schools, Doral Academy Red Rock Elementary School and Doral Academy Cactus Middle School, were ranked in the top ten schools statewide in their grade bands for their performance in the first full year of the revised Nevada School Performance Framework. Local parents are also pleased with the network's performance, with Doral Academy of Nevada receiving the Gold Medal recognition as the best charter school in southern Nevada in the 2018 annual Best of Las Vegas program run by the *Las Vegas Review Journal*.[11]

These successes at the elementary and middle school levels are harbingers of the plaudits received by the established Doral high schools that are fed by these programs[12]. Two of the Doral Academy High Schools in Florida have been consistently ranked as one of the nation's top schools. Doral Academy Charter High School, Florida continues to be ranked as one of the nation's top high schools according to US News & World Reports.[13] Fifty three percent (53%) of their population qualifies for Free and Reduced Lunch and ninety four percent (94%) are minorities. Doral Performing Arts and Entertainment Academy continues to be ranked as one of the nation's top high schools according to US News & World Reports. Fifty one percent (51%) of their population qualifies for FRL and ninety one percent (91%) are minorities. Please see *F2 – Doral Academy Network Data*, for additional information.

Additional distinctions awarded to the Doral Academy network include, but are not limited to, the following:

- Named one of the top high schools in the nation according to Newsweek in 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2009, and 2008.
- Named one of the top high schools according to the Washington Post in 2016, 2015, 2014, 2013, 2012, 2011, 2010, and 2009.
- Named one of the top 500 schools in the nation for eight consecutive years according to US News and World Reports 2008-2016.
- Named one of the top high schools in the country by the Daily Beast since 2012-2013.
- Named #1 school by Florida Trend Magazine 2017
- NCUST Silver Award Winner 2017

[11] Las Vegas Review Journal. "Best of Las Vegas" [website]. URL: https://bestoflasvegas.com/listing/best-charter-school; last accessed August 2019.

[12] The Doral Nevada high school program began operation with a 9th grade in 2016-17 and is growing by a grade per year. It will not graduate its first class until 2020. Consequently, the program is too new for a graduation rate or other key indicators of high school quality to be publicly reported.

[13] U.S. News & World Report. *Education – Best High Schools – Florida – Districts – Miami-Dade County.* "Doral Academy Charter High School" [website]. URL: https://www.usnews.com/education/best-high-schools/florida/districts/miami-dade-county-public-schools/doral-academy-charter-high-school-4892; last accessed June 2019.

Alignment to Standards

DAI's ELA and Math curriculum is aligned with the Idaho Content Standards (ICS). As stated above, DAI will work with the Principal, once hired, as well as Doral Academy, Inc., to align the Science, Social Studies, and all other content curriculums to the ICS. These standards provide a consistent, clear understanding of what pupils are expected to learn at each grade level. The framework will be taught using arts integration strategies and methods aligned with the core content overviewed below:

English Language Arts

Through carefully designed differentiated literacy instruction, DAI's ELA instruction will follow the ICS for English/Literacy in practices consisting of the following:

- Building a strong reading foundation
- Accessing complex text
- Finding and using text evidence
- Engaging in collaborative conversations
- Writing for different genres

Using a rich range of diverse print and digital media, DAI's elementary reading series, *Wonders*, provides the instructional support and materials necessary to teach the rigor, intent, and depth needed to fulfill and extend students' literacy learning. For students in the middle school grades, the school will utilize the SpringBoard Curriculum. We envision our teachers building on this content with engaging lessons that, among other things, integrate the arts into the study of language. For example, one exciting lesson developed by Doral's partner, the Kennedy Center, is entitled "Adjective Monster." This lesson begins with a read-aloud of the children's book *Go Away Big Green Monster* and brief direct instruction, using examples from the text, explaining what an adjective is and how it is used to describe an emotion or an element of someone's appearance. Students then brainstorm a list of adjectives to describe monsters as a group. After each student selects a favorite adjective to describe a monster, they design their own monster reflecting that adjective using geometric shapes and construction paper while the teacher circulates both to monitor for on-task behavior and to check for understanding. The lesson culminates in a gallery walk where students have the opportunity to explain their monsters and their favorite adjectives.

Pursuant to Idaho Admin. Code r. 08.02.01.103.02.a., students in elementary school will also receive instruction in handwriting consistent with the Idaho Content Standards for English Language Arts/Literacy: Literacy in History/Social Studies, Science, Technical Subjects, and Handwriting.[14]

Mathematics

DAI will follow the ICS for Mathematics. The following practices are embedded throughout the school's mathematics curriculum:

[14] IDAPA 08.02.01.103.02.a. (March 2014)

- Make sense of problems and persevere in solving them.
- Reason abstractly and quantitatively.
- Construct viable arguments and critique the reasoning of others.
- Model with mathematics.
- Use appropriate tools strategically.
- Attend to precision.
- Look for and make use of structure.
- Look for and express regularity in repeated reasoning.

These mathematical practices are utilized along with DAI's core elementary mathematics program, *Investigations*, to deepen the students' knowledge in arithmetic, basic facts, but most importantly, mathematical thinking, conceptual understanding, and reasoning. Arts integration in mathematics will take many forms. One potential early elementary exploration, expanding on a Kennedy Center lesson for the early elementary years, builds on the third grade standard 3.OA.D.9., "[i]dentify arithmetic patterns (including patterns in the addition table or multiplication table), and explain them using properties of operations," has students study A-B patterns and more complex patterns in both the arts and in mathematics. Through this exploration, students will learn new applications of the words pattern and repetition, recognize AB patterns and more complex patterns in nature and manmade objects or material, construct an AB pattern and more complex patterns using small manipulatives, practice AB patterns and more complex patterns using simple items found in the classroom, and participate in a group activity that reinforces the AB pattern and more complex patterns. For students in middle school grades, the school will utilize the SpringBoard Curriculum.

While the curriculums for Science and Social Studies have not been completely vetted to ensure their alignment to ICS at this time, DAI believes that the curricula for both subjects will similarly mirror the following:

Science

Science instruction revolves around hands-on experiences through the guidance of the Next Generation Science Standards (NGSS) and the ICS. Science instruction will use FOSS kits as well as teacher created units. The FOSS Program bridges research and practice by providing tools and strategies to engage our students in enduring experiences that lead to deeper understanding of the natural and designed worlds. The hands-on approach of FOSS is also particularly aligned with DAI's approach to arts integration. As noted above, science staff will supplement the FOSS modules with staff-selected content and staff-developed activities to provide greater depth and coverage in some areas of the NGSS. School-based supplements also provide the opportunity for faculty to delve deeper into arts integration in the sciences. For example, one Doral school in Nevada has created model content in the area of earth science wherein early middle school students learn a "continental drift dance" as part of their initial exposure to plate tectonics. This is part of a school-created supplement to the middle school FOSS Earth Science Course which serves to provide more explicit content on the subject of continental drift, consistent with ESS2-MS-3, the ICS/NGSS standard which expects students to

"[a]nalyze and interpret data on the distribution of fossils and rocks, continental shapes, and seafloor structures to provide evidence of the past plate motions."

Social Studies

Social Studies instruction provides foundational skills that are key to building communication, collaboration, and critical thinking. Following the ICS, teachers will create units and utilize the 21st Century Skills to teach students how to make informed and reasoned decisions for the public good as citizens of a culturally diverse, democratic society in an interdependent world. As with science, there are myriad opportunities for arts integration and to select and customize content to our local context, including content offered by our Kennedy Center partner. For example, ICS Social Studies standard 4.SS.1.3.1 requires that fourth grade students be able to "[i]dentify the five federally recognized American Indian tribes in Idaho: Coeur d'Alene, Kootenai, Shoshone-Bannock, Nez Perce, and Shoshone-Paiute Tribes and current reservation lands," while ICS Social Studies standard 4.SS.1.3.2 sets forth the expectation that students be able to "[d]iscuss how Idaho's tribes interacted with and impacted existing and newly arriving people." In addition to teacher-created content that will address this standard, our Kennedy Center partner has developed a lesson, "Lewis and Clark: Prized Possessions," which integrates the arts with social studies content to give students insight into both the experience of the first western explorers to enter Idaho, the role played by a local Lemhi Shoshone woman, Sacajawea, and one particular aspect of her culture at the time of contact. In grades K-5, Social Studies Standards will be taught through Thematic Units. In Middle School Grades, students will take Social Studies courses.

Scope and Sequence/Pacing Guide and Curriculum Selection

The faculty of the school will develop a scope and sequence or pacing guide for each course. DAI will receive support in Professional Development for setting this process up through the Doral Academy, Inc. affiliation. This tool serves as the basis for lesson plan development to ensure that all benchmarks are addressed in a timely manner. The scope and sequence, or pacing guide, will largely be aligned to the basal text. Teachers will develop and/or provide additional resources such as novels of varying genres, as may be necessary, to teach benchmarks not adequately addressed in the basal text. The faculty of the school will also develop a reading and mathematics instructional focus calendar to provide a framework which enables all faculty and support staff to simultaneously address the same standards. As teachers plan both as grade level cohorts and individually in their classrooms, they will make sure to identify:

1. The overall goal of the Lesson/Unit;
2. What students will understand as a result; and
3. Measurable objective that align with the a) content strand(s) and b) art strand

Particularly in the area of science and social studies, curriculum adoption is driven by several factors, including elementary and middle school teacher content familiarity and the desire to foster creativity and ensure deep teacher ownership in these content areas versus a taking a more prescriptive textbook approach which may take away from the sense of ownership of these subject areas. Additionally, we have a deep desire to provide more hands-on activities

and encourage our teachers to develop units that are not only rigorous, but also relevant to student context (e.g. units that connect to Idaho in some way); and growing teacher comfort with and proficiency in arts integration strategies in science and social studies in out years (beyond year 3). Consequently, we intend to seek teacher and leadership voice and input in both core and supplemental resources in science and social studies through the scope and sequence process and the refinement of scopes and sequences in subsequent years versus pursuing exclusive adoptions of textbooks in these subject areas.

Common Board Configuration

Teachers will implement the Common Board Configuration (CBC), which provides a uniform structured itinerary strategically located in the identical location in each classroom. The CBC helps pupils adapt to instructional routines and procedures. CBC includes: bellwork, the Essential Question (EQ), the measurable objective, activities, and homework. Please see Table 1 below:

Table 1: Common Board Configuration Example	
Date: April 12th, 2018	**Vocabulary:** Adjective
Bell Ringer: Review definition of Education Philosophy	**Agenda:** 1. Bell Ringer 2. Review "Educational Philosophy" 3. Introduce "CBC" 4. Think, Pair, Share 5. Etc.
Benchmarks: Demonstrate an understanding of Common Board Configuration	
Objective: I can… describe what a Common Board Configuration is.	
Essential Question: What is the Common Board Configuration?	**Summarizing Activity:** Questions and Answers
	Homework: Write a 1-page paper on the CBC

Electives

Kindergarten-5th Grade Electives

The goal of the K-5 electives is to provide students exposure to many different genres of the arts. The students will be on a rotating schedule to experience these throughout the year. In year one of operation the school may not be able to provide all of these electives, however, as the school expands enrollment, DAI will work to offer all of these specials/electives to provide optimal exposure to its students. The electives are as follows in **Table 2** below:

Table 2: Elementary (K-5) Electives			
Music	**Visual and Performing Arts**	**World Languages**	**Other Electives**
• Music • Violin	• Art • Dance • Media Arts • Theatre	• Spanish	• Technology

6th-8th Grade Electives

DAI understands the importance of offering a high quality selection of electives to enrich the curriculum and provide an attractive alternative as a viable school of choice.[15] DAI will maximize options for electives by having middle school teachers lead at least one elective addition to their core classes. Proposed electives are demonstrated in **Table 3** below:

Table 3: Middle (6-8) Electives

Music	Visual and Performing Arts	World Languages	Other Electives
• Beginning Band • Advanced Band • Beginning Chorus • Advanced Chorus • Guitar	• Art • Introduction to Media Technology • Media Production • Theatre	• Beginning Spanish 1 (8th Grade for High School Credit)	• Leadership • Office Aide

As DAI grows, the school plans to incorporate these or similar programs, based on student interest, school resources and state requirements. The guiding principle will be that electives are selected to reinforce school goals for arts exposure and integration.

Integrating the Arts Instructional Strategies

Arts Instructional Strategies and Methods are the best practices utilized to teach the curriculum fusing an art form within the learning process. The process of integrating the arts is a multi-tiered process that takes several years. Following the model of Doral Inc. and working with the Kennedy Center of Performing Arts, DAI will use the same process to integrate Arts Instructional Strategies and Methods to teach the standards aligned curriculum.

DAI will implement two school-wide Arts Instructional Strategies and Methods each year. All staff will receive professional development on these strategies. The school only selects two so that they can be taught with validity, and so that students can learn to produce the outcomes of the methods comprehensively. All staff will implement these strategies and methods throughout their core curriculum. Each year the school will add additional school-wide strategies to broaden their toolbox of Arts Instructional Strategies. DAI will also start with one core curriculum area to focus on Arts Integrations strategies and each year add another core curriculum area. The following will be the process of integrating the arts in the first three years of operation:

Table 4: Arts Instructional Strategies 3-Year Integration

Year of Operation	Focus	Genre	Strategies
Year 1	ELA	Drama	Tableau On/Off
Year 2	ELA	Drama	ABA Actor's Toolbox

[15] In DAI's first year, the 6th grade will operate as a self-contained elementary classroom. By DAI's second year of operation, the 6th and 7th grades will be departmentalized and operate as a middle school.

Year 3	Math/Science	Dance	Moving Through Math-Grouping Game and Patterns
**By year three of operation, all teachers will have six arts integrated instructional strategies to utilize. The school will continue this process of adding a new strategy each year. The Arts Integration Coach will be the "Keeper of the Strategies;" they will make sure that new teachers that join the staff receive professional development in the school-wide strategies.*			

Deeper Level Thinking Skills

Planning, enacting, and reflecting upon the creations developed from the arts integration methods are essential aspects to developing deeper level thinking skills. Integration of the visual arts, along with engaging drama and dance activities, support the refinement of reading skills that facilitate the deeper level thinking and enhanced comprehension skills that are embedded throughout the ICS:

- Developing Sensory Images: Use multiple senses to create mental images when reading by visualizing the setting, characters, and action of the text, creating a mental movie.
- Inferring: Draw conclusion and make interpretations based on information provided, but not specifically stated, reading between the lines.
- Analyze: The ability to identify and analyze literary elements.
- Synthesis: Take information from what they have read, combine it with prior knowledge, and create something new.

Year One

Tableau

Students represent people, places and things using their bodies. In Tableau, students work together to create a frozen group "picture" to communicate content in any subject. (Example: Human Slide Show-several tableau's to show a sequence of a story, beginning-middle and end, cause and effect, etc.).

1. Students can make a tableau about anything that is being studied.
2. Tableau groups shouldn't be larger than three – five students.
3. Designated each group's rehearsal space and the presentation space.
4. Short timeframes work best. Challenge students to create their tableaux in three-five minutes.
5. All students rehearse at once. It's important that each student begin in NEUTRAL. Both feet on the floor, standing tall, arms at side, and focus on a point in the distance.
6. Count students in as they move from neutral to tableau, 5-4-3-2-1-tableau.
7. Challenge students to hold their tableau, staying completely frozen from five to ten seconds.

In this arts integration approach, students will be involved in actively and socially learning. Students in small groups will read a written text often combined with a visual text. The group needs to make sense of their information and show their comprehension of the text through specific choices made, making a tableau. A tableau is a frozen picture the students act out or make with their bodies. The students must justify through a verbal response how they are

representing the written text. They must explain what they understood from the text and the choices they made in creating that frozen picture. A tableau is a tangible representation of what they are comprehending. If the students are not comprehending the passage they read correctly, the teacher will prompt them to go back to the text and try again.

The strength of this process is that they must work collaboratively and cooperatively in a group. This is engaging because they are working in a social setting and have to put on a "performance." Students are willing to go back and fix their answers. Through this reiteration process the students go through, the students gain a deeper level thinking process and greater understanding which is aligned to the skills in the ICS.

On-Off

In the drama exercise On-Off, students are given the verbal command to position themselves as "On" or "Off".

- OFF: When students are prompted "off," they will stand in NEUTRAL next to their desks or in a circle facing out, hands at sides, faces neutral as if they have been switched OFF.
- ON: Students are prompted with a vocabulary word or topic from any subject the class is studying. For example, when studying Social Studies the teacher may say "Regal Leader, ON" or when studying Mathematics the teacher may prompt "Equilateral triangle ON." Students FREEZE in the shape of the desired vocabulary work or topic until prompted to return to OFF.

Students will be asked to explain their "on" positioning, and deconstruct why they chose to represent their vocabulary word or topic in the manner they did. Student's explanations guided by teacher questioning will teach high level thinking skills.

Year Two

ABA Form and Movement

The difference between movement and dance is similar to the difference between an essay and poem-the difference between the literal and the figurative. Dance in the classroom is a useful tool when students are to express their complex ideas or feelings. (Example: Each student creates a movement of their vocabulary word or character).

Students can begin to create dances with a beginning, middle, and end by using the simple ABA form (also used in Music):

- Beginning: Section A - Tableau
- Middle: Section B - Movement
- End: Section A - Ends with return to the same Tableau

Planning, enacting and reflecting upon Tableau work, in addition to an engaging drama activity. addresses many reading comprehension skills:

- Developing Sensory Images: Use multiple senses to create mental images when reading by visualizing the setting, characters, and action of the text, creating a mental movie.

- Inferring: Draw conclusion and make interpretations based on information provided, but not specifically stated, reading between the lines.
- Synthesis: Take information from what they have read, combine it with prior knowledge, and create something new the Dance.

Acting Right-Building a Cooperative, Social, and Kinesthetic Community
Acting Right takes the foundation elements of acting such as concentration, cooperation, and collaboration and created a structured process, which can become the basis for effective classroom management. The components include the following:

- The Actor's Toolbox
- The Concentration Circle
- The Cooperation Challenge
- One-Minute Challenge

Character Interview
Students in the role of reporters interview students who answer the questions in the role they represent. For example, reporters interview departing pioneers in St. Louis to discover why they are going west and what they hope to find.

Role-Play
In role-play, students are invited to explore situations as if they were someone else. When in role, students respond as that person would think, feel, and speak, expressing attitudes and points of view in response to questions, situations, relationships and problems to be solved. Role Play builds student understanding of an empathy for people throughout history, scientist, math thinkers, and characters in literature. Students should be encouraged to fully research characters prior to the role-play. Below is an example of a Doral student prepping for their performance as Harriet Tubman, the students had to write an in depth report and then "act" it out.

Image 1: Role-Play Example

Year Three

Right Brain Observational Tool (RBOT)

Students practice the skills of careful observation and detailed description. RBOT can be adapted for use with visual content (photographs, charts, illustrations, artworks) as well as with performing arts (audio and video). Students are encouraged to delay inference in order to consider multiple possible meanings.

- Step 1: Observe-Share the image or sample, asking students to observe in silence for one minute (or the length of the sample).
- Step 2: Students describe what they see or notice in the image or sample, using the sentence stem "my eyes see…", "my ears hear…"
- Step 3: Wonder-Students wonder about multiple meanings, possible inferences or content.

Dance is Best

Students represent, ideas, feelings, and content through movement. They come to understand that dance and movement can be tools of expression. They will use the basic elements of Best to explore, and to create, and finally to abstract movement. (Examples include demonstrating beats and patterns).

Body – Parts of the body plus Loco motor and Non-Loco motor Movements
Energy – How is the body moving
Space/**S**hape – Big, small, Levels 1-10
Time – Tempo, Rhythm, Speeds

Other Innovative Strategies

Through the Doral affiliation agreement, DAI will work extensively with artists from the Kennedy Center to develop additional content modules based on our particular context and needs that are beyond those that the Kennedy Center has previously created and disseminated through its ArtsEdge program. The following are two examples of collaborations that the Doral system has engaged in the past and will seek to build upon in the development of Doral Academy of Idaho:

- *Artist: Marcia Daft*
  Project: Moving Through Math-Grouping Game and Patterns
  When students are involved in Moving Through Math, they experience math concepts visually aurally, spatially, kinesthetically, verbally, and socially. This allow for a wide degree of differentiation among students as they have the opportunity to experience math concepts through a variety of learning modalities.

- *Artist: Melanie Rick*
  Project: Reading Portraits as Biographies: Observe. Infer. Inquire
  Portraits are often viewed as a mere depiction of a person when in actuality they can be read as biographies that communicate significant information about a person's life. The

training focuses on observing portraits, discussing portraits, interpreting portraits, and inquiring about portraits.

Additionally, DAI will seek to hire teachers with an interest, appreciation, and/or background in the visual or performing arts. Teachers will be encouraged to utilize those skills to further integrate the arts into their own classrooms. For example, if a second grade teacher is hired who has a background in playing the guitar, they may implement music and song throughout their lessons in addition to the school-wide instructional strategies.

Since Arts Integration is about the process, each lesson or unit will highlight the Objective (Content and Arts), Process, Product, and Reflection. In most elementary school classes, lesson and units will have at least two components: 1) The applicable standard, and 2) How it will be demonstrated through arts integration. (This starts in year one).

In Middle School, the students will complete a semester long Arts Integration project in their ELA course. Though this project will be mostly facilitated in their ELA course, the project will have cross-curriculum elements and each core curriculum teacher will spend time addressing those elements for the students to add to their projects. (This starts in year one).

The Administrative Team will attend the annual national Kennedy Center Changing Education Through the Arts (CETA) Conference in Washington D.C. as well as relevant regional conferences focused on arts integration.

Additional Research-Based Instructional Strategies

Moreover, teachers will also implement other research-based instructional strategies including but not limited to:

- Differentiated Instruction – DAI's ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instruction strategies that connect with individual student's learning needs. Teachers will manage instructional time to meet the standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience.
- Scaffolding - Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year goes on, the student becomes more adept at skills and at directing his or her learning, and becomes more autonomous.
- Inquiry-Based Learning - Based on the scientific method, this student-centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills.
- Project-based learning (PBL): PBL integrates knowing and doing. Students learn knowledge and elements of the core curriculum, but also apply what they know to solve authentic problems and produce results that matter. Though PBL, teachers will engage

students in DAI projects where students can take advantage of digital tools to produce high quality, collaborative products.

- Information Processing Strategies - Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, reciprocal teaching, graphic organizers, scaffolding, or webbing.
- Other High Yield Instructional Strategies: According to "Classroom Instruction that Works: *Research-based Strategies for Increasing Student Achievement*" by Robert Marzano, the following strategies are highly effective:
    - Cooperative Learning - Teachers should limit use of ability groups, keep groups small, apply strategy consistently and systematically and assign roles and responsibilities in groups.
    - Identifying similarities and differences - Students should compare, classify, and create metaphors, analogies and non-linguistic or graphic representations.
    - Summarizing and Note Taking - Students should learn to eliminate unnecessary information, substitute some information, keep important information, write / rewrite, and analyze information. Students should be encouraged to put some information into own words.
    - Nonlinguistic Representations - Students should create graphic representations, models, mental pictures, drawings, pictographs, and participate in kinesthetic (hands-on) activities in order to assimilate knowledge. (Also an arts integration strategy).
    - Generating and Testing Hypothesis - Students should generate, explain, test and defend hypotheses using both inductive and deductive strategies through problem solving, history investigation, invention, experimental inquiry, and decision-making.

Data Methods and Systems

Assessing DAI's educational effectiveness is essential to ongoing growth in excellence for individual students as well as in regards to developing our school-wide model to truly be responsive to our students' needs. In order to have a holistic approach to assessment, multiple school level assessments, both formative and summative, will be utilized to measure specific learning outcomes. Other of forms of assessment and data collection will include the ISATs. DAI will participate in all federal and state required assessment programs as directed by the Idaho Department of Education (IDE), following all required policies and procedures with regard to administration of tests and standardized practices. DAI will administer whichever assessments are chosen to be utilized within the State's accountability system, should they change in the future. In addition to the data collected from the statewide assessment program, DAI will monitor academic growth of individual students, cohorts of students, and the progress of the school as a whole.

DAI's administration will select commercially available assessments that best fit the needs of their students. DAI administration will also purchase a commercially available standardized instrument (universal screener) based on recommendations from the IDE and Doral Inc. Though

it is not yet finalized, DAI is likely to utilize the following assessments for benchmark assessments:

- STAR Reading Benchmark Assessments (Grades 3-8)
- STAR Math Benchmark Assessments (Grades 6-8)
- i-READY Math Assessment (Grades 3-5)

Teachers will also create pre-post assessments and implement portfolio assessments to regularly monitor students in their classrooms.

Strategies for Serving Special Populations

At-Risk

In accordance, with Idaho Administrative Code, DAI defines "at-risk" as "any secondary student grade six through twelve (6-12) who meets any three (3) of the following criteria:"[16]

- Has repeated at least one (1) grade.
- Has absenteeism that is greater than ten percent (10%) during the preceding semester.
- Has an overall grade point average that is less than 1.5 (4.0 scale) prior to enrolling in an alternative secondary program.
- Has failed one (1) or more academic subjects in the past year.
- Is below proficient, based on local criteria or standardized tests, or both.
- Is two (2) or more credits per year behind the rate required to graduate or for grade promotion.
- Has attended three (3) or more schools within the previous two (2) years, not including dual enrollment.
- Has documented or pattern of substance abuse.
- Is pregnant or a parent.
- Is an emancipated youth or unaccompanied youth.
- Is a previous dropout.
- Has serious personal, emotional, or medical issue(s)
- Has a court or agency referral.
- Demonstrates behavior that is detrimental to their academic progress.

DAI's highly involved system of data assessment, monitoring, and Response to Intervention (RtI) model will ensure that all at-risk students are identified and supported to ensure that all students have the opportunity to be academically successful.

Special Education

As a public charter school, admission to DAI will have no exclusionary component, and special education students will be encouraged to enroll in the same manner as non-special education students are recruited. All of our recruitment materials will be tailored to address the concerns of students with disabilities and their parents. Once enrolled, students with special education needs will be included in the school's regular education and extracurricular environment to the

[16] IDAPA 08.02.03.110.01 (June 2019)

extent that such participation is consistent with each special education student's individualized education program (IEP). In all cases, the school will conduct special education as it is outlined for each individual special education student in his/her IEP. The charter school will convene IEP review meetings in order to review and revise IEPs as appropriate. The school always will attempt to place the special education student to the maximum extent appropriate in a learning environment with both his/her disabled and non-disabled peers, in accordance with the student's IEP.

As part of the school's registration process (after the student has been accepted in lottery), parents will be asked if the student has an IEP. If the parent marks "Yes" a Pop-up window requests the parent to provide the student's current IEP and any other relevant documents. In addition, the school registrar will request special education records from each student's previous school to ensure that current documentation is received in the event the parent is unable to provide this documentation or does not disclose the student's disability status for whatever reason. The paperwork is collected and a caseload spreadsheet of all enrolling students with special education eligibility is created. Parents will also be requested to turn in 504s, but the school will also take proactive steps to request such records on behalf of all students immediately following the receipt of a records transfer form from the parent.
All students will be assessed using DAI's universal progress monitoring. Analysis of the progress monitoring will allow the school to begin to identify students who may need additional support. Students will then be scheduled into classes based on need (e.g. - intervention classes).

Middle School
Students who develop academic or behavior problems in middle school will be routed into a Response to Intervention (RtI) process to provide intervention, collect data, and progress monitor. For example, a student who develops a mental health issue will be put into a Check-In/Check-Out program. The program includes daily progress monitoring sheets. A mentor will meet with the student at least three times daily and additional time may be added if necessary. The daily progress monitoring sheet which is point-based can be used to track improvement in behavior and/or anxiety. Students with academic problems can scheduled into intervention classes in an area of need. After-school tutoring programs can also help students gain lacking academic skills. While federal law requires that IEPs include secondary transition services plans by the age of 16, students who will turn 16 during the effective period of their IEP should also have a transition plan created to ensure that those services are provided once they reach the required age. DAI's Professional Development will include the area of Transition so that appropriate transition services and goals can be provided in such cases, notwithstanding the possibility that the student's receiving high school may choose to consult with the student and the parent on modifications to the transition plan once the student graduates from DAI's eighth grade and enters high school.

Over-Identification
Students who are inappropriately placed in special education will be identified by progress monitoring on a routine weekly basis through their IEP goals. Students also take quarterly universal progress monitoring assessments that all students in the school are given. The special

education teacher will complete a monthly analysis of data to determine if students are meeting their goals. If students are meeting their behavior and/or academic goals and progress monitoring is showing growth, the IEP team can meet to discuss the exit of students who are no longer showing academic or behavioral needs.

If the school has a student who needs transitioning out of special education, the IEP team may transition the student out by revising the IEP to provide consultation services during the reevaluation period. If the team determines that student no longer needs an IEP, said student will be referred to the school psychologist who, with parental permission, will reevaluate the student. The IEP team will then meet to determine if a student is still eligible in the eligibility category or does not meet eligibility.

Continuum of Services

The continuum of services offered by the charter school begins in regular education classes. All students are given a universal progress monitoring assessment monthly. The school analyzes the data. Each quarter the school meets as a team during "Data Day" which allows the school to discuss children scoring in the bottom 15% or another cut score as determined by the school. Students who score in the bottom 15% and students who are failing are discussed. The staff brainstorms different interventions that may help the student gain academically or behaviorally. In general education, intervention periods are scheduled in daily to provide instructional level academics to all students. In addition, after school tutoring clubs and blended online learning programs, provide instructional level interventions.

If the student is still not showing progress on the universal progress monitoring, the student will enter into an RtI program. During RtI, a goal is written in the deficit academic area, the student is provided with additional interventions, and the student has weekly progress monitoring related to the goal. The data is graphed and analyzed every 6-8 points. If the student's graphed line is not moving toward the grade level trend line, then instruction becomes more intensive by increasing the amount of time in intervention, increasing the number of sessions in intervention, or changing the teaching method. If, after 12-16 data points, the student's graph still shows a lack of progress, the student will be referred to special education team. Consistent with Federal law and guidance, a parent may also request a comprehensive evaluation at any time, including prior to commencement of or during the RtI process.

Once the evaluations are complete, the team will reconvene to discuss the results of the evaluation and determine eligibility for special education. The school will provide a copy of the eligibility report, along with copies of all evaluations to the parents. The conference may convene without the parent under the following conditions: (1) the parent waives his or her responsibility to attend, or (2) the parent has neglected to respond to three documented communication efforts.

Once this conference is completed, the team will develop an Individualized Education Program (IEP), determining what special education or related services will benefit the child.

An IEP will be completed describing the special services, and the parent or guardian will sign a Consent for Special Education Form. Once this process has been completed and the team, including the parents, is in complete agreement with the provisions of the IEP, the IEP will be signed and services will begin immediately.

IEP Yearly Reviews

Once a year, or more frequently if necessary, there will be a team conference, that includes the individuals described in §300.344, and other qualified professionals, regarding each child on an IEP. During this conference, team members will discuss the progression toward annual goals and objectives, develop new goals and objectives, and determine whether the child's special needs can continue to be appropriately met through the current educational placement. To initiate such a conference, the special education teacher will send home a Prior Written Notice accompanied by a Notice to Conference Form. As with the initial IEP meeting guidelines, the special education teacher must give the parent a number of opportunities to participate and document at least three attempts to establish communication prior to holding an IEP meeting without the parent.

Three-year Reevaluations

Reevaluations will be conducted in accordance with the procedures outlined above regarding initial evaluations if conditions warrant a reevaluation or if the child's parent or teacher requests an evaluation. They will occur at least once every three years. An IEP meeting will follow to develop new goals and objectives. IEP teams cannot exit or deny students from services based on reevaluations finding that a student no longer meets initial eligibility criteria. The School Leader and the special education staff will maintain exceptional records, and proper measures will be taken to ensure that they are kept confidential pursuant to applicable laws and regulations. These procedures include but are not limited to allowing parents the right to inspect any files pertaining to their child, maintaining a record of all parties gaining access to exceptional files, amendment of records at parent request, parental consent, procedural safeguards, destruction of data, children's rights, and providing a free appropriate public education (FAPE).

Least Restrictive Environment

Consistent with the principle of least restricted environment, most students who are determined to be eligible for special education services would first receive support in regular education with supplementary aides and services and progress monitoring would continue. If the student showed no academic growth, a resource room would be added. A Resource Room could then be added up to 50% of the day to provide the necessary interventions to show academic growth.

Students with severe intellectual disabilities also can benefit from combining inclusion with a resource room. In the regular education classroom, using peer assisted learning and online programs can help the student remain with typical peers and receive intensive instructional level instruction.

Students with severe emotional disabilities also can benefit from combining inclusion with a resource room. In addition, a Check-In/Check-Out system is very effective for students with emotional needs. A mentor is assigned to the student and the student has a daily progress monitoring sheet which goes home daily. The student's parent bridges their behavior at school to privileges at home. Depending on the student's needs, the mentor will check in with student at least three times a day, though more can be done if needed. Furthermore, the school counselor can help the family with locating appropriate community support.

Depending on the nature of and severity of the disability, other placement models outside of the approach discussed above may be determined to be more appropriate to the needs of the student. As a local education agency, the charter school could explore contracting for a change in setting in a manner consistent with Idaho Department of Education procedures or bringing in other resources to meet the student's needs.

Staffing

DAI's administration team will recruit highly qualified special education teachers through multiple means. They will use job recruiting websites such as Teachers to Teachers and DAI's administration will attend and recruit teachers at Teacher Fairs in several states. Teachers who are not certified in Idaho will apply for teacher certification. All related service personnel including speech and language therapists and school psychologists will be certified in the State of Idaho or they have to apply for a license before they are hired.

Staff Development

DAI will schedule Professional Development (PD) days into their yearly calendar. PD will be offered in the areas of intensive interventions and research validated methods addressing the unique needs of students with disabilities. Additionally, the special education teachers, the special education facilitators, and the related service personnel (eg. SLP and OT) will be in communication with teachers providing instructional information on how to modify the curriculum and address the unique needs of students with disabilities on a weekly basis as service is provided.

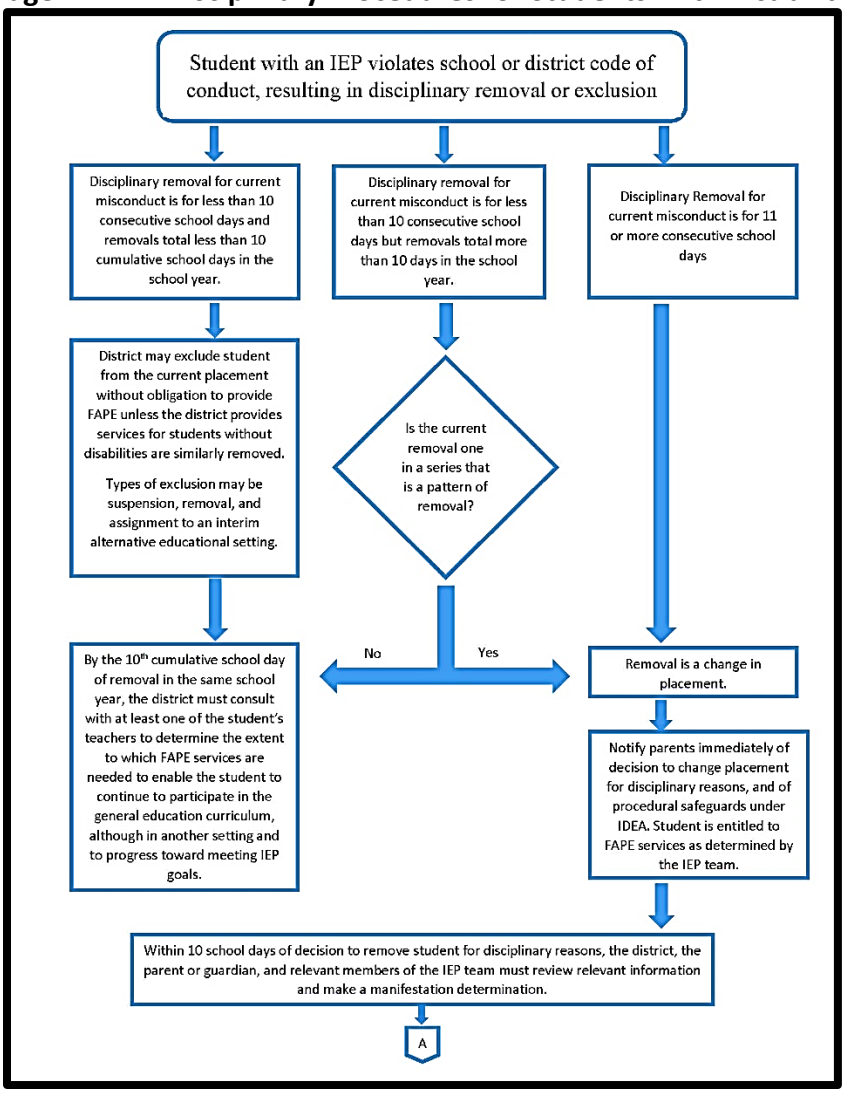
Discipline

The rights of students with disabilities are protected by following the IDEA flow chart below. If a student with disability has a discipline problem, the administration contacts the parent for a parent meeting. If the student is suspended, all school work may be picked up daily by the parent and returned so that student's grades are not affected. Alternately, the school can provide the work by other means. If necessary, a teacher will provide service in the home setting or the student will receive alternative instruction in an after school program.

The IEP team will also meet after 5 suspensions to complete a manifestation determination IEP meeting. The team will brainstorm other services and community resources that may benefit the student to prevent further behavior disruptions. A Functional Behavior Assessment (FBA) will be completed and the team will reconvene to write a Behavioral Intervention Plan (BIP). The team may also request a Behavior Therapist to help in the process.

If the student has reoccurring events that result in further suspension, the team will meet after nine suspensions and complete a change of placement. The administration will contact the parent for a parent meeting. Each time a student is suspended, all school work may be picked up daily by the parent and returned so that student's grades are not affected or other arrangements may be made to ensure access to assignments. Again, if necessary, a teacher will provide service in the home setting or the student will have alternative instruction in an after school program. Please see **Image 2**[17] below:

Image 2: IDEA Disciplinary Procedures for Students With Disabilities



Monitoring

DAI's special education programs comply with all federal and state laws. The role of the special education facilitator is a complete compliance review on all IEPs before and after the IEP meetings. In addition, a review of the confidential folder will be completed monthly on all

[17] Bateman, David F. & Bateman, C. Fred. *A Principal's Guide to Special Education, 3rd Edition.* Council For Exceptional Children. Arlington. (2014).

confidential folders. Special education facilitators check annual and three-year dates weekly to make sure all meetings are held on time.

Special education teacher's complete progress monitoring on a weekly basis to evaluate for student growth and success. If a student shows no academic growth, a resource room is added. A resource Room can be added up to 50% of the day to provide the necessary interventions to show academic growth. If a student shows academic growth, then said student will be provided a less restrictive placement with support. As the student successfully progresses towards full time in the general education curriculum, direct support services can be implemented by the special education teacher in the regular education classroom with supplementary aides and services until they receive consultation services. Quarterly progress reports are sent home. Progress reports are also sent home more frequently as determined by an IEP team. Student grades are also monitored weekly to see academic growth. If students are not receiving enough support determined by weekly progress monitoring and grade checks then the IEP is revised.

Once students are in middle school, a daily monitoring sheet will be used and includes looking at direct instruction participation, classwork participation, homework turn-in, and citizenship. Each teacher signs the student out of class. Special Education teachers check students out at the end of the day. Copies of the form go home with the students for parents to sign. Special education teachers keep a copy and the student returns the signed copy the next day when they pick up their new folder.

Special education facilitators will help to monitor the academic and behavioral growth of students with disabilities in order to ensure that student needs are being met. Adjustments to a student's instructional programs are made accordingly through the collaboration with the SPED team (teachers, administration, and SPED Facilitators) and progress monitoring.

Parental Involvement

All DAI staff will follow all IDEA procedures when implementing appropriate programs related to IEP evaluations/re-evaluations by phoning parents to set up meetings and then following with two prior written notices.

Check-In/Check-Out systems and progress monitoring reports are sent home on a predetermined frequency: daily or weekly. Quarterly progress reports and report cards are mandatory universal grade reports. Special education teachers and related staff are expected to have frequent communication with parents with students with emotional and or behavioral needs.

In this digital age, teachers even text back and forth with a parent through the day if necessary to give them updates if a parent requests to be informed. In addition, the school uses an online program and websites where they post all school events and homework assignments.

English Language Learners

Identification

DAI will identify the primary language of students upon enrollment. The process is as follows:

- All newly-enrolled students are provided an A Home Language Survey (HLS) is included in the enrollment packet.
- Based on the answers provided to the questions in the HLS, student records will be requested from the student's last school/school district. Students without a WIDA Placement will be given a placement test.
- All student screening and evaluation will use the assessment framework adopted by the State of Idaho, the World-Class Instructional Design and Assessment's (WIDA) Assessing Comprehension and Communication in English State to State for English Language Learners (ACCESS). DAI will initially administer the WIDA-ACCESS Placement Test (W–APT), an English language proficiency "screener" test given to incoming students who may be designated as English language learners. It assists educators with programmatic placement decisions such as identification and placement of ELLs."[18] The W-APT screener for English proficiency will take place in the first 30 days of school.

Placement

For students Classified as Non-English or Limited English Proficient who are coded as non-English or limited English proficient as a result of the initial assessment, the following steps will be completed within the mandated timelines:

1. Classify students who are eligible for English Language Learner (ELL) services as Non-English or Limited English proficient. The students eligible for ELL services.
2. Prepare a Parent Notification Letter if a student qualifies for ELL services. Once the parent receives the letter, they may choose to receive ELL instructional services. If the parent or guardian refuses ELL instructional services, the school will meet with the parent or guardian to ensure that the parent or guardian understands what is being waived. Parents or guardians may only waive ELL instructional services – not testing. The school will document the parent conference and place a copy of the waiver in the cumulative student folder.
3. As stated above, students will be evaluated with the World-Class Instructional Design and Assessment's Assessing Comprehension and Communication in English State to State for English Language Learners (WIDA-ACCESS) assessment, which is based on a six tier scoring system. Students will receive an English Language Proficiency Level on a scale of 1-6 (1-Entering, 2-Emerging, 3-Developing, 4-Expanding, 5-Bridging, 6-Reaching). Teachers will utilize the score report to better differentiate instruction to meet the needs of each student.
4. Once students are assessed, the Principal will ensure that eligible students are provided appropriate ELL services. In addition, Principals or designees will ensure that ELL students and their parents or guardians are aware of school activities and other

[18] WIDA. Assess. *Kindergarten W-APT.* [website] URL: https://wida.wisc.edu/assess/kwapt; last accessed June 2019.

opportunities at the school in a language they understand. Students who are eligible for ELL services will receive these services until it is determined, through reevaluation procedures, that they possess adequate English language and academic skills to allow them to perform satisfactorily in general education classes without special instructional considerations.

Staffing

DAI's ELL services may be coordinated through a teacher with an ENL-7126 endorsement who will, at least initially, be administering ELL identification and support services in conjunction with his or her role as a classroom teacher. DAI's Board and Principal may also decide to contract for these services through duly-certified, ENL-7126 endorsed contractors that administer ELL assessments and support ongoing monitoring of ELL students.

DAI will offer an evidenced-based ELL Program such as the Content-Based Model. The goals of all of the program will be to: (1) help ELL students achieve comprehension, speaking, reading, and writing competence in the English language; (2) enable students to achieve and maintain grade level status; and (3) enable students to meet graduation standards. The Sheltered Content-Based ESL Instruction Model is an integrated content language approach. The goal of the Sheltered Content-Based Instruction Model is for ELL students to develop English language skills in content classes.[19]

The goal of the content-based approach is the acquisition of English and grade level academics so that the ELL student can succeed in an English-only classroom. This approach has the following features:

- All instruction is done in English;
- When possible, the child's primary language is used to clarify instruction;
- English is taught through reading, language arts, math, science, and social studies;
- A strong English language development (ELD) component is included in every lesson;
- The acquisition of English takes place in a structured, non-threatening environment in which students feel comfortable taking risks; and
- Controlled vocabulary is included while students gradually acquire the necessary language skills to succeed academically and become lifelong learners.

Monitoring

DAI will progress monitor ELL students as with all students on a regular basis using data to track their progress. In addition, ELL students will be reassessed every year to determine whether the pupil's proficiency in English is fluent and whether they are able to succeed in courses of study that are taught only in English. The school will monitor all reclassified students for a minimum of two years after they have met language proficiency.

[19] Dong, Yu Ren. (2005). Educating language learners: getting at the content. Educational Leadership, 62(4), Retrieved from http://www.ascd.org/publications/educational-leadership/dec04/vol62/num04/Getting-at-the-Content.aspx; last accessed June 2019.

The Principal will ensure appropriate policies are followed. As with non-ELL students, ELL students may be retained. In the case of ELL students, the Principal will ensure that ELL students are not retained based solely on the student's inability to perform in the English language. In making a determination of whether an ELL student should be retained, the Principal will ensure that careful consideration is given to the range of services and options available prior to making the decision to retain a student. Response to Instruction (RtI) data should be used to assist the principal in making retention decisions regarding an ELL student.

Adjustments or changes to the student's educational program may be necessary in order to avoid retention. As with non-ELL students, retention concerns should be ongoing throughout the year. If the decision is made to retain an ELL student, the principal will ensure that the student receives different services during the year following the retention.

ELL students be reassessed every year to determine whether the pupil's proficiency in English is fluent and they are able to succeed in courses of study that are taught only in English. The student must be given the test Accessing Comprehension and Communication in English State-to-State for English Language Learners (ACCESS for ELLs) every year until the student exits the ELL program. Parents or guardians of LEP children do not have the option of withdrawing their student from participating in the ACCESS for ELLs.

DAI may reclassify an ELL student only if the school administers the ACCESS for ELLs to assess the pupil's proficiency to comprehend, speak, read, and write English. Afterward, the pupil will obtain a score on the examination that is equal to or greater than a score for a person who is fluent in speaking, reading and writing English, as established by the publisher of the examination.

The school will monitor any students reclassified as English proficient who have not yet met exit criteria. The school will ensure that reclassified students are appropriately placed in general education classes and DAI will monitor a student reclassified as fluent-English proficient, but who has not yet met exit criteria, for no less than two years. The purpose of this monitoring is to ensure that the students have no grades below a "C" in any academic class and are no longer in need of language acquisition assistance.

The monitoring from the school will include periodic contact with the student's teacher(s) to ascertain student progress. The school will also review the student's report card annually to review the student's attendance, academic and citizenship grades. To be considered academically successful, a student should have no grades below a "C" in English, reading, math, science, or social studies.

The ELL monitoring process information should be included in any RtI interventions that are determined by the school. Specific consideration for language proficiency must be taken into consideration in planning specific interventions for the student. If, as a result of monitoring, evidence indicates that the student is not successful in English-only classes and needs further language acquisition assistance, the school will administer the initial assessment test to

ascertain the student's current English proficiency. A meeting will be held with the student's parents or guardians and the student will be considered for reinstatement into the ELL program, into an academic remediation program, or the student will remain in English-only classes. The school will continue to monitor the student for language and academic progress. If the student is determined to be academically unsuccessful, the school and the appropriate teachers will seek out other services for the student in order to address any academic deficiencies. Prior to making any changes, the principal or designee will meet with the parents or guardians to discuss the recommended changes.

Parental Involvement
Principals or designees will ensure that ELL students and their parents or guardian are aware of school activities and other opportunities at the school in a language they understand. Parent outreach for ELL families will conducted in a manner and format that is meaningful and accessible to the parent. In some instances, for example, written documents may be inaccessible to parents with limited literacy in their primary home language. Such families will need to be contacted verbally at a time and in a place that is conducive to their involvement and attention (e.g. at home versus when they're working and could face discipline for using a personal phone).

Homeless/Migrant
Identification
DAI will identify students and families in need of homeless/migrant services for new students by including a space for identifying homeless/migrant student status in the initial enrollment of a student. Additionally, because students can become children in transition at any point, DAI will identify existing students in need of homeless/migrant student services through counselor/teacher referrals and proactive communications with parents and families about available supports. Misidentification will be avoided by making sure staff involved in registration of new students understand the differences between families have a difficult time pulling together all materials required and/or requested for enrollment: birth certificates, immunization records, previous school records, home address etc., and those families who lack this information due to their homeless/migrant status.

To assist in identification, DAI will follow to the broadly defined definition of homeless as set forth in Section 330 of the Public Health Service Act (42 U.S.C., 254b), Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009 (P.L. 111-22, Section 1003), remaining cognizant of the evolving and complex nature of defining homelessness.

The term "homeless" or "homeless individual" includes:

- An individual who lacks a fixed, regular, adequate nighttime residence;
- An individual who has primary nighttime residence in a supervised, publicly or privately operated shelter for the accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill);

- An individual who sleeps in a public or private place not designated for, or ordinarily used as, a regular sleeping accommodation for human beings (e.g., cars, parks, motels, campgrounds, undeveloped state or federal lands);
- Children living with a parent in a domestic violence shelter;
- An individual who is, out of necessity, living with relatives or friends due to lack of housing;
- Runaway children (under 18 years of age) and children and youths who have been abandoned or forced out of the home by parents or other caretakers, or such youth (between 1 and 20 years of age) who may still be eligible for educational services who: temporarily reside in shelters awaiting assistance from social service agencies; live alone on the street or move from place to place between family members, friends, or acquaintances; and children of migrant families who lack adequate housing.

Gifted/Talented

Identification

In accordance with Idaho Code §33-2001, gifted/talented students are 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."[20]

DAI will identify and meet the needs of gifted and talented students, in accordance with Idaho Code §33-2003. In determining the eligibility of a pupil for the gifted and talented program of instruction, the GATE Team (comprised of classroom relevant teachers and administration) may use alternative assessment procedures for a pupil from another culture, a pupil who is environmentally or economically deprived or a pupil who has a disability. The conclusions of the GATE Team concerning the eligibility of the pupil for the gifted and talented program of instruction will be based upon an assessment of the talent, cognitive abilities or academic achievement of the pupil. Unless the pupil's individualized educational program otherwise provides, a pupil who is gifted and talented must participate in not less than 150 minutes of differentiated educational activities each week during the school year.

A range of service delivery options will be available to meet each gifted and talented student's special needs based on the student's Gifted and Talented Educational Plan (GTEP) and will be provided with administrative support to assure adequate funds for materials and professional development.

Plan Development

Once a student has been referred to the gifted and talented program, the gifted and talented teacher will notify the student's parent, teachers, and school psychologist. The school psychologist at DAI will fill out the appropriate forms and send home a written notice to inform the parents for the initial assessment for the gifted and talented program. Parents will sign

[20] Idaho Code §33-2001.

consent to evaluate. The School Psychologist will administer appropriate cognitive assessments. The Gifted and Talented Eligibility Statement form will be used to determine eligibility in the gifted and talented program.

Parents will be considered partners with the schools in developing, reviewing, and revising the gifted plan for their child. The role of parents in developing such plans will include:

- Providing critical information regarding the strengths of their child;
- Expressing their concerns for enhancing the education of their child;
- Participating in discussions about the child's needs;

The team considers the following during development, review, and revision of the gifted plan:

- The strengths of the student and the needs resulting from the student's giftedness
- The results of recent evaluations, including class work and state or district assessments
- In the case of an ELL student the language needs of the student in relation the gifted plan.
- The plan for each student will be individualized, measurable, and observable.

Implementation

The gifted plan will be implemented immediately following the meeting and will be made accessible to each of the student's teachers who are responsible for the implementation. Each teacher of the student will be notified of specific responsibilities related to implementing the student's gifted plan.

Services and Instructional Strategies

The school will offer various services to meet the needs of the gifted and talented student. These services may include but are not limited to: Specialized gifted and talented courses, Acceleration, Ability grouping, Modifications of content through differentiated curriculum, Career exploration and goal setting integrated into the curriculum, Curriculum compacting, Enrichment, Social skills development and/or counseling, and Real-world immersion activities (i.e. as science and social studies fairs, exhibits, academic competitions, mentoring).

Curriculum will be vertically and horizontally enriching, providing those students who have mastered the grade-level Idaho Content Standards and DAI-offered opportunities for acceleration. Curriculum for gifted and talented students will include a wealth of opportunities for extended learning beyond the classroom.

Evaluations

The team shall consider the strengths of the student and needs resulting from the student's giftedness and the results of recent evaluations, including class work and state assessments. In the case of a student with limited English proficiency, the language needs of the student as they relate to the IEP, will be considered when reviewing and revising the plan.

DAI will offer various services to meet the needs of the gifted and talented student based on the gifted plan. These services may include but are not limited to:

- Elementary School (K-5) Gifted Program -
    - Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and social studies fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum);
    - Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum); and
    - Ability grouping: (e.g. specialized gifted and talented courses, real social skills development and/or counseling).

- Middle School (6-8) Gifted Program - DAI will offer accelerated (gifted) content area courses (Mathematics, Science, Social Studies, and/or English Language Arts) and/or State-approved middle school gifted elective courses. All of the students in the gifted and talented course are eligible for gifted and talented services and the teacher is endorsed to teach gifted and talented students or on an approved waiver to complete the gifted and talented endorsement.

Enrichment Opportunities

Similar to the gifted plan, there will be a variety of enrichment opportunities that will be available to students performing at or above grade level as part of DAI's comprehensive strategy to ensure that all students are making accelerated academic progress these include but are not limited to:

- Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and social studies fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum);
- Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum); and
- Ability grouping: (e.g. specialized gifted and talented courses, real social skills development and/or counseling).
- Extended Learning Opportunities- Afterschool enrichment programs and clubs. All students will be included in the data driven instruction model (Data Methods and Systems) to ensure that all students are making academic progress even those who are performing at or above grade level.

Promotion/Retention

DAI is also committed to ensuring fair and equitable promotion and retention of our students in alignment with DAI's mission. Using real-time data from frequent assessment results, DAI will provide the necessary individual, classroom and/or school-wide intervention programs. The Data Team and along with teacher referrals will determine which students may need additional targeted interventions which include: requiring students to attend specific targeted tutoring, Early-Bird, during school, or afterschool; proving for supplemental intervention programs and support within the respective reading, math, science classrooms through academic coaching, lesson modeling, computerized intervention programs and pull out services (as needed).

Parents of students who are in need of interventions (individual or other) will be notified throughout the process. The teachers will work with students and families to accommodate schedules. Additionally, the Data Team will identify students that may need to be part of the RtI (Response to Intervention) process. If the Data Team and Classroom teacher should identify a struggling student that may be in need of retention, they will be referred to Pupil Promotion/Retention Team by the end of the first semester.

The Pupil Promotion/Retention Team may be comprised of a member of the administrative team, current teacher, next year's teacher, and special education teacher (if applicable). Administration is responsible for identifying the appropriate members of the team. The school will identify benchmarks and procedures for promotion at each grade level. Students who meet or exceed the benchmarks determined by the school will be promoted to the next grade level. Data to be considered may include attendance, state assessments, school and curriculum-based assessments, classroom observations, parent and teacher surveys, and classroom grades and work samples.

The Pupil Promotion/Retention Team will review the data and make a recommendation or promotion to the next grade level or retention. The Team will then meet with the parent/guardian to discuss the data, recommendation, and social emotional concerns, and the options for their student. The team along with the parent will make a decision to promote or retain the student. DAI will comply with State and Federal laws regarding the students with disabilities and IDEA in the case of students who are twice exceptions, e.g. they are both Gifted and Talented and they have an IEP.

Professional Development Plan

DAI understands the importance of ensuring a high quality, committed, and consistent staff of teachers and leaders. The school develops and reviews specific personnel policies to support its goals and to ensure fairness and compliance with state and federal law.

DAI will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering on-site trainings. Staff members will participate in school- initiated and other relevant and necessary workshops for professional development. A member of the administrative team will oversee, coordinate, assist and monitor the staff development process. Teachers will attend relevant local and national conferences and serve as trainer to the remainder of the staff upon return to DAI. The professional development offered to teachers will align with student achievement data, curriculum, instructional personnel needs, School Improvement Plans, and annual school reports.

Prior to the opening of DAI, professional development will be offered. At that time the administrator and identified school leaders (department chairs) will receive professional development in DAI's Mission, Vision, and in fundamental components of Arts Integration. This training will be led by Doral Academy, Inc. instructional leaders. In the train the trainer model, the Nevada instructional leaders will be able to prove training and support to the teaching

faculty at DAI. All DAI faculty will receive one to two weeks (at minimum) of on-site professional development prior to the inaugural school year.

Each school year, DAI's Principal will assess the faculty's professional development needs by surveying faculty and reviewing data for trends that could be addressed through appropriate professional development. This survey will be used to prioritize on-going professional development. DAI will provide, at minimum, professional development training in the following areas: DAI's Mission and Vision; Opening of School Procedures; Data Driven Decision Making; Positive Behavioral Support; Serving Exceptional and Educationally Disadvantaged Students; Differentiated Instruction; Technology; and Safety and Security. Additionally, the staff will receive professional development on applicable State, Federal, and all applicable laws, regulations, and policies. (Safety Training, OSHA Requirements, Blood Borne Pathogens, etc).

DAI will provide annual professional development to aide in the curriculum delivery, specific to the school's mission and vision including, but not limited to:

- Arts-Integration Instructional Methods – DAI will receive PD on two school-wide Arts Instructional Strategies/Methods annually. The school only selects two methods so they will be taught with validity[21], and students can learn to produce the outcomes of the methods comprehensively.

Table 5: Professional Development Sample		
Year of Operation	**Genre**	**Strategies**
Year One	Drama	Tableau On/Off
Year Two	Drama	ABA Actor's Toolbox
Year Three	Dance	Moving Through Math-Grouping Game and Patterns

  Additionally, teachers will receive professional development on other instructional best practices based on their needs identified in the survey, including but not limited to: Scaffolding, Inquiry Based Learning, Project Based Learning, Cooperative Learning, Teacher Modeling, Group Practice, Modeled Writing, Learning Strategies, etc.
- Opening of Schools Policies and Procedures Training – All personnel will participate in policy and procedures training (conducted by Principal and Lead Staff);
- DAI's Mission, Vision, and Educational Philosophy
- Data-Driven Decision Making – An interactive workshop to teach faculty how to use specific performance indicators to identify student needs and target instruction;
- Curriculum Implementation by Grade Level/Subject/Specialty – Teachers will participate in school-wide and grade level/department training throughout the school year related

[21] Phased implementation of Arts Integration strategies also allows for the development of in-house expertise by DAI faculty. For instance, if a trainer from the Kennedy Center trains faculty members in Tableau and On/Off in Year One, a trained faculty member can train any new faculty hires in these strategies in Year Two, while also learning two new strategies taught by an outside Arts Integration expert.

to curriculum implementation. These include but are not limited to: Horizontal and Vertical Team Planning, Textbook Training, etc.

- Serving Exceptional and Educationally Disadvantaged Students – Teachers will receive professional development on working with students with special needs. This will include, but is not limited to: Differentiated Instruction for at risk learners, Special Education Students, and Gifted and Talented Students; Sheltered Instruction Content Model for ELL students. WIDA Screening and Assessment professional development will be provided to identify faculty. Based on the student population and faculty survey, additional training may be offered to support the needs of the student body;
- Differentiated Instruction – Teaches faculty how to differentiate and individualize instruction in order to create effective targeted instructional lesson and tutoring to increase student achievement and maximize instructional time;
- Positive Behavioral Support – This training will ensure that teachers have the necessary strategies to implement classroom intervention strategies (Tier 1-3);
- Check-In/Check-Out – This training will instruct teachers on the Check-In/Check-Out Mentoring System.
- Technology – Teachers will participate in hands-on technology workshops to learn how to intergrade technology into the classroom. The purpose is to ensure schools are growing with technology to ensure students and teachers are prepared for the expectations of the 21st century and national technology standards; and
- Safety and Security – This training will include: daily safety procedures, the school safety plan, and Crisis Prevention Institute trainings (CPI). Safety trainings, such as blood borne pathogens, will be offered to meet Occupational Safety and Health Administration (OSHA) requirements.

Evaluations

In line with best practices, the Principal should administer reviews/evaluations of teachers and staff members annually. The Principal will help each staff member to develop a professional development plan and set goals that support the school's mission and goals. The Principal is expected to facilitate best practices in teacher development, such as establishing procedures and expectations for peer and coaching observations as well as developing mentoring teams.

The Principal will also observe the staff in day-to-day activities to determine strengths and areas of deficiency, and if necessary, the appropriate remediation. The Principal's goal is to provide regular performance feedback to staff members including but not limited to, constructive remediation, problem-solving support, and recognition for exemplary performance, formal and informal evaluations.

All employees will be observed on an ongoing basis by the Principal, using both formal and informal observations. Formal observations may include a pre-observation conference as well as a post-observation feedback session. First and second year teachers will have at least two formal observations per year. All teachers will have at least one formal observation per year.

Formal Evaluations - First Year Employees, Alternative Teacher Certification and Induction
For all first year employees and any teacher who has not received their Professional Teacher Certification, there shall be two formal reviews (one in each semester of the school year). This includes employees in the state's Alternative Teacher Licensure program. The formal evaluation will review the employee's self-assessment, job description, areas of responsibility, areas of improvement, progress toward goals, and plan for improvement. The formal evaluation shall include a plan for completing the requirement for the Professional Teacher Certification (if appropriate) and documenting any concerns. At that time, the Principal may inform the employee and report to the Board of Directors whether the school intends to continue employment for the subsequent school year. Results of the formal evaluation will be put in writing, signed by employee and Principal, and copies placed in the employee's professional portfolio and personnel file.

Formal Evaluations - Returning Employees
For returning staff members, there shall be a minimum of one formal review six months after the start of the year. The formal evaluation will provide an opportunity to review progress toward the employee's professional development plan and goals. In addition, the employee may provide feedback to the Principal on the Principal's job performance. At that time, the Principal may inform the employee and report to the Board of Directors whether the school intends to continue employment for the subsequent school year. Results of the formal evaluation will be put in writing, signed by employee and Principal, and copies placed in the employee's personal portfolio and employment file.

Response to Observations and Evaluation Findings
All employees shall have the right to make written objections to the observations or review finding within one week of receipt by stating areas of disagreement. These objections will be attached to the observation and/or evaluation and kept in the employee's personnel file.

II. FINANCIAL & FACILITIES PLANS

Fiscal Philosophy and Spending Priorities

The Doral Academy of Idaho (DAI) governing board will oversee all aspects of the fiscal management of the school and are dedicated to providing an enhanced educational experience by furnishing students with an academically challenging and personally meaningful learning environment with an emphasis on arts integration. The charter school budget will serve as the financial plan of operation for the charter school and will include estimates and purpose of expenditures for a given period and the proposed means of financing the estimated expenditures. DAI will provide the budget and budget documents in accordance with the rules and regulations as specified by the Idaho Department of Education on an annual basis.

The governing body recognizes its responsibility to establish an unreserved fund balance in an amount sufficient to:

- Protect the charter school from unnecessary borrowing in order to meet cash- flow needs;
- Provide prudent reserves to meet unexpected emergencies and protect against catastrophic events;
- Meet the uncertainties of state and federal funding; and
- Help ensure a charter school credit rating that would qualify the charter school for lower interest costs.

In determining an appropriate unreserved fund balance, the governing body will consider a variety of factors with potential impact on the charter school's budget including:

- The predictability and volatility of its expenditures;
- The availability of resources in other funds;
- The potential drain upon general fund resources from other funds;
- Liquidity; and
- Designations

Doral Academy of Idaho has presented a fiscally conservative budget for their first 3 years of operation as well as a breakeven budget for their first year of operation in case student enrollment comes in lower than expected. Doral Academy of Idaho's largest fixed costs are salaries & benefits with categories such as educational program items, technology, furniture, and supplies fluctuating with student enrollment. This is no surprise as the largest fixed cost is the most important; in order to successfully implement an educational program, being able to hire/retain dedicated school staff is top priority.

Utilizing Academica's standing relationship with the lending institution Vectra Bank will allow Doral Academy of Idaho to lease all their furniture, fixtures, equipment, and curriculum in the first year of the school over a 48-month period. The lease will include a 5% residual purchase option at the end of the 48 months or an early purchase option in the 45th month for a 6% residual. The proposed campus will likely enter into this lease agreement in their first year of

operation. Doral Academy of Idaho budgets $1,000 per student to outfit the entire school in its first year of operation at a 5% interest rate over 4 years. The budget reflects projected FFE costs for the first three years of operation, these projected totals are divided into the three equipment categories: curriculum, technology, & furniture/fixtures.

Transportation and Food Service Plans

Doral Academy of Idaho will look to provide transportation to and from school and will contract out the service in its first few years. The budget has been based on rates given by Brown Bus Company (BBC), a well-established bus transportation company that provides school bus transportation to various Idaho schools. The budget reflects the transportation allowance of 60% of the projected transportation expenses. The transportation expenses are assumed at $325 per route per day, for 180 school days; utilizing one route for the first two years of operation, increasing to two routes in the third year of operation. Once established, the Doral Academy of Idaho governing board will seek the appropriate bids for a bus transportation provider in compliance with Idaho Code.

As outlined in *Section IV. Student Demand and Primary Attendance Area* of this application, Doral Academy of Idaho projects that 37% of the student population will qualify for free and reduced lunch. Standard kitchen equipment is factored into the amount of the anticipated building space and may include up to an oven, warming cabinet, double door refrigerator, and single door freezer. These items are included in the schools anticipated FFE lease mentioned in more detail in the subsection above. Additional start-up expenses may include food thermometers, a prep table, oven mitts, single use gloves, and other kitchen supplies. Administrative costs are minimal and may include a date-stamp, envelopes, and mailing stamps. The school is looking into several options on how best implement the National School Lunch Program (NSLP) for its campus. The school has reached out to other charter schools in the area on what they are doing for to provide lunches. Based on our conversations with these schools, the school plans to contact local restaurants recommended by other charters schools to provide lunches that meet the requirements of the NSLP. As the school grows, the school is looking to purchase a facility with a kitchen and looking into implementing the program in house eventually. The school will administer the application process for all free and reduced-price meals and will submit claims for reimbursement to the state. The budget assumes that meals will be paid for by students not eligible for these programs. The amount of $6,000 per year has been budgeted in Year 1 – 3 for any potential overages or one-time costs associated with providing food services. The operating costs associated with this expense are based on experience with similarly sized schools in the Boise area.

Financial Management and Monitoring Plan

As outlined in *Section III. Board Capacity and Governance Structure* of this application, the governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The auditors, accountants, and educational management company retained by the governing board, will work as a team to develop financial statements and accounting reporting templates to ensure compliance with the state and federal reporting guidelines.

As outlined in *Section V. School Leadership & Management* of this application, Doral Academy of Idaho will contract with Academica Idaho, an Educational Service Provider whose services to Doral Academy of Idaho shall include, but may not be limited to, the following:

- Identification, design, and procurement of facilities and equipment
- Staffing recommendations and human resource coordination
- Regulatory compliance and state reporting
- Legal and corporate upkeep
- Public relations and marketing
- The maintenance of the books and records of the charter school
- Bookkeeping, budgeting and financial forecasting

For the services of Academica Idaho, an annual fee per student as structured below will be charged to Doral Academy of Idaho. As outlined in *Section IV. Student Demand and Primary Attendance Area* of this application, an early relationship with Academica Idaho allows Doral Academy of Idaho to have some financial flexibility during its initial growth phase. The budget presented includes an Academica Fee schedule of the following:

Student Count		Fee	
175 or Less	$	-	
176 - 225	$	10,000.00	Flat Fee
226 - 325	$	75.00	per student
326 - 425	$	150.00	per student
426 - 525	$	225.00	per student
526 - 624	$	300.00	per student
625 or more	$	450.00	per student

Academica will also provide Doral Academy of Idaho with a $25,000 start-up loan for operational expenses in their first year of operation. This loan will be a non-recourse loan at an interest rate of 5% over 36 months. There will also not be any prepayment penalty on the loan.

Under the supervision of the Board Treasurer, and in conjunction with the school's audit firm, Academica Idaho will be responsible for the school's bookkeeping, financial reporting, and financial liability. The school principal will supervise the day-to-day cash collections at the school. The governing body, through the Board Treasurer, will receive and accept financial reports that include monthly bank statement reconciliations, estimates of expenditures for the general fund in comparison to budget appropriations, actual receipts in comparison to budget estimates and the charter school's overall cash condition. Supplementary reports on other funds or accounts will be furnished upon request of the governing body or administrator. Appropriate staff will be available at any governing body meeting, upon the governing body's request, to respond to questions and to present current financial information. The

administrator will notify the governing body at any time of substantial deviations in the anticipated revenues and/or expenditures.

The campus principal will be responsible for assuring budget allocations are observed and the total expenditures do not exceed the amount allocated in the budget. The governing board will look to outsource payroll processes to a 3rd party vendor. Preparation of payroll, including time schedules and payroll periods, will be done in accordance with each employee's agreement with the governing body. Employee health, accident, dental, and other types of insurance will be provided as outlined in the agreements. Mandatory payroll deductions will be withheld as required by state and federal law. The person designated to draw all orders for the payment of monies belonging to the charter school is the principal, and the principal will work closely with Academica Idaho. All claims for payment from charter school funds are processed by Academica Idaho in conformance with charter school procedures. Payments are authorized against invoices properly supported by approved purchase orders with properly submitted vouchers approved by the governing body.

Doral Academy of Idaho intends to adopt and comply with the Idaho Financial Accounting Reporting Management System (IFARMS), developed by the Idaho Department of Education. The function of charter school purchasing is to serve the educational program by providing the necessary supplies, equipment, and services. The governing body will appoint the purchasing agent. He/She will be responsible for developing and administering the charter school's purchasing program. Any officer or member of the governing body may incur no obligation unless that expenditure has been authorized in the budget or by governing body action and/or governing body policy. In all cases, calling for the expenditure of charter school money, except payrolls, a requisition and purchase order system must be used. Unless authorized by the administrator, no purchase will be authorized unless covered by an approved purchase order. No bills will be approved for payment unless purchases were made on approved orders. The administrator will review bills due and payable for the purchase of supplies and services to determine if they are within budget amounts. After appropriate administrative review, the administrator will direct payment of the just claims against the charter school. The administrator is responsible for the accuracy of all bills and vouchers.

As mentioned in *Section I. Educational Program* of this application, Doral Academy of Idaho ("Licensee") will enter into a Trademark License Agreement with Doral Academy, Inc. ("Licensor"). Doral Academy, Inc. grants Doral Academy of Idaho a non-exclusive, non-transferable, royalty-free license to use the trademark in connection with the development and establishment of the school of Doral Academy of Idaho in the State of Idaho. The budget reflects this agreement as the Doral Academy, Inc. Affiliation fee. This fee is 1% of state unrestricted revenue, half of which goes back to the school for Professional Development use and the other half going to Doral Academy, Inc. for its collaboration, accreditation, and support. The budget reflects only the Professional Development half of the expense in Doral Academy of Idaho's first few years of operation. The half of the fee that goes to Doral Academy, Inc. will be charged once Doral Academy of Idaho is able to financially sustain its cost. Please see *Appendix F8 – District Membership Agreement* for a draft of Doral's Affiliation Agreement.

Furthermore, DAI will evaluate its affiliation with Doral Academy, Inc. in three stages:

1. Beginning of school year – Goals will be established in alignment with the executed contract between Doral Academy of Idaho and Doral Academy, Inc.
2. Middle of school year - The Board will evaluate the services provided based on a rubric covering topics such as, but not limited to: Professional Development, Curriculum Support, Culture Training, Best Practices, etc.
3. End of school year – Final round of evaluations

Facilities Plan

DAI is continuing to actively search for facilities options within its target community. Based on its proposed enrollment configuration, the school's eventual facility need is no more than 40,000 square feet at full buildout by year 5 of the charter. It is important to note that DAI's enrollment plans assume a slow growth model starting approximately 200 students and expands by a grade per year with some modest adding of additional sections in existing grades.

The primary location DAI has identified is the Compass Charter School Campus located at 2511 W. Cherry Lane. The facility is currently for sale. The primary location is within DAI's target community and will meet the school's needs as it grows year over year until it reaches capacity. Listing price for the facility is $4,500,000. The purchase prices also includes all FF&E equipment wherein the school would only need to purchase a limited amount of furniture and equipment upon moving in.

The primary facility includes a 40,000 sf campus on 3.5 acres, which includes 24 classrooms (already outfitted with FFE), stand alone gym, cafeteria, commercial kitchen and outdoor playground. The primary location also includes large auditorium area (previously church sanctuary) wherein should the school need to build-out additional classrooms over time they would have the ability to do so. The primary location is also move-in ready related to municipal approvals needed to operate a public charter school. The school overtime will look to make tenant improvements primarily to the exterior of the facility to make it more inviting to school stakeholders.

If the school is unable to acquire the primary location the school can readily make do with a facility between 11,000 and 15,000 square feet during its first two years of operation. The school is in discussions with Legacy Life Church located at 1830 N. Linder Road, Meridian. The secondary location is located within the school's target community. The secondary location is located on approximately 12 acres, with 11 classrooms, administration offices, cafeteria area, commercial kitchen, a large outdoor playground area and large parking area. The school would work with its architect to ensure the building meets all facility codes necessary to operate a public charter school.

For further information regarding these facilities, please see *Appendix A5 - Facility Options*.

The school is in discussions with groups such as Hawkins Companies, Turner Capital, and Building Hope among others, (see *Appendix F6 – Performance & Hawkins Letter of Support* for more information) about purchasing a facility and creating a long term lease with a purchase option that includes a stair step rent schedule that would allow the school to build up enrollment until it can afford a full rent payment. DAI is also currently in preliminary discussions with leaders from both sites which are subject to further development upon receipt of evidence of an approved charter. Until a charter is granted, a specific arrangement cannot be established. At this time, however, the founding team has begun steps that will facilitate the process once a charter has been awarded. Additionally, our preliminary exploration indicates that rent costs at either facility fall within the projected cost per square foot that we used to generate our budget assumptions for the facilities line item. For an example of what DAI's future lease agreement will entail, please see *Appendix F9 – Lease Agreement Example*.

III. BOARD CAPACITY AND GOVERNANCE STRUCTURE

Governance Structure

The Doral Academy of Idaho (DAI) is organized exclusively for educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code. The governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The policies, procedures, powers, and duties by which the board will operate, including specific member powers, are detailed in the attached bylaws.

Board members will serve five-year terms, and board members may serve no more than two terms. Terms will be staggered so that no more than half of the board will be up for election in any one year, unless a vacancy needs to be filled.

The officers of the governing board will include a chair, vice chair, secretary, treasurer, and such other officers as the board will deem necessary to elect. The board will elect and appoint all officers at the annual meeting of the board. Officers will serve a one-year term and may serve consecutive terms in any office. The officer responsibilities are as follows:

- Board Chair – The chair will preside at all meetings of the board. The chair will possess the power to sign all certificates, contracts, or other instruments of the school that are approved by the board.
- Vice Chair - In the absence of the chair, or in the event of the chair's disability, inability, or refusal to act, the vice chair will perform all of the duties of the chair and will have all of the powers of the chair. The vice chair will have such other powers and perform such other duties as may be prescribed from time to time by the board or by the chair.
- Secretary- The secretary will keep the minutes of the board with the time and place of holding, whether regular or special and if special, how authorized, the notice thereof given, the name or names of those present at the board meetings and the proceedings thereof. The Secretary will give notice of all the meetings of the board required by law.
- Treasurer – The treasurer will have oversight responsibility and adequate and correct accounts of the properties and business transactions of the school, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses. The books of account will at all times be open to inspection by any board member. The treasurer will be charged with safeguarding the assets of school and he or she will sign financial documents on behalf of the school in accordance with the established policies of the school. He or she will have such other powers and perform such other duties as may be prescribed by the board from time to time.

The board will be composed of between five and nine members, as set or adjusted by the governing board. The bylaws state that the board will seek to maintain a membership that is representative of the community and possesses the breadth of knowledge and experience to effectively support and direct the operation of the school. To support this, the board will endeavor to maintain a membership which includes:

- At least two parents of enrolled students;

- An active or retired licensed educator;
- An individual with expertise in the areas of Accounting and/or Finance; and,
- An individual with expertise in the areas of Law and/or Human resources.

Any board member of the school may be removed by two-thirds of the members then in office, excluding the member at issue, whenever such removal would serve the best interests of the school. Any member may resign at any time and their resignation will be effective upon receipt by the Chair of a written communication.

Duties of Governing Board

As mentioned previously, the policies, procedures, powers, and duties by which the board will operate are detailed in the attached bylaws. A brief overview of those powers include:

- Ratify the school's mission and vision statements, and any modification thereof
- Establish and approve all major educational and operational policies
- Develop and approve an annual budget and financial plan
- Approve any management, operational, and service contracts
- Exercise continual oversight of the charter school's operations
- Select an independent accountant to perform an annual audit, and review and approve the audit report
- Hire and supervise an administrator who will oversee the day-to-day operations of the charter school

Additionally, Board members will:

- Understand the approved curriculum and agree with the educational philosophy, discipline policy, and administrative structure of the school
- Attend PTO meetings or events to show support and encouragement for the school
- Attend a yearly board retreat where the goals of the board are defined, and a board self-evaluation will be conducted to critique the performance of the board during the past year
- Participate in professional development trainings
- Know and abide by the Idaho Open Meetings Law for open meetings

DAI's bylaws state that the board may create by resolution an Academic Committee, a Governance Committee, a Financial Committee and one or more other committees, which may exercise such authority in the management of the school as provided in such resolution or in the school bylaws. Each committee created will consist of at least one board member and will include key stakeholders from the school community.

Independent Support

In order to provide additional and independent assistance in legal as well as financial matters, DAI's Governing Board of Directors has engaged with preliminary discussion with several firms and businesses.

Two local firms, which are best known for providing small school financial audits, as well as small non-profits and governments in general, are:

Zwygart, John & Associates
16130 North Merchant way #120
Nampa, ID 83687

and

Quest CPAs, PLLC
11501 Highway 95
Payette, ID 83661

These two firms have solid reputations in their aforementioned industry and are considerably less expensive than larger firms in the area.

For legal representation, DAI's is pursuing discussions with the following:

Chris Yorason
Yorgason Law Offices, PLLC
6200 N Meeker Place
Boise, ID 83713

Kenneth L. Mallea
Mallea Law Office
78 S.W. 5th Avenue, Suite 1
Meridian, Idaho 83642-2923

and

Amy White
Anderson, Julian & Hull, LLP
250 South 5th Street, #700
Boise, ID 83702

The search for these third party service providers is critical to the school's success. DAI's Governing Board understands that compliance with all legal requirements, including open meeting law requirements, and providing assurance to all stakeholders that the financial affairs of the school are correctly and honestly administered is vital to the success and sustainability of their school.

School Principal

The school principal, hired by the board, will be responsible for all aspects of day-to-day administration of the school within the scope of operating policies, procedures, and budgetary functions as adopted and approved by the governing board. The principal will delegate duties to administrative support staff to ensure that daily operations, resources, policies, and

procedures are being implemented in accordance with the school's mission. The principal will hire, oversee, and evaluate faculty and staff. The principal will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school including procedures for curriculum and instruction, classroom management, faculty and staff evaluation, data analysis, testing, support services, parental communication, professional development, discipline, community outreach, oversight of facilities, and internal financial controls. The principal will report to the board on the school's operations and finances and is expected to communicate with the board as often as needed by the school or board members to ensure the school's operational needs are met. The governing board will conduct an evaluation of the school principal at mid-point through the year and at the end of the school year.

Teachers and Staff

All school personnel will report to the principal. The principal will determine the most appropriate staffing requirements and structure for the administrative office, who will report directly to the principal. Teachers and staff will be responsible for carrying out the procedures in their duties, activities, and interactions with students, teachers, and parents of the school.

Management Provider

DAI will be contracting with Academica as its Educational Service Provider, as detailed in *Section V. School Leadership & Management*. Academica's services are designed to allow the Principal and the Governing Board to focus on day-to-day school operations. Academica's services include, but are not limited to:

- Assist the Board in creating budgets and financial forecasts;
- Assist the Board in preparing applications for grant funds;
- Monitor and assure Compliance with all state reports;
- Assist the Board in locating and securing a school facility;
- Maintain the financial books of the school;
- Assist with systems development;
- At the Board's direction, prepare agendas and post notices of all board meetings;
- Assist the Board in identifying and retaining an employee leasing company;
- Provide human resources related services such as dispute resolution and contract preparation and review and;
- Assist the Board in renewing the School's charter.

Board Member Qualifications

Doral Academy of Idaho's founding board consists of a diverse group of people that meets the experience and skills necessary to successfully oversee the school. The various qualifications and expertise as well as names of the various Board Members are listed below:

Carolyn Baird (Proposed Board Chair)
Accounting, Real Estate
CPA, Realtor

Jade Millington
Financial Management, CFO

Educational Software, CFO

Jennifer St. John

Education, Curriculum & Instruction

State of Idaho Teaching Certificate, K-8, Board Certified Behavior Analyst

Krystine Archer

Stay At Home Mom/Homemaker, Real Estate

DOC Drawer/Funder, Escrow Officer

Miquelle Crosland

Real Estate Agent, Stay at Home Mom, Educator

Realtor, Business Owner, ParaProfessional and Teacher

Transition Plan

Once the charter is approved the board will transition to its role as a governing entity. The board anticipates to be a working board prior to the school opening and will both govern and assist with operations since minimal staff will be in place. With the mission and vision in the forefront, the board will do anything and everything to help get the school off the ground, from seeking facilities to developing programs.

Once a principal is identified and hired, all management duties will be transferred to him or her. The board may still assist the principal until the school opens, but the goal is to transition away from operations. Systems will be developed to allow the board to effectively provide appropriate oversight, and the board will shift its focus to strategic issues and building the school's reputation.

DAI structured its founding committee with the governing board role in mind. None of our members are seeking employment at the school, and we all joined the committee because we are passionate about the school's mission and believe we bring an expertise to ensure the school is successful and to perform as guardians of the "public trust."

Board Member Recruitment and Training

As mentioned before, the board strives to maintain a governing board that possesses the breadth of knowledge and experience to effectively support and direct the operation of the school, as well as is representative of the school community. The bylaws outline that the board shall seek to have the following minimum board competencies:

- At least two parents of enrolled students;
- An active or retired licensed educator;
- An individual with expertise in the areas of Accounting and/or Finance; and,
- An individual with expertise in the areas of Law and/or Human resources.

In order to further strengthen DAI's Governing Board, the aforementioned existing members have already met with several individuals from the community who have demonstrated committed interest in serving on the Board. While these conversations are still preliminary, each of the following individuals has agreed to have their contact information included in the petition:

Bruce Hobbs (Retired Brigham Young University - Idaho, Director of Relations & Services)
Email address: *hobbsb@byui.edu*
Phone number: 208-516-9033

Natalee Webb (School para-professional)
Email address: *natalee.webb622@gmail.com*
Phone number: 208-761-4632

Lindsay Arnett (Insurance claims adjuster)
Email address: *lindsay.a.arnett@gmail.com*
Phone number: 208-872-6838

As vacancies arise, the board will search for the best-qualified candidates, to maintain compliance with the board's bylaws. The board will develop a written job description of the qualifications and will advertise vacancies by posting the description on the school's website and through direct communication to the parents of all enrolled students. Individual board members will also circulate the notice within their professional communities. Additionally, the board will also seek opportunities to get the word out more broadly, including through free or inexpensive online advertising (e.g. via Idealist, Craigslist, etc.) and through referrals via education and civic minded non-profits in the region. We recognize, for example, that one excellent source of potential board members is the alumni corps of local nonprofits who have had board members rotate off of their boards.

Above all, we believe it is essential that we proactively recruit members who not only embrace our mission, but who also recognize that service on a charter school board involves a substantial commitment of time and social capital in service to a multi-million dollar organization with larger revenues and more complex legal and governance obligations than many other local non-profits. In our research, for example, we discovered that there are some charter schools in the Boise area with revenues on par with or greater than those of venerable non-profits such as the Boise Philharmonic and the Treasure Valley United Way[22, 23,24]. Consequently, we must treat board member recruitment every bit as seriously as we do staff recruitment.

[22] 2017 Audited Financial Statements, Idaho Arts Charter School, Inc. URL: http://www.idahoartscharter.org/UserFiles/Servers/Server_2621494/File/Financials/2017-2018/IACS%20Audited%20Financial%20Statements%20-%206-30-17.pdf. Accessed July 2019.
[23] ProPublica. Boise Philaharmonic Association. URL: http://www.idahoartscharter.org/UserFiles/Servers/Server_2621494/File/Financials/2017-2018/IACS%20Audited%20Financial%20Statements%20-%206-30-17.pdf. Accessed July 2019.
[24] 2018 and 2019 Audited Financial Statements, United Way of Treasure Valley, Inc. URL: https://www.unitedwaytv.org/sites/unitedwaytv.org/files/3-31-19%20UWTV%20Audit%20Financial%20Statements.pdf. Accessed July 2019.

Notice of the governing board's intentions to elect board members will be included in the agenda for that meeting and publicly announced in accordance with open meeting requirements. Newly created board member positions resulting from an increase in the number of board members comprising the board, and all vacancies occurring on the board for any reason, will be filled by a vote of the majority of the members in office at a duly organized meeting of the governing board.

In order to get a jump start on board governance training, members of the Governing Board for DAI attended the Charter Start! 101 in mid-July 2019. This two-day workshop is conducted by the Idaho State Department of Education's Office of School Choice and covers a variety of relevant topics. These include, but are not limited to, the following: ethical and effective board governance, the charter petition process, charter school financing in Idaho, and accountability, to name a few.

From January 2020 to August 2020, governing board members will participate in trainings that cover the following topics:

- Open Meetings Law (meeting notifications/agenda postings, quorum, meeting minutes, executive session)
- Public Records Request (communications publicly accessible, procedures for receiving and processing requests)
- Governing Board Roles, Ethics, and Pitfalls to Avoid
- Financial Oversight (reviewing financial statements, developing an annual budget, budget forecasting)
- School Leader Evaluation (state requirements, timeline)
- Academic Achievement (data-driven decisions, program assessment)

In future years when new members join the board, current board members will ensure proper onboarding. New members will receive a copy of the board bylaws, the charter application, the charter contract, the current budget, the strategic plan, the school leader evaluation tool, current academic data, and resources to cover open-meeting law, public records requests, and governing board roles and duties.

Each year starting after the first school year, the board will participate in a board retreat. The retreat will be a time to analyze ISAT and other assessment data from the prior year; set a board calendar and training schedule for the upcoming year; complete a board self-evaluation; draft/edit a strategic plan; and set measurable performance goals for the principal based upon his/her last year's performance review, student achievement and growth, school system health, and leadership. The board's training schedule will be developed based on the self-evaluation and any feedback received from the authorizer and stakeholders to determine topics the board may need a refreshment on. The board will also ensure ongoing training on applicable Idaho laws and policy issues affecting charter schools.

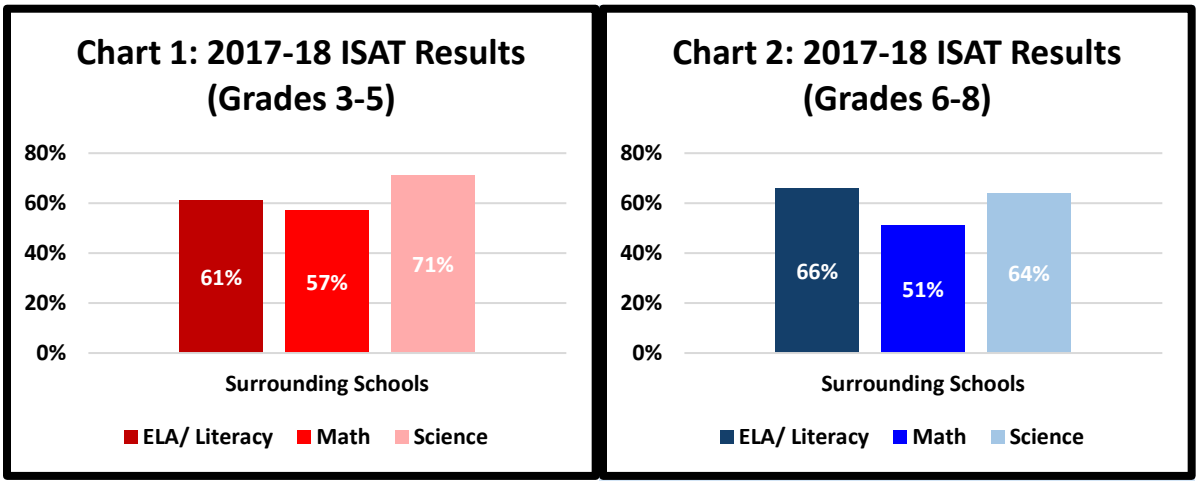
IV. STUDENT DEMAND AND PRIMARY ATTENDANCE AREA

Primary Attendance Area

As a public charter school, Doral Academy of Idaho (DAI) is open to all residents in the state of Idaho. However, DAI's target attendance area will most likely focus on our families and students in the Meridian, Idaho area. DAI's proposed school facility will be located at the Legacy Life Church located at 1830 North Linder Road, Meridian, ID 83646.

Student Demand

DAI believes the majority of their students will be those attending other public schools within a 5-mile radius of its proposed facility. To determine the likely demand for high quality education options, the school's proposed governing board has examined student academic achievement data from all Kindergarten-8th Grade public schools within a 5-mile radius of DAI's proposed facility site.[25] These findings show an anticipated student population encompassing variety of ethnicities as well as special needs. The current level of academic achievement from these surrounding schools is comparable to the rest of the country when examining high-stakes testing for similar grade levels (Please see **Chart 2**[26] and **3**[27] below). However, there still remains room for growth and improvement.



Additionally, the Meridian area has recently experienced an explosion of growth both in terms of geographical size as well as population. Previous data, from just last year, estimated Meridian's population growing to approximately 150,000 residents by the year 2040.[28]

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[25] Data was obtained through the Idaho State Department of Education, compiled, and then averaged to produce the findings shown above.

[26] Idaho State Department of Education. *Departments. Assessment and Accountability. Accountability.* URL: http://www.sde.idaho.gov/assessment/accountability/index.html; last accessed June 2019.

[27] Ibid.

[28] Talerico, Kate. "Experts thought Meridian would have 150,000 people by 2040. They don't think that now." *Idaho Statesman,* April 25, 2019. [website] URL: https://www.idahostatesman.com/news/local/community/west-ada/article229557244.html; last accessed June 2019.

However, within less than a year from the city's previous estimate, research now shows Meridian reaching 150,000 residents as early as 2029.[29] As such, overcrowding at Meridian public schools has been a growing concern. From 2010 to 2016, student enrollment growth in the Meridian Joint School District #2 (otherwise known as West Ada) was at 7%.[30] Currently, there are nearly 39,000 students spread across 55 schools - 33 elementary; 10 middle; 12 high schools and is close to becoming one of the 100 largest school districts in the country.[31] Eric Exline, Chief Communications Officer for the West Ada School District, has recognized the impact this growth will have on the school district and estimates approximately 11,000 more students could potentially flood the already overcrowded school district very soon.[32]

With public schools having to deal with the challenges that come with overcrowding, families in the community are in desperate need of additional options for a quality education. DAI is a timely response to a continuously growing region with inadequate capacity in neighborhood public schools, large wait lists, and limited spaces available in similar educational programs.

With public schools having to deal with the challenges that come with overcrowding, families in the community are in desperate need of additional options for a quality education. DAI is a timely response to a continuously growing region with inadequate capacity in neighborhood public schools, large wait lists, and limited spaces available in similar educational programs.

While there are four Charter schools (two being technical high schools) within the 5-mile radius of DAI's proposed location, only 2 of these schools service students within DAI's same or overlapping age range. Furthermore, as shown below, neither school is an arts-integration school and both schools have confirmed waiting lists for every grade level according to the respective schools' registrars as of 10/9/19.

Table 6: Surrounding Charter School Information

School Name	Location (Address)	Year Opened	Current Enrollment	Grades Served and Educational Focus	Distance from DAI's proposed location	Waitlist Information
Compass Public Charter School	**4667 W. Aviator St.**	**2005**	**551 (K-8) 324 (9-12)**	**K-12 *Strong Academics & Safe***	**2.5 miles**	**400+ for students K-5.**

[29] Ibid.
[30] Boydston, Morgan. "Growing Idaho: How is growth impacting schools and education?". *7 KTVB.com: Growing-Idaho*. November 13, 2017 and updated March 14, 2019. URL: https://www.ktvb.com/article/news/local/growing-idaho/growing-idaho-how-is-growth-impacting-schools-and-education/277-491588287; last accessed June 2019.
[31] Ibid.
[32] White, Madeline. "West Ada School District combats overcrowding with new actions". *6 KIVI Boise.* January 15, 2019. URL: https://www.kivitv.com/news/education/making-the-grade/west-ada-school-district-combats-overcrowding-with-new-action; last accessed June 2019.

	Meridian (83642)			***School Culture***		
Gem Prep Meridian	**2750 E. Gala St. Meridian (83642)**	**2018**	**390**	**K-8 *Blended, Personalized Learning***	**4.9 miles**	***Waiting lists range from 25 to > 50 students.***

Additionally, while located just slightly outside of DAI's proposed 5-mile corridor (at 5.6 miles), it should be noted that North Star Charter school (a K-12 School of Business, International Baccalaureate program, with enrollment at 522) has confirmed waiting lists from the school registrar (10/10/19) as follows: over 200 on the Kindergarten waitlist and over 100 for every other grade level. North Star Charter certainly falls within DAI's area of impact and further highlights the demand for additional school of choice options.

Therefore, despite the proximity of already existing charter schools in our proposed target community, DAI meets the needs of our community by providing relief for overcrowded charter school classrooms and offers a quality educational model focused on arts-integration which is currently unique to the Meridian, Idaho area. For further evidence of our community's demand and interest in bringing the Doral model to Idaho, please see *Appendix F4 – Parent/Student Interest Forms*.

DAI's arts integration model has proven to produce meaningful gains for all students, including those with unique or specific needs. Specifically, two Doral schools in Florida are ranked as some of the best high schools in the nation by US News and World report: Doral Academy Charter High School (ranked #22 out of 911 Florida high schools and #351 nationwide with a 53% FRL and 94% minority population) and Doral Performing Arts and Entertainment Academy (ranked #13 out of 911 Florida high schools and148 nationwide with a 51% FRL and 91% minority population).

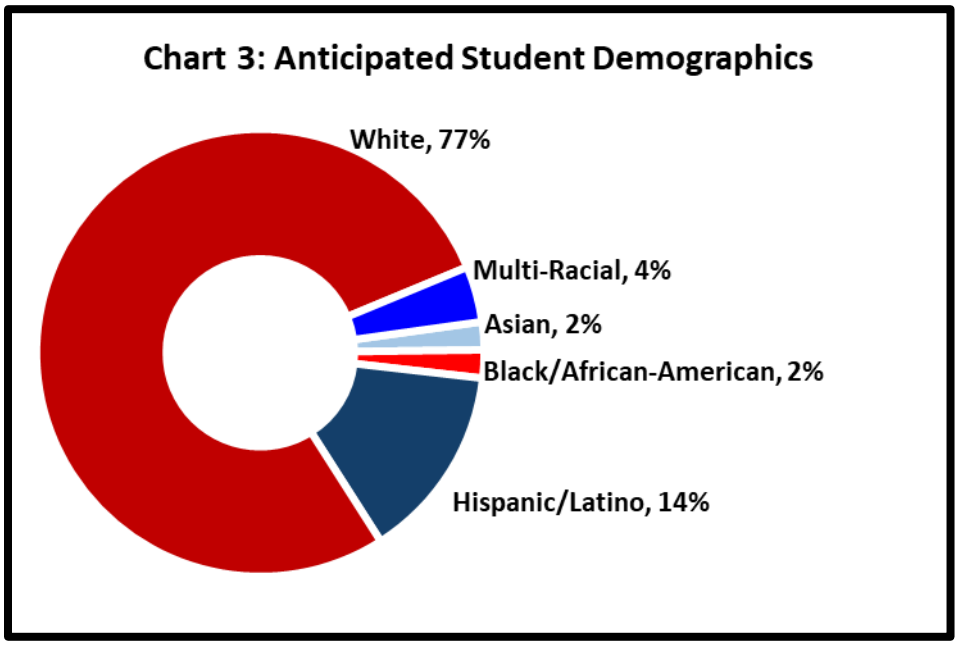
Additionally, DAI's model aligns with the Idaho Public Charter School Commission of ensuring excellent "public charter schools options…to Idaho families"[33] as DAI's educational model and philosophy is built on sound research and best practices. As such, DAI will provide families and students of the Meridian, Idaho area the quality educational choice they are seeking.

Student Population

In order to understand DAI's projected target population, the school's proposed governing board has examined student ethnicity demographics as well as academic achievement data from all Kindergarten-8th Grade public schools within a 5-mile radius of DAI's proposed facility

[33] Idaho Public Charter School Commission. *About the PCSC: Mission Statement.* URL: https://chartercommission.idaho.gov/about-the-pcsc/; last accessed June 2019.

site.[34] As such, DAI anticipates these findings will reflect the school's actual student body once the school opens.



As demonstrated in Chart 3 above, more than half (77%) of the students from our target community identify themselves as White.[35] The next largest category at fourteen percent (14%) is Hispanic/Latino, while the smallest existing ethnic categories are tied between Asian and Black/African-American, both at two percent (2%).[36] In addition to these projected ethnic demographics, the Governing Body of DAI has also examined special student subgroups, which are detailed below in **Table 6**:

Table 7: Anticipated Student Subgroups		
ELL	FRL	SWD
7%	37%	11%

As displayed in **Table 6** above, DAI anticipates serving a student body in which 7% are identified as English Language Learners (ELL), 37% qualify for Free/Reduced Lunch (FRL) services, and at least 11% are students with disabilities (SWD).[37]

[34] Data was obtained through the Idaho State Department of Education, compiled, and then averaged to produce the findings shown above.
[35] Idaho State Department of Education. "Idaho School Finder". *Explore Schools and Districts.* URL: https://idahoschools.org/; last accessed June 2019.
[36] Ibid.
[37] Ibid.

Enrollment Capacity

DAI plans to open in August of 2020, with grades K-5, and will add subsequent grades until it reaches grade 8, as shown in **Table 7**. The total school capacity is expected to be 489 at full build out.

Table 8: Enrollment					
Grade	**2020-21**	**2021-22**	**2022-23**	**2023-24**	**2024-25**
K	40	40	40	40	40
1	40	40	40	40	40
2	42	42	42	42	42
3	21	42	42	42	42
4	25	25	50	50	50
5	25	25	25	50	50
6	-	50	75	75	75
7	-	-	50	75	75
8	-	-	-	50	75
Total	**193**	**264**	**364**	**464**	**489**

Community Partnerships and Local Support

Community partnerships are extremely important as it broadens the student's opportunity to be exposed to the quality curriculum and educational experiences during the school day and outside the school day. DAI will seek partnerships with community organizations that enrich the after-school programs, field trips, guest speakers, etc.

Early relationships that have been cultivated that will help amplify our students' educational experiences include:

- Academica Nevada
- Pinecrest Inc.
- Jostens
- AdvancED

Enrolling Underserved Families

DAI's plan for student recruitment involves a wide array of media and materials to promote the school to ensure that the school reaches the widest possible audience. Promotional flyers and/or brochures will be distributed via direct mail as well as to community groups and churches to ensure that harder-to-reach families are aware of the school and their eligibility to apply for enrollment. Digital and social media marketing/advertising will be used in order to reach out to a broad audience through ads, which direct parents to click on the school's website.

Examples of social and digital marketing/ads include: Ads on Facebook, Digital ads on Pandora, Sponsored ads on Instagram, and Google Ads. Informational materials will be available in multiple languages, as needed. The school commits to using Social Media accounts as a means to promote the school and inform the community of the school's opening. The school will tailor its social media strategies to target specific audiences including local businesses and community organizations.

The School will distribute press releases and/or public service announcements to various media outlets to promote the open enrollment period, open house and other essential details about the school and its programs. A banner will also be posted on site with relevant information, including the school's website information, grade levels to be served, and phone number. PAI will host informational meetings either on the school site or a nearby location which would be accessible to all interested in attending the school. These events would be promoted in the same manner as listed above. During the informational meetings, the school will highlight its program and how it will serve all students.

Once opened, parents and community partners will be encouraged to inform family, friends, and their community groups about the School. Local elected officials and community leaders will be invited to visit the School. They will also be given an update on the program's growth and will be asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

DAI has secured an interest-free loan and plans to spend $10,000 of these start-up funds for advertising/marketing. The timeline and costs of DAI's Marketing Plan are detailed in Table 9, below:

Table 9: Start-Up Marketing Plan

Timeline	Item	Cost
December 2019 – March 2020	Develop DAI website	*$ 1,500*
December 2019 – March 2020	Create Facebook page and other possible social media outlets	*$ 0*
December 2019 – March 2020	Create and print flyers/brochures with information about the educational program	*$ 2,500*
January-March 2020	Continue conversations with business and community leaders about the school and its purpose.	*$ 0*
March-June 2020	Host informational nights for potential families and collect contact information	*$ 100*
March-June 2020	Purchase banners to place at the school site upon approval	*$ 2,500*

May-August 2020	Distribute press releases announcing approval of the school and to promote open enrollment period	*$ 700*
May-August 2020	Create and distribute direct mail pieces that includes additional information about enrollment procedures	*$ 1,500*
May-August 2020	Run social media ads	*$ 1,100*
May-August 2020	Host various informational nights for parents interested in learning more about the school program and enrollment procedures	*$ 100*

To recruit all students fairly in the target area, we are using comprehensive outreach and marketing strategies to ensure that potentially interested students and parents have equal access to apply and enroll at the school. These include recruiting and marketing initiatives that target the entire community, provide information for economically disadvantaged students and families, those who may have limited English proficiency, special physical or academic needs, or may be at risk of academic failure.

DAI will market the opening of the school via multiple modes to ensure that all families are informed of their educational options. A grassroots recruitment campaign is especially important to make sure that "harder-to-reach" families (e.g. single-parent families, low socio-economic households, second language families, etc.) are aware of the choice program and their eligibility to apply for enrollment. A grassroots marketing campaign includes: a school website, Facebook, flyers, direct mailers, advertisements in varying media, building relationships with community groups, and a "door to door" approach. The School will post flyers in local public facilities such as the post office, community centers, libraries and other locations of public access, and will also use banner advertisement on the proposed location.

Marketing materials will contain inclusive language to inform parents that all students are welcome to apply to DAI regardless of their socioeconomic status, race/ethnicity, home language, or enrolled academic program (Special Education, English Language Learners). The school's website will be built with language translation options. Informational meetings will be hosted at varying times during the day to accommodate different work schedules.

Furthermore, DAI understands that transportation may provide a significant barrier for families from the community who are interested in attending the school. DAI has allocated revenue funds in its budget to provide transportation services for students and families who would not be able to attend otherwise. Therefore, during the school's proposed marketing campaign, DAI's governing board and Principal (when selected) will ensure that this vital piece of information is also communicated clearly and effectively to ensure all interested families have an opportunity to attend Doral Academy of Idaho. Additionally, children of full-time employees will be included in the First Preference Category of the Equitable Selection and Enrollment Process.

V. SCHOOL LEADERSHIP & MANAGEMENT

School Administration and Leadership

Doral Academy of Idaho (DAI) understands the strong relationship between effective educational leadership and student learning. In order to improve student learning, educational leaders must focus on how they are promoting the learning, achievement, and social-emotional development of each student. To fulfill those endeavors, DAI recognizes that the domains included in the Idaho Standards for Effective Principals are essential to a successful school.

The Governing Board of DAI plans to hire a school leader that promotes success for all students through a positive school culture, effectively communicates the school's mission and vision, and advocates for education to all stakeholders to garner support and involvement. The school's Educational Service Provider, Academica, will assist with the advertising of the principal position and collection of application packets. A rubric will be developed with the board to identify 'must haves' in applicants and determine which candidates will be interviewed. Sample interview questions will be provided to the board, and the board will be conducting principal interviews and making final decisions on the candidate selected.

The Principal is responsible for communicating school culture to all employees. This process begins during the interview for employment. Candidates for employment at DAI will be screened for personal mission, vision, and pedagogical beliefs. Candidates that have beliefs that closely align to the school's mission and vision and have the necessary pedagogical skill set will be offered employment. During orientation week, teachers and students will have the opportunity to learn about the mission and vision as a group. This allows for teachers to reiterate what they have learned in the previous week's staff development and share with their students the importance of the mission and vision of DAI. In addition, every classroom will display DAI's mission and vision. The buildings atmosphere and décor will show the ethos of the school through inspirational quotes, the mission, and vision being posted. These will showcase the importance they play in the school's culture.

The principal will promote a collaborative leadership style that fosters shared leadership to capitalize on the expertise of individual leaders within the school and build capacity in teacher leaders through the promotion of professional development opportunities and self-reflection. The school leader will establish accountability for all based on professional, legal, ethical and fiscal standards. To develop and build leadership capacity, subject-level lead teachers are chosen and provided leadership opportunities. Teacher leaders meet with administration weekly to establish goals and provide feedback. This collaboration with lead teachers will ensure teachers are able to give feedback and directives in collaborative teams with their colleagues. Collaborative teams held daily will ensure that all DAI systems are consistently enforced and evaluated for effectiveness.

Finally, the school leader will have strong instructional leadership background in order to facilitate the school's vision, goals, continuous improvement of instruction, evaluation of teachers and the recruiting and hiring of teachers. The Charlotte Danielson Framework for

Teaching serves as the basis for the evaluation of all teachers at DAI. This tool will be used to create classroom communities that are intellectually active and where students assume a large part of the responsibility for the success of the lesson through monitoring of their own learning. Teachers will be involved in a collaborative evaluation process between the evaluator and themselves. In addition, peer observations through Lesson Study will be a component of the evaluation process as evidenced in Domain 4: Professional Responsibilities – Participating in a Professional Community.

DAI's and Doral Academy Inc.'s (Doral Inc.) affiliation is a key partnership in the success of the proposed leadership and curriculum development plans, as DAI plans to replicate the highly successful model of Doral Academy Inc. (Doral Inc.). Doral Inc. has successfully opened and implemented this model and best practices at their schools in Florida and Nevada.

As a replicated model school, DAI will also benefit from the support of the Doral Academies of Las Vegas and the support of the Executive Director from Doral Academy of Nevada, Bridget Bilbray-Phillips. Mrs. Phillips' legacy of leadership embodies the "it takes a village" mantra, which will make her an outstanding school leader mentor for the principal at DAI. She has successfully participated in the establishment of multiple charter school campuses, serving as the founding Principal of both the Somerset Academy-Oakey Campus and Doral Academy's West Saddle Campus. Prior to her work with charter schools, Mrs. Phillips served as an administrator in the Clark County School District where she also oversaw the opening of new campuses. As such, Mrs. Phillips has the experience of establishing new campuses in both the School District and Charter school environment and understands those challenges unique to Charter Schools. The mentorship by Mrs. Phillips or members of Doral Academy Inc. is provided at no expense to the school but rather as a part of the affiliation within the system. As a network, current Doral Academy employees from across the nation are committed to supporting new growth in Idaho to ensure success in replicating the Doral Academy model. The only expenses incurred to the school would be for travel which will be covered under the Professional Development line within the budget designated for Continuous Improvement and Strategic Planning or under the Professional Development line of the budget using available funds from Special Distributions from the state of Idaho.

The Doral Academy of Idaho organizational chart includes the Governing Board at the top. The school's principal will be hired by and report directly to the Governing Board. The school's principal will be responsible for the day-to-day operations of the building and the supervision and development of school programs. All school staff including assistant principals, instructional coaches, teachers, office staff, and support staff will report to the building principal. Doral Academy Affiliation Support from both Nevada and Florida will provide support and guidance in school operations and arts integration to both the Governing Board and the principal. Please see *Appendix D - School Administration and Organization Chart* for a chart summarizing the responsibilities of the stakeholders within Doral Academy of Idaho.

Table 10: Stakeholder Responsibilities			
Function	**Governing Board**	**School Leadership**	**Staff**
Performance Goals	The Board will set annual goals to address student performance and organizational management.	The School leader will set quarterly student performance goals. The Administration will be responsible for monitoring student assessment throughout the school year to assess student and teacher performance.	Teaching staff will set student performance goals as well as professional goal and monitor the progress throughout the year.
Curriculum	The Board will delegate the identification of curriculum to the School's leader. The Board will verify that most curriculum purchased by the School is aligned with required state/federal testing.	Based upon teacher and student feedback and student performance data the School Leader will align curriculum to ensure success.	Teachers will implement curriculum adopted by the school and ensure alignment to the Idaho State Standards.
Professional Development	The Board will participate in a minimum of (4) hours of professional development annually.	A member of the administrative team will oversee, coordinate, assist and monitor the staff development process. The administrative team will be responsible for collaborating with Doral Academies in Nevada and Florida for joint professional development and training.	Teachers will participate in all required professional development and implement best practices shared during staff trainings.
Data Management and Interim Assessments	The Board will oversee that data management is being compiled in a compliant and effective way. The Board will provide resources to the Administration to procure highly effective assessment tools for the School.	The Administrators will determine the best possible interim assessment systems to use for the progression of their students. The Administration and teachers will be responsible for interpreting the data.	Teaching staff will administer benchmark assessment data and disaggregate the results to guide instructional decisions.
Promotion Criteria	The Board will adopt a Pay for Performance model that includes input from the teachers and administration.	Administrative team will be responsible for communicating promotion criteria to staff and making evaluations of staff.	Teachers will participate in training based on the Danielson Framework for Teaching and utilize the rubric for professional growth.

Table 10: Stakeholder Responsibilities			
Function	**Governing Board**	**School Leadership**	**Staff**
Culture	The Board will create/adopt policies and procedures to help create a culture that fosters the Mission and Vision of DAI.	The School Leadership will lead in a way to promote a healthy and enjoyable environment for their teachers, students and parents.	Staff will support school administration in implementing a positive school climate among students, parents, and peers.
Budgeting, Finance, and Accounting	The Board will oversee all aspects of the fiscal management of the School. The Board's Treasurer specifically will be responsible for reviewing and approving School Financials. The Board will adopt a financial policies and procedures manual that is in line with financial best practices of charter schools across the country.	The Principal will oversee portions of the budget such as expenses related to office supplies, travel, copier, etc. The Principal will review his/her budget with Academica on a bi-monthly basis.	Staff will follow all financial policies put into place for collection of money in the classroom.
Student Recruitment	The Board will develop a budget in their start-up year for marketing and student recruitment. If the School is unable to attain the full enrollment, funds will be allocated for student recruitment.	The School Leader will be responsible for attending open house meetings to help recruit students. The School Leader will be instrumental and a focal point in recruiting students during start-up and operational years of the school.	Staff will participate in student recruitment where applicable.
School Staff Recruitment and Hiring	The Board will develop and review specific personnel polices to support its goals and to ensure fairness and compliance with state and federal law. The Board will interview and hire the Principal.	The Principal and other Administrators will interview and hire all teachers and support staff. School Leadership will attend teacher recruitment fairs if needed.	Teachers will participate in the interview process of potential peers who might be joining their identified department or grade level.
HR Services (payroll, benefits, etc.)	The Board will choose a 3rd Party payroll company to contract with for the processing of payroll. The Board will work to implement benefits and incentives for the School employees.	The School Leadership will serve as a HR resource to their teachers and staff. The School Leadership will work with Academica to make sure that HR policies and procedures are followed correctly.	Staff will participate in the onboarding process to register for payroll and benefits.

Table 10: Stakeholder Responsibilities			
Function	**Governing Board**	**School Leadership**	**Staff**
Development/ Fundraising	With the assistance of the Administration and Academica, the Board will fundraise through its relationships in the community. The Board will decide which development groups they will deal with for the building of a facility.	The Principal will assist the Board in its development and fundraising efforts.	Staff will provide input to school leaders regarding fundraising targets.
Community Relations	The Board will build relationships with groups and organizations in the community that support the school's vision and mission	The Principal will also network and engage community businesses and organizations for the purposes of after-school programs, fundraising, field trips, educational programs, guest speakers, etc.	Staff will engage students in community outreach through service projects, field trips, and invitations to guest speakers.
IT	The Board will choose a 3rd party IT company to contract with for IT services.	The Principal will be responsible for reviewing the service provided by the IT company.	Staff will implement classroom technology and incorporate into weekly lessons.
Facilities Management	In compliance with all public bidding laws, the Board will select vendors.	The Principal will have her staff notify her of any facility concerns. The Principal will contact Academica with any issues regarding the facility for repair if Academica is requested to manage the vendor.	Staff will notify office staff of facility concerns especially when it involves student safety.
Vendor Management / Procurement	In compliance with all public bidding laws, the Board will select vendors.	The School Leadership will give feedback to the Board and Academica regarding the quality of service provided by vender. School Leadership will contact Academica for any changes or corrective action that needs to take place with the vendor.	Staff will provide feedback to office staff regarding vendors working with the school for facility maintenance or procurement.
Student Support Services	The Board will allocate resources to the School Leader for student support services.	The Principal will develop programs within the school to assist students in overcoming personal concerns and academic deficiencies that could impair their ability to succeed as students.	Staff will engage students in the education of the whole child – academically, socially, and emotionally.

Leadership Evaluation

The Principal shall be evaluated by the Board of Directors. This evaluation will take place twice a year (mid-year and end-of-year). The evaluation process will give the administrator an opportunity to set personal and professional goals in alignment with the charter prior to the beginning of the school year. The formal evaluation will consist of documentation giving evidence of the Principal's progress toward meeting school and professional goals and setting new goals. The evaluation process should also provide opportunities to recognize exemplary performance or correct concerning behavior.

The tool used to evaluate DAI's school leaders is currently in the development process, but will combine elements from two successful tools already in existence: the *Idaho Principal Evaluation Framework*[38] from the Idaho Department of Education and the *Principal Performance Evaluation Systems* (PPES) developed by Strong and Associates[39]. Idaho's *Principal Evaluation Framework*, which is built upon the Interstate School Leaders Licensure Consortium (ISLLC) standards, provides administrators a robust outline of quality and effective school administration.

Stronge and Associates' PPES, which is based on research-guided performance standards, focuses on behaviors and results. Critically, because the principal serves not only as the school's instructional leader with general academic oversight similar to that of a district school principal, but also as the senior leader of the school's local education agency and the non-profit organization as a whole, the evaluation of this individual encompasses domains outside of those identified by the *Idaho Standards for Effective Principals* as he or she is accountable not only for meeting those standards, but also for fulfilling the academic, organizational, and financial commitments that the school's governing board agrees to with the execution of the performance certificate. To the extent that the school is failing to meet any of those academic, organizational, or financial expectations, the responsibility either lies at the foot of the principal for failing to meet those commitments or on the board itself. Please see *Appendix F5 – Principal Evaluation* for further information.

Table 11: Principal Performance Standards

Behaviors	Results
• Instructional Leadership • School Climate • Human Resources Leadership • Organizational Management	• Student Progress • Organizational Compliance • Financial Compliance

[38] Idaho Department of Education, *Idaho Principal Evaluation Framework.* URL: https://www.sde.idaho.gov/federal-programs/ed-effectiveness/files/professional-principals/Idaho-Principal-Evaluation-Framework.pdf; last accessed October 2019.

[39] Stronge, James H. (2013). *Principal Evaluation: Standards, Rubrics, and Tools for Effective Performance.* Alexandria, VA:ASCD

• Communication and Community Relations • Professionalism	

Educational Services Provider

Doral Academy of Idaho is planning to contract with Academica, a nationwide education support services provider (ESP), to provide replication assistance and business support services. Academica is one of the nation's longest-serving and most successful charter school service and support organizations. Its mission is to facilitate each governing board's vision by handling the 'business' of the school, allowing the school to stay student-focused.

The Doral Academy of Idaho Proposed Board Chair, Carolyn Baird, was introduced to Academica through another charter that was interested in expanding in the state of Idaho. That network, Pinecrest Academy, currently contracts with and recommended Academica to serve as our Educational Service Provider. After comparing fees and services provided from other education service providers, DAI was inclined to select Academica Nevada. The Governing Board will do further due diligence in researching other Educational Services Providers and will not enter into any contract until after the charter is approved.

Academica was founded in 1999 on the principle that each school is a unique educational environment led by an independent governing board. Academica works to help its clients achieve their educational and organizational goals. Academica's clients maintain complete control over their schools' academic programs, staffing needs, management, and curricula. Academica has local offices that serve charter management organizations and independent charter schools in Arizona, Florida, California, Texas, Utah, Nevada, Idaho, Colorado, and Washington D.C. Doral Academy of Idaho will benefit from not only the Doral Academy network of schools in Nevada and Florida, but also an existing portfolio of over 150 Academica partner schools. Additionally, in a recent article[40] from the Harvard University-sponsored journal, *Education Next,* several schools which Academica services were identified for both their high student performance as well as closing achievement gaps for educationally disadvantaged students. (See *Appendix F7 – Education Next Article* for the full article).

Primarily, an Academica staff member will work as a liaison between the school, the DAI Board, and the Academica office in Nevada. The liaison will be responsible for assisting the Board Chair on conducting Board Meetings in addition to supporting the school's leadership team, when requested. Academica Nevada's portfolio includes nearly 20,000 students in Nevada, Colorado, and Arizona. All Academica schools follow industry best practices in regards to financial policies and procedures in addition to passing annual financial audits. Contact information for the Chief Operating Officer of Academica Nevada is as follows:

[40] Matus, Ron. "Miami's Choice Tsunami". *EducationNext.* Winter 2020. *Volume 20, No. 1*. Program on Education Policy and Governance. Harvard Kennedy School, Cambridge. 2019.

Ryan Reeves, Chief Operating Officer
Academica Nevada
6630 Surrey Street
Las Vegas, NV 89119

Academica Nevada's portfolio includes 38 schools that received star ratings in August 2018 (each elementary, middle, and high received their own star rating) on Nevada's statewide school performance framework. Of the 38 schools, 24 earned four and five star ratings and 9 received three star ratings. It is important to note that several new schools, including high schools, had insufficient data to generate ratings in 2018.

Role of Education Service Provider

The role of Academica is to serve at the will and guidance of the Board. We expect Academica Nevada and Doral Academy, Inc., to carry out the defined responsibilities found in their respective contracts and set forth in the "Scope of Services" below in a manner that is consistent and assists the board meet its vision. Academica's services are designed to allow the Principal and the Governing Board to focus on day-to-day school operations. Academica assists charters in many aspects including, but not limited to:

- Assist the Board in creating budgets and financial forecasts;
- Assist the Board in preparing applications for grant funds;
- Monitor and assure Compliance with all state reports;
- Assist the Board in locating and securing a school facility;
- Maintain the financial books of the school;
- Assist with systems development;
- At the Board's direction, prepare agendas and post notices of all board meetings;
- Assist the Board in identifying and retaining an employee leasing company;
- Provide human resources related services such as dispute resolution and contract preparation and review and;
- Assist the Board in renewing the School's charter.

As part of the commitment and relationship between Doral Academy of Idaho and Academica, it is understood and agreed that Academica will NOT do the following:

- Employ the School Administrator or any other licensed personnel;
- Draw orders for the payment of money, as that responsibility is limited strictly to the school's board and principal;
- Use fees paid by DAI to benefit or subsidize schools located outside of Idaho.
- Permit the school's lease and management contract to be conditioned one upon the other.

The payroll and employee leasing company is a third party vendor that will be providing a service to the school outside of the proposed Educational Service Provider. That contract agreement is approved by the Board of Directors, and the payroll processing fee is accounted for in the school's budget. If Academica has any affiliation with recommended vendors, this will

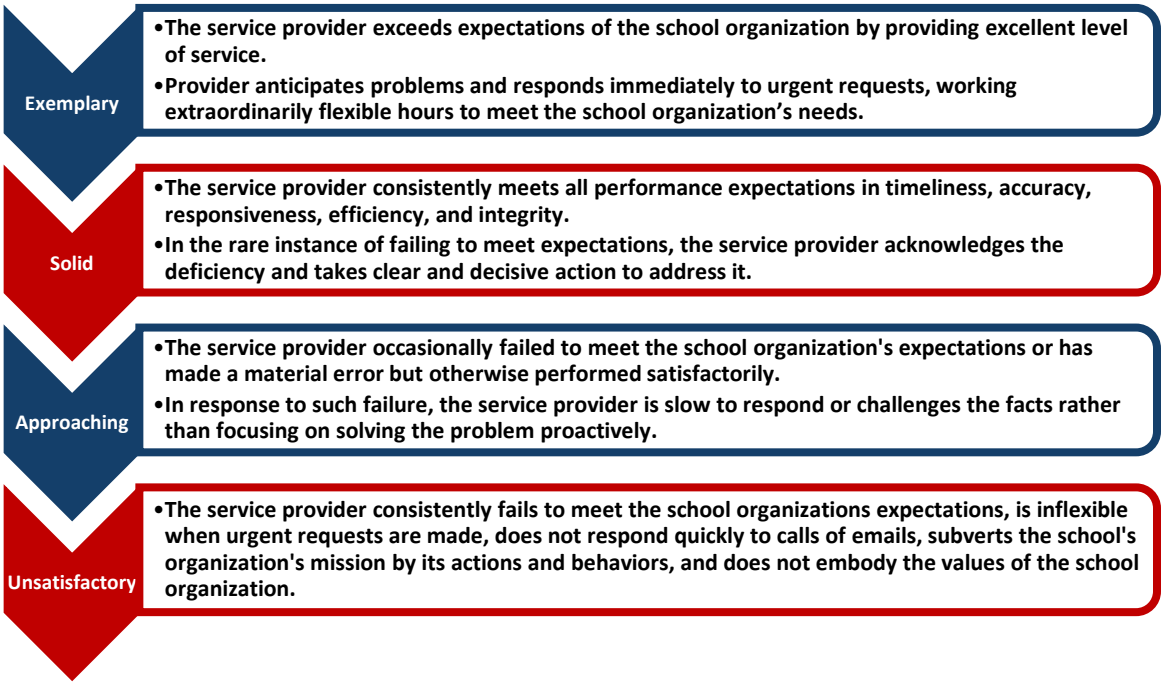
be disclosed to the Board during an Open Meeting prior to entering into any agreements. If the DAI Board does not approve of a vendor recommended by the Educational Service Provider, there is no impact to the contract with Academica.

As outlined in the *Appendix E - Education Service Provider*, all reimbursement of costs incurred by Academica on behalf of the school must be preapproved by the Board of Directors. The limit on these reimbursements is attributed to the expenses within the school's budget.

Evaluation of Education Service Provider

The board expects Academica to perform each of the specific duties of the contract. The evaluation of DAI's EMO will follow similarly to the Board's evaluation of its Principal, namely in three stages. At the beginning of the year, goals will be clearly established as it aligns with the school's contract. Lastly, both mid-way through the year, as well as at the end of the school year, all Board Member and the school leadership team will evaluate the service provider in different areas including Board Management, Facilities, Finance (Accounting, Accounts Payable, Budget, Payroll), Legal Services, Marketing, National School Lunch Program, Procurement, Registration, School Resource Development, State Reporting, and Teacher Recruitment. In evaluating the service provider, the Board Members and principal will use the Service Provider Rubric that can be found in *Appendix E – Education Service Provider.*

Additionally, at the Governing Board's discretion, the aforementioned Service Provider Rubric may be modified in order to adequately evaluate the services provided by Academica Nevada as the needs of the school change and develop over time. Some of these changes, may include but are not limited to, integrating standards and requirements relevant to the state of Idaho, such as those found in the *Idaho Principal Evaluation Framework.*



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Appendix E: Public Charter School Closure Protocol

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

CLOSURE PROTOCOL

August 2013

Background

This Closure Protocol is aligned to Idaho statute and rule and is designed to reflect best practices for managing the school closure process in an organized manner that protects the state, students and the community.

The Idaho Public Charter School Commission Closure Protocol is based on the Colorado Charter School Sample Closure Framework released in 2011 and publicly available at www.charterschoolquality.org. The Colorado Sample Closure Framework was created through the collaborative work of the Colorado Department of Education, the Colorado League of Charter Schools, and the Colorado Charter School Institute.

The Colorado Charter School Sample Closure Framework incorporated information from the following sources:

1. *Accountability in Action: A Comprehensive Guide to Charter School Closure*. Edited by Kim Wechtenhiser, Andrew Wade, and Margaret Lin. National Association of Charter School Authorizers (2010).
2. Colorado Charter School Institute Closure Project Plan (2010).
3. *Charter Renewal*. Charter Schools Institute, The State University of New York (SUNY).
4. *Pre-Opening Checklist and Closing Checklist*. Office of Education Innovation, Office of the Mayor, City of Indianapolis.
5. *2010-2011 Charter Renewal Guidelines*. District of Columbia Public Charter School Board.

During the revision process, the following additional sources were integrated into the Idaho Public Charter School Commission Closure Protocol:

6. *Navigating the Closure Process*. Matthew Shaw. Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011).

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Introduction

Charter school closures happen when a school's charter is revoked, non-renewed, or relinquished. A number of factors can lead to closure of the school, including poor academic performance, finances, governance, or safety issues. Regardless of the reasons for closure, the board of directors of the public charter school is responsible for managing the closure and dissolution process.[2] Cooperation between the public charter school board and administrator, authorizer, and other state entities can allow for the facilitation of a smooth process that "minimize[s] disruption for students while ensuring that public funds are used appropriately."[3]

The closure process should begin as soon as the authorizer or the charter school board takes initial action to close the school, regardless of whether an appeals process has been completed or the decision has been finalized. This allows the school and authorizer to discuss the potential closure, identify a tentative timeline for the final decision, and work together to establish a closure team and clear paths of communication with each other, stakeholders, and the community.

Whenever possible, the authorizer and public charter school should work together to ensure that the school is able to operate through the completion of the regularly-scheduled school year. Under most circumstances, this should allow adequate time to complete all closure tasks. More importantly, it minimizes instructional gaps for students. However, there are occasions when it is necessary for a school to close mid-year. In these cases, students' educational transitions should be the highest priority. The school, authorizer, and other state entities must also identify the appropriate closure team and work closely together to prioritize closure tasks and manage their completion in as organized and efficient manner as possible.

Though individual schools should develop closure plans that are tailored to their situation, resources, and needs, all schools should keep the following primary goals in mind:

1. Providing educational services in accordance with the charter and performance certificate until the end of the school year, or the agreed upon date when instruction will stop.
2. Reassigning students to schools that meet their educational needs.
3. Addressing the school's financial, legal and reporting obligations.

The closure process has many tasks, which are illustrated in the chart below. Based on the circumstances surrounding the closure, not all tasks in this protocol may apply. When the charter school, authorizer, and other state entities meet at the outset of the closure process, they should refer to the Closure Protocol and identify which tasks will be required or necessary. During this meeting, responsible parties and completion dates should be agreed upon to ensure a transparent and smooth closure. The template that follows includes the basic tasks that will usually need to be addressed to close a school; the format allows for the insertion of responsible parties and task deadlines.

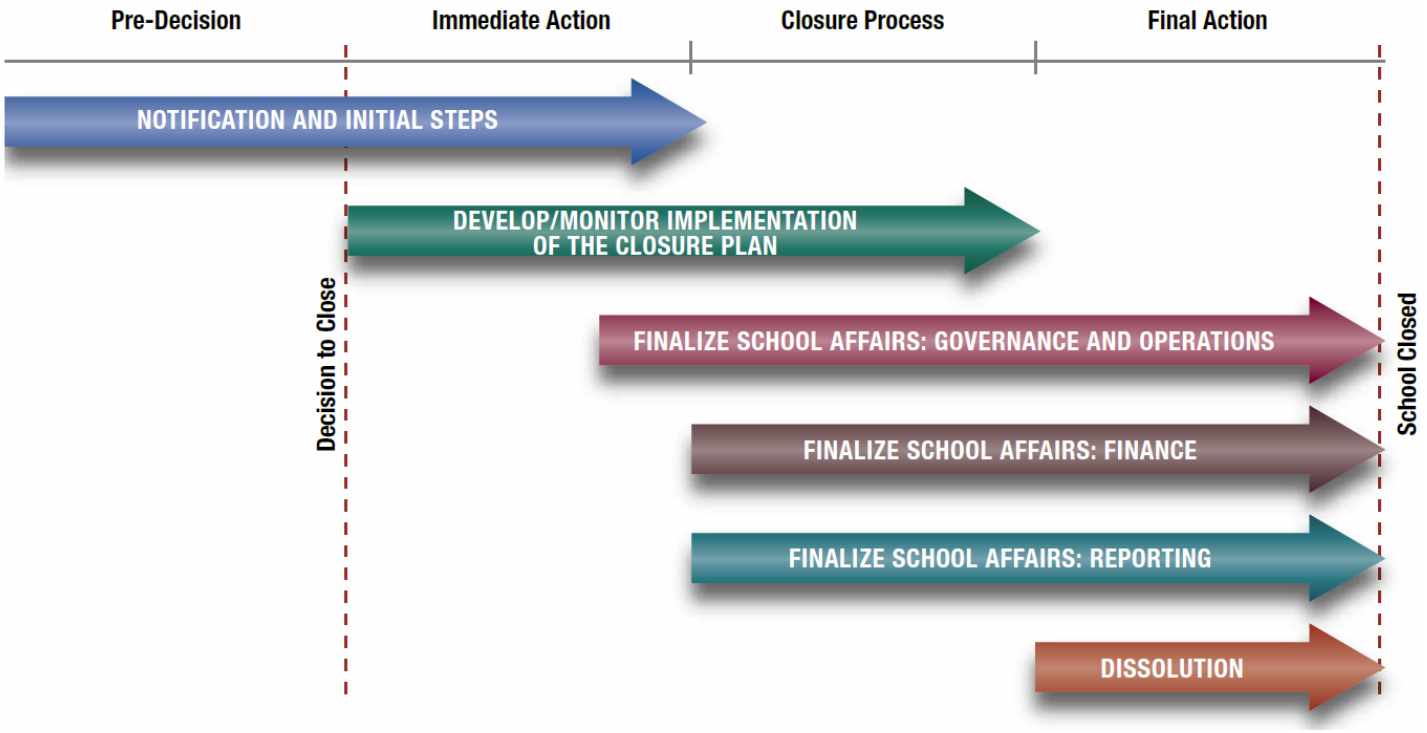
Endnotes

[1] Peyser, J. and Marino, M. "Why Good Authorizers Should Close Bad Schools." Accountability in Action: A Comprehensive Guide to Charter School Closure. National Association of Charter School Authorizers (2010). Pages 6 and 9.

[2] I.C. § 33-5212

[3] Shaw, M. "Navigating the Closure Process." Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011). Pages 2-3.

A Conceptual Timeline for Closure



Notification and Initial Steps

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Meet with PCSC and SDE staff Within 3 business days of the authorizer's or school's initial / intended closure decision, the charter school administrator and a representative of the school's board will meet (in-person or via telephone or web conference) with staff representatives of the PCSC and SDE to: **1.** Review the remaining process for finalizing the closure decision as applicable **2.** Review the Closure Protocol and tasks and clarify critical deadlines **3.** Identify points of contact for media or community questions **4.** Draft communication to staff, families, and affected districts	School, PCSC, SDE			
Notify Parents / Guardians of Potential Closure **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to enrolled families. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Assurance that instruction will continue through the end of the school year or an estimation of when instruction will cease. • Assurance that after a final decision is reached, parents/students will be notified and assisted in the reassignment process. • Public Charter School Closure FAQ. • Contact information for parents/guardians with questions.	School, PCSC			
Notify School Districts Materially Impacted **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to districts materially impacted by the closure decision. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Copy of the letter sent to parents. • Public Charter School Closure FAQ. • Contact information for questions.	School, PCSC			
Meet with Charter School Faculty and Staff Administrator and charter board chair meet with the faculty and staff to: **1.** Discuss reasons for closure, status of appeals process (if applicable), and likely timeline for a final decision. **2.** Emphasize importance of maintaining continuity of instruction through the end of the school year. **3.** Emphasize need to limit expenditures to necessities. **4.** Discuss plans for helping students find new schools and need for teachers and staff to have organized student files prepared for transfer. **5.** Identify date when last salary checks will be issued, when benefits terminate, and anticipated last day of work. **6.** Describe assistance, if any, that will be provided to faculty and staff to find new positions.	School			
Review and Report on Finances **1.** Review budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable. Communicate with the PCSC and SDE regarding financial status and next steps. **2.** Limit expenditures to only those in the approved budget and delay approving expenditures that might no longer be necessary until a revised budget is approved. **3.** Communicate with the SDE regarding whether there are any anticipated changes to remaining disbursements from the state.	School, PCSC, SDE			

Send Additional and Final Notifications **1.** Notify parents and affected school districts in writing after key events (e.g., denial of an appeal) and when the closure decision is final. **2.** The letters notifying staff, parents, and other districts of the final closure decision should include: • The last day of instruction. • Any end-of-the-year activities that are planned to make the transition easier for parents and students. • Assistance that will be provided to families in identifying new schools. This may include a list of school options; application deadlines or open house dates for traditional public, public charter, or private schools; or individual meetings with families. • Basic information about the process for access and transfer of student and personnel records.	School, PCSC			

Develop/Monitor Implementation of the Closure Plan

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Establish Transition Team, Develop Closure Plan, and Assign Roles **1.** Contact appropriate entities to establish a transition team, including: • A member of the PCSC staff • A member of the SDE staff • Charter school board chair • Lead administrator from the charter school • Lead finance person from the charter school • Additional members as deemed appropriate **2.** Develop plan, review roles of primary entities, identify individuals responsible for closure tasks, and exchange contact information.	School, PCSC, SDE			
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 and transfer of student records. **2.** Identification of long-term storage location of student and personnel records; plan for access and communication to parents regarding access. **3.** Notification to entities doing business with the school. **4.** The status of the school's finances, including outstanding expenses and payment of creditors and contractors. **5.** Sale, dissolution, or return of assets. **6.** Submission of all required reports and data to the authorizer and/or state.	School			
Submit Final Closure Report Submit the completed closure Protocol document and appropriate final closure documents to the PCSC (see the Reporting section for more details).	School			

Finalize School Affairs: Governance and Operations

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
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.	School			
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, 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.	School			
Notify Commercial Lenders / Bond Holders (if applicable) If the school has existing loans - Within 10 days after the final decision to close the charter school (after appeals process is complete), notify banks, bond holders, etc., of the school's closure and projected dates for the school's last payment towards its debt and if/when default will occur.	School			
Terminate EMO /CMO Agreement (if applicable) Review the management agreement and take steps needed to terminate the agreement at the end of the school year or prior to the intended closure date. **1.** The management company should be asked for a final invoice and accounting, including an accounting of any retained school funds and the status of grant funds. **2.** The school and the management company should agree upon how the company will continue to provide educational services until the last day of instruction. The school and the management company agree when other services including business services will end.	School			
Notify Contractors and Terminate Contracts **1.** Notify all contractors, including food service and transportation, 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.	School			
Notify Employees and Benefit Providers **1.** Whenever possible, provide employees with formal, written notification 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. WARN and COBRA) and eligibility for unemployment insurance pursuant to federal or state law or regulations of the Idaho Department of Labor. **2.** Notify benefit providers of pending termination of all employees, to include: • Medical, dental, vision plans. • Life insurance. • PERSI, 403(b), or other retirement plans **3.** Consult legal counsel as specific rules and regulations may apply to such programs.	School			

Finalize School Affairs: Governance and Operations (continued)

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain and Organize Records **1.** Maintain all corporate records related to: • Loans, bonds, mortgages and other financing. • Contracts. • Leases. • Assets and their sale, redistribution, etc. • Grants -- records relating to federal grants must be kept in accordance with 34 CFR 80.42. • Governance (minutes, bylaws, policies). • Accounting/audit, taxes and tax status, etc. • Employees (background checks, personnel files). • Employee benefit programs and benefits. • Any other items listed in the closure plan. **2.** Determine where records will be stored after dissolution.	School			
Transfer Student Records and Testing Material **1.** Ensure that all student records are organized and complete **2.** Within 10 days of receiving a records request, send student records, including final grades and evaluations, to the students' parent or new district and/or school, including: • Individual Education Programs (IEPs) and all records regarding special education and supplemental services. • Student health / immunization records. • Attendance record. • Any testing materials required to be maintained by the school. • Student transcripts and report cards. • All other student records. **3.** Document the transfer of records to include: • Date of transfer (for each individual student file transferred). • Signature and printed name of the charter school representative releasing the records. • Name and contact information of the receiver's representative. • The total number and percentage of general and special education records transferred.	School			
Inventory Assets and Prepare Federal Items for Pick-up **1.** Inventory school assets, and identify items: • Loaned from other entities. • Encumbered by the terms of a contingent gift, grant or donation, or a security interest. • Belonging to the EMO/CMO, if applicable, or other contractors. • Purchased with federal grants or funds (i.e. Charter Start grant) ➢ Items purchased with federal funds should be listed on the Federal Items Inventory spreadsheet provided by the PCSC. The list should be very detailed and complete, and items should not be sold or re-distributed. **2.** Return assets not belonging to school where appropriate documentation exists. Keep records of assets returned. **3.** Organize and pack items purchased with federal funds and arrange for PCSC walk-through and pick-up. ➢ Boxes should be packed, closed, taped, and *clearly* labeled with name(s) and/or number(s) corresponding to the inventory. ➢ PCSC walk-though must be scheduled in advance and must be at least 2 days prior to the scheduled move day. ➢ At the time of the walk-through, all federal items must be prepared and distinctly separate from other school assets. If the school's items are not adequately prepared for moving, the PCSC will delay the date for pick-up of federal items.	School, PCSC			

Finalize School Affairs: Finance

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain IRS 501(c)(3) Status Maintain IRS 501(c)(3) status until final dissolution. Notify IRS regarding any address change(s) and file required tax returns and reports.	School			
Notify Funding Sources / Charitable Partners Notify all funding sources, including charitable partners of school closure. Notify state and federal agencies overseeing grants / programs of school closure.	School			
Review and Revise School Budget 1. Review the school's budget and overall financial condition. 2. Make revisions, taking closure expenses into account closure while prioritizing continuity of instruction. Submit budget to PCSC and SDE. 3. Identify acceptable use of reserve funds.	School, PCSC, SDE			
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. Note that the creditor list is not the same as the contractor list (above), but should include any contractors with whom the school owes money (based on a contract or invoice). 1. Creditors include lenders, mortgage holders, bond holders, equipment suppliers, service providers and secured and unsecured creditors. 2. 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.	School			
Notify Debtors and Process Payments Contact debtors to request payment. Process and document received payments.	School			
Determine PERSI Obligations Contact PERSI to determine remaining liabilities for employee retirement program.	School			
Notify and Pay Creditors 1. Notify all creditors of the school's closure and request final invoices. 2. Sell appropriate assets. 3. Prioritize and pay creditors in accordance with I.C. § 33-5212(2). Document payments made.	School			
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.	School			
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.	School, SDE, Fed			
Prepare Final Financial Statement Retain an independent accountant to prepare a final statement of the status of all contracts and 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.	School			
Complete Final Financial Audit Complete a financial audit of the school in accordance with statute by a date to be determined by the authorizer. Submit final audit to the PCSC and SDE.	School, PCSC, SDE			
Reconcile with State Reconcile state billings and payments. Reimbursement of funds previously disbursed to the school may be required.	School, SDE			

Finalize School Affairs: Reporting

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Prepare and Submit End-of-Year Reports **1.** Communicate with the PCSC regarding necessary end-year or annual data or reporting that needs to be submitted and identify deadlines. **2.** Prepare and submit annual reports to the authorizer.	School, PCSC			
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.	School			
Prepare and Submit Final ISEE Report Within 10 days of final closure, submit a final ISEE report to the SDE.	School, SDE			
Prepare and Submit Final Budget and Financial Reporting Within 120 days of final closure, submit a final budget and financial reporting, including final financial audit, to the SDE.	School, SDE			
Prepare and Submit All Other Required State and Federal Reports **1.** Communicate with the SDE and the federal government to identify any outstanding or final reports required for federal, state, or special programs (special education, Title I, etc.) and confirm deadlines. **2.** Prepare and submit reports to the SDE and/or federal government.	School, SDE			
Prepare and Submit Final Closure Report to the PCSC Submit the completed closure Protocol document and a narrative and/or attachments that outline the following: **1.** The name and contact information of the individual(s) with whom the PCSC can follow-up after closure if there are questions or issues to be addressed **2.** The school's final financial status, including the final independent audit **3.** The status of the transfer and storage of student records, including: • The school's total enrollment at the start of the final semester • The number and percentage of student records that have been transferred prior to closure • The plan for storage and access to student records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of public communication to parents regarding how to access student records after closure **4.** The status of the transfer and storage of personnel records, including: • The school's total number of staff at the beginning of the final semester • The number and percentage of personnel records that have been distributed to staff and/or new employers • If necessary, the plan for storage and access to personnel records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of communication to staff regarding how to access personnel records after closure **5.** Additional documentation (inventories, operational info, etc.) may be included with the report	School, PCSC			

Dissolution

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Dissolve the Charter School (I.C. § 30-3-110) **1.** Give appropriate notice of the meeting per Open Meeting law and statute, including the intention to vote on the dissolution of the corporation. **2.** The charter school board adopts a plan of dissolution indicating to whom the assets of the non-profit corporation will be distributed after all creditors have been paid. (I.C. § 33-5206(9)) **3.** Unless otherwise provided in the bylaws, the board of directors votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution. (I.C. § 30-3-112)	School			
Notify the Secretary of State (I.C. § 30-3-112) **1.** After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth: • The name of the non-profit corporation. • The date dissolution was authorized. • A statement that dissolution was approved by sufficient vote of the board. • If approval of members was not required (commonly true for public charter schools), a statement to that effect and a statement that dissolution was approved by a sufficient vote of the board of directors or incorporators • Such additional information as the Secretary of State determines is necessary or appropriate.	School			
Notify Known Claimants (I.C. § 30-3-114) Give written notice of the dissolution to known claimants after the effective date of the dissolution. Claimants have 120 days from the effective date of the written notice to submit a claim.	School			
End Corporate Existence (I.C. § 30-3-113) 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.** Preserving and protecting its assets and minimizing its liabilities. **2.** Discharging or making provision for discharging its liabilities. **3.** Disposing of its properties that will not be distributed in kind. **4.** Returning, transferring or conveying assets held by the corporation upon a condition requiring return, transfer or conveyance, which condition occurs by reason of dissolution, in accordance with such condition. **5.** Transferring, subject to any contractual or legal requirements, its assets as provided in or authorized by its articles of incorporation or bylaws. **6.** Doing every other act necessary to wind up and liquidate its assets and affairs.	School			
Notify IRS Notify the IRS of dissolution of the education corporation and its 501(c)(3) status and furnish a copy to the authorizer.	School			

"If charter schools are to have any hope of transforming public education, they cannot settle for simply being pretty good or just above average – especially when that average is well below what students need to succeed in the world. From this perspective, charter schools need to be about excellence. Specifically, they need to prove that excellence is possible and achievable at scale and under difficult circumstances, even with students whom others may have given up on."

"All of those who embark on this perilous journey of hope deserve our deepest gratitude and respect for embracing this challenge with courage, persistence and good faith. But these virtues alone are not enough. Charter schools are not supposed to rest on good intentions and earnest effort; they are supposed to achieve meaningful results demonstrated by a sound body of evidence over the charter term. Charter schools that cannot deliver on that promise, either to their students or the broader public, need to be closed. This is the unpleasant, but imperative responsibility of authorizers."

-- James A. Peyser and Maura Marino. "Why Good Authorizers Should Close Bad Schools."[1]

CHARTER SCHOOL PERFORMANCE CERTIFICATE

This performance certificate is executed on this 13th day of December, 2019, by and between the Idaho Public Charter School Commission (the "Authorizer"), and Pinecrest Academy of Idaho (the "School"), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Law, Idaho Code Section 33-5201 *et seq*, as amended (the "Charter Schools Law.")

RECITALS

WHEREAS, on August 30, 2019, Authorizer received a petition to request the creation of a new charter school referred to as Pinecrest Academy of Idaho; and

WHEREAS, on December 13, 2019, the Authorizer approved the charter petition (the "Charter") subject to conditions outlined in Appendix A;

NOW THEREFORE in consideration of the foregoing recitals and mutual understandings, the Authorizer and the School agree as follows:

SECTION 1: AUTHORIZATION OF CHARTER SCHOOL

A. Establishment of School. Pursuant to the Charter Schools Law, the Authorizer hereby approves the establishment of the School on the terms and conditions set forth in this Charter School Performance Certificate (the "Certificate"). The approved Charter is attached to this Certificate as Appendix D.

B. Pre-Opening Requirements. Pursuant to Idaho Code Section 33-5206(6), the Authorizer may establish reasonable pre-opening requirements or conditions ("Pre-Opening Requirements") to monitor the start-up progress of a newly approved public charter school to ensure that the school is prepared to open smoothly on the date agreed. The School shall not commence instruction until all pre-opening requirements have been completed to the satisfaction of the Authorizer. Pre-opening requirements are attached as Appendix C. If all pre-opening conditions have been completed to the satisfaction of the Authorizer, the School shall commence operations/instruction with the first day of school in Fall 2020. In the event that all pre-opening conditions have not been completed to the satisfaction of the Authorizer, the School may not commence instruction on the scheduled first day of school. In such event, the Authorizer may exercise its authority on or before July 20 to prohibit the School from commencing operation/instruction until the start of the succeeding semester or school year.

C. Term of Agreement. This Certificate is effective as of December 13, 2019, and shall

continue through June 30, 2025, unless earlier terminated as provided herein. In addition to the five-year term of operations, the performance certificate term includes a pre-opening period. The school will be open to students starting the 2020-2021 school year.

SECTION 2: SCHOOL GOVERNANCE

A. Governing Board. The School shall be governed by a board (the "Charter Board") in a manner that is consistent with the terms of this Certificate so long as such provisions are in accordance with state, federal, and local law. The Charter Board shall have final authority and responsibility for the academic, financial, and organizational performance of the School. The Charter Board shall also have authority for and be responsible for policy and operational decisions of the School, although nothing herein shall prevent the Charter Board from delegating decision-making authority for policy and operational decisions to officers, employees and agents of the School, as well as third party management providers.

B. Articles of Incorporation and Bylaws. The articles of incorporation and bylaws of the entity holding the charter shall provide for governance of the operation of the School as a nonprofit corporation and public charter school and shall at all times be consistent with all applicable law and this Certificate. The School shall notify the Authorizer of any modification to the Articles or Bylaws within five (5) business days of approval by the Charter Board.

C. Charter Board Composition. The composition of the Charter Board shall at all times be determined by and consistent with the Articles and Bylaws and all applicable law and policy. The Charter Board shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five (5) business days of their taking effect.

SECTION 3: EDUCATIONAL PROGRAM

A. School Mission. The mission of the school is as follows: Pinecrest Academy of Idaho unites the community to prepare students for college and career.

B. Grades Served. The School may serve students in grades K-8.

C. Design Elements. The School shall implement and maintain the following essential design elements of its educational program:

- A course guide, lesson plans, and syllabi based on the Idaho Content Standards and national STEAM Standards as published by the National Center on Standards and Assessment Implementation.

- Data-driven, high-quality differentiated instruction for all students.
- A hybrid, standards-based approach to grading and communication of grades.
- A differentiated approach through blended learning to enhance student learning and goal tracking.

D. Standardized Testing. Students of the School shall be tested with the same standardized tests as other Idaho public school students.

E. Accreditation. The School shall be accredited as provided by rule of the state board of education.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

A. Oversight Allowing Autonomy. The Authorizer shall comply with the provisions of Charter School Law and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School. The Authorizer's Role will be to evaluate the School's outcomes according to this Certificate and the Performance Framework rather than to establish the process by which the School achieves the outcomes sought.

B. Charter School Performance Framework. The Charter School Performance Framework ("Performance Framework") is attached and incorporated into this agreement as Appendix B. The Performance Framework shall be used to evaluate the School's academic, financial and operational performance, and shall supersede and replace any and all assessment measures, educational goals and objectives, financial operations metrics, and operational performance metrics set forth in the Charter and not explicitly incorporated into the Performance Framework. The specific terms, form and requirements of the Performance Framework, including any required indicators, measures, metrics, and targets, are determined by the Authorizer and will be binding on the School.

C. Authorizer to Monitor School Performance. The Authorizer shall monitor and report on the School's progress in relation to the indicators, measures, metrics and targets set out in the Performance Framework. The School shall be subject to a formal review of its academic, mission-specific, operational, and financial performance at least annually.

D. School Performance. The School shall achieve an accountability designation of *Good Standing* or *Honor* on each of the three sections of the Performance Framework. In the event the School is a party to a third party management contract which includes a deficit protection clause, the School shall be exempt from some or all measures within the financial portion of the Performance Framework. In accordance with Charter School Law, the Authorizer shall renew any charter in which the public charter school met all of the terms of its performance certificate at the time of renewal.

E. Performance Framework As Basis For Renewal of Charter. The School's

performance in relation to the indicators, measures, metrics and targets set forth in the Academic and Mission-Specific, Operational and Financial sections of the Performance Framework shall provide the basis upon which the Authorizer will decide whether to renew the School's Charter at the end of the Certificate term. As part of the Performance Framework, the Authorizer agrees to consider mission-specific, rigorous, valid, and reliable indicators of the School's performance. These negotiated indicators will be included in the Mission-Specific portion of the Academic and Mission Specific section of the Performance Framework.

F. **Authorizer's Right to Review.** The School will be subject to review of its academics, operations and finances by the Authorizer, including related policies, documents and records, when the Authorizer deems such review necessary. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.

G. **Site Visits.** In addition to the above procedures, the Charter School shall grant reasonable access to, and cooperate with, the Authorizer, its officers, employees and other agents, including allowing site visits by the Authorizer, its officers, employees, or other agents, for the purpose of allowing the Authorizer to fully evaluate the operations and performance of the School. The Authorizer may conduct a site visit at any time if the Authorizer has reasonable concern regarding the operations and performance of the School. The Authorizer will provide the School reasonable notice prior to its annual site visit to the School. The School shall have an opportunity to provide a written response to the site visit report no later than fourteen (14) days prior to the meeting at which the report is to be considered by the Authorizer. If no written response is provided, the School shall have the opportunity to respond orally to the site visit report at the meeting.

H. **Required Reports.** The School shall prepare and submit reports regarding its governance, operations, and/or finances according to the established policies of and upon the request of the Authorizer. However, to the extent possible, the Authorizer shall not request reports from the School that are otherwise available through student information systems or other data sources reasonably available to the Authorizer.

SECTION 5: SCHOOL OPERATIONS

A. **In General.** The School and the Charter Board shall operate at all times in accordance with all federal and state laws, local ordinances, regulations and Authorizer policies applicable to charter schools.

B. **Maximum Enrollment.** The maximum number of students who may be enrolled in the school shall be 489. Growth toward capacity shall follow the enrollment chart in the charter, included herein as Appendix D. The School shall make student recruitment, admissions, enrollment and retention decisions in a nondiscriminatory manner and

without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the charter school than there are spaces available, the charter school shall select students to attend using an equitable selection process that shall be publicly noticed and open to the public.

A. Enrollment Policy. The School shall make student recruitment, admissions, enrollment and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the charter school than there are spaces available, the charter school shall select students to attend using a random selection process that shall be publicly noticed and open to the public.

B. School Facilities. TBD. The School shall provide reasonable notification to the Authorizer of any change in the location of its facilities.

C. Attendance Area. The School's primary attendance area is as follows: Twin Falls School District #91.

D. Staff. Instructional staff shall be certified teachers as provided by rule of the state board of education. All full-time staff members of the School will be covered by the public employee retirement system, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.

E. Alignment with All Applicable Law. The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

A. General. The School shall comply with all applicable financial and budget statutes, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School Performance Framework incorporated into this contract as Appendix B.

B. Financial Controls. At all times, the Charter School shall maintain appropriate governance and managerial procedures and financial controls which procedures and controls shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them (2) a checking account; (3) adequate payroll

procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants in accordance with applicable state and federal law.

C. **Financial Audit.** The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.

D. **Annual Budgets.** The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format and any other format as may be reasonably requested by the Authorizer.

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

A. **Termination by the School.** Should the School choose to terminate its Charter before the expiration of the Certificate, it may do so upon written notice to the Authorizer. Any school terminating its charter shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

B. **Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one (1) or more of the terms of its Certificate. Any school which is not renewed shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

C. **Revocation.** The School's Charter may be revoked by the Authorizer if the School has failed to meet any of the specific, written renewal conditions attached, if applicable, as Appendix A for necessary improvements established pursuant to Idaho Code§ 33-5209B(1) by the dates specified. Revocation may not occur until the public charter school has been afforded a public hearing, unless the Authorizer determines that continued operation of the public charter school presents an imminent public safety issue. If the School's Charter is revoked, the School shall work with the Authorizer ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

D. **Dissolution.** Upon termination of the Charter for any reason by the Charter Board,

or upon nonrenewal or revocation, the Charter Board will supervise and have authority to conduct the winding up of the business and other affairs of the School; provided, however, that in doing so the Authorizer will not be responsible for and will not assume any liability incurred by the School. The Charter Board and School personnel shall cooperate fully with the winding up of the affairs of the School.

E. Disposition of School's Assets upon Termination or Dissolution. Upon termination of the Charter for any reason, any assets owned by the School shall be distributed in accordance with Charter Schools Law.

SECTION 8: MISCELLANEOUS

A. No Employee or Agency Relationship. None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, ownership, or employment between the Authorizer and the School.

B. Additional Services. Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.

C. No Third-Party Beneficiary. This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.

D. Amendment. This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and the School have executed this Performance Certificate to be effective December 13, 2019.

Chairman, Idaho Public Charter School Commission

Connie L Hogher

Chairman, Pinecrest of Idaho School Board

Appendix A: Conditions of Authorization/Renewal
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Appendix A: Conditions of Authorization / Renewal

Conditions of Authorization/Renewal

Pinecrest Academy of Idaho was approved on December 13, 2019 with the following conditions:

1 – All board directors shall participate in a staff facilitated governance orientation within 60 days of approval and no less than six hours of staff approved governance training addressing the governance role in financial, operational, and academic oversight and legal compliance prior to May 11, 2020.

2 – The governing board shall present the executed facility lease and/or purchase agreement, record of any long-term debt incurred to date, and a year-one operational budget based on post-lottery enrollment estimates that evidences financial sustainability by May 11, 2020.

Appendix B: Performance Framework

Pinecrest Academy of Idaho
[YEAR] ANNUAL PERFORMANCE REPORT

INTRODUCTION

Each year, Idaho's Public Charter School Commission (PCSC) issues a performance report to every school in its portfolio. The annual report serves several purposes:

1. To provide transparent, data-driven information about charter school quality;

2. To ensure charter school boards have access to clear expectations and are provided maximum opportunity to correct any deficiencies prior to their renewal year; and

3. To inform mid-term authorizing decisions, such as the evaluation of charter amendment proposals.

This report contains an overview of the school, including its mission, leadership, and demographics. The overview is followed by the school's performance framework, including outcomes for the most recently completed school year.

The performance framework clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the PCSC's evaluations of the school. It contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship.

In accordance with Idaho law, the performance framework requires, at a minimum, that each school meet applicable federal, state, and authorizer goals for student achievement. It is designed to fulfill this requirement while respecting the diverse missions and student populations represented in PCSC portfolio schools. This performance framework was adopted by the Idaho Public Charter School Commission on May 4th, 2017.

To facilitate a clear context for the academic results contained in this report, the demographic, enrollment, and school leadership information provided is from the school year during which the data was gathered. Updated enrollment and school leadership information is available upon request from the school or PCSC office.

The data provided in this report was gathered primarily through the State Board of Education and State Department of Education. An independent financial audit and any applicable mission-specific data were submitted directly by the school. The school had a opportunity to correct or clarify its framework outcomes prior to the publication of this report.

Public charter school operations are inherently complex. For this reason, readers are encouraged to consider the scores on individual measures within the framework as a starting point for gaining a full, contextualized understanding of the school's performance.

PERFORMANCE FRAMEWORK STRUCTURE	
The academic section comprises the primary indicators on which most renewal or non-renewal decisions are based. The mission-specific, operational, and financial sections contribute additional indicators that are, except in cases of egregious failure to meet standards, considered secondary.	
Academic	The academic section focuses on quantitative academic outcomes. It reflects the PCSC's commitments to considering schools' performance in the context of their communities and student populations. Although some results may not be made publicly available in certain cases, in order to protect individually identifiable student information, the PCSC may still use this information for purposes of making authorizing decisions.
Mission-Specific	The mission-specific section provides an opportunity for meaningful acknowledgement of schools' achievements that are not reflected elsewhere in the framework. These measures may be academic or non-academic in nature, but must be objective and data-driven. Mission-specific measures are generally optional; however, inclusion of certain mission-specific measures may be required as a condition of the performance certificate.
Operational	The operational section considers whether schools are operating in compliance with federal and state law, authorizer requirements, and the provisions of their performance certificates.
Financial	The financial section evaluates the near-term and long-term financial status of the school. Schools with management contracts containing deficit protection clauses may be exempted from these indicators.

ACCOUNTABILITY DESIGNATIONS	
Calculation of the percentage of eligible points earned for each school determines that school's accountability designation in each section. The accountability designations, in turn, guide authorizing decisions. The PCSC will consider contextual factors affecting a school's accountability designations when making authorizing decisions.	
Honor	Schools achieving at this level in all sections are guaranteed renewal. Replication and expansion proposals are likely to succeed.
Good Standing	Schools achieving at this level in the academic section will be recommended for renewal; however, conditional renewal may be recommended if outcomes in other sections are poor. Replication and expansion proposals will be considered.
Remediation	Schools achieving at this level in the academic section may be recommended for non-renewal or conditional renewal, particularly if outcomes in other sections are poor. Replication and expansion proposals are unlikely to succeed.

Critical	Schools achieving at this level in the academic section face a strong likelihood of non-renewal, particularly if outcomes in other sections are also poor. Replication and expansion proposals will not be considered.

SCHOOL OVERVIEW			
Mission Statement	Pinecrest Academy of Idaho unites the community to prepare students for college and career.		
Key Design Elements	1) A course guide, lesson plans, and syllabi based on the Idaho Content Standards and national STEAM Standards as published by the National Center on Standards and Assessment Implementation. 2) Data-drive, high-quality differentiated instruction for all students. 3) A hybrid, standards-based approach to grading and communication of grades. 4) A differentiated approach through blended learning to enhance student learningand goal tracking.		
School Location	Twin Falls Location TBD	**School Phone**	
Surrounding District	Twin Falls #411		
Opening Year	2020		
Current Term	2020-2025		
Grades Served	K-8		
Enrollment (Approved)	489	**Enrollment (Actual)**	

SCHOOL LEADERSHIP	

STUDENT DEMOGRAPHICS				
	School	**State**	**Surrounding District**	**Neighboring District**
Non-White				
Limited English Proficiency				
Special Needs				
Free and Reduced Lunch				

ISAT PROFICIENCY RATES	
Percentage of students meeting or exceeding proficiency in Math	
Percentage of students meeting or exceeding proficiency in English Language Arts	
Percentage of students meeting or exceeding proficiency in Science	

GO-ON RATE (Post-secondary enrollment within 12 months of graduation)	

SCORECARD **ACADEMIC YEAR**

ACADEMIC	Measure	Points Possible K-8	Points Earned K-8	Points Possible 9-12	Points Earned 9-12	Points Possible K-12	Points Earned K-12	Points Possible Alternative	Points Earned Alternative
State Proficiency Comparison	1a	50	0						
	1b	50	0						
District Proficiency Comparison	2a	50	0						
	2b	50	0						
Criterion-Referenced Growth	3a	100	0						
	3b	100	0						
Norm-Referenced Growth	4a								
	4b								
Post-Secondary Readiness	5a								
Total Academic Points		400	0	0	0	0	0	0	0
% of Academic Points			0%		#DIV/0!		#DIV/0!		#DIV/0!

MISSION-SPECIFIC	Measure	Points Possible	Points Earned
	1		
	2		
	3		
	4		
	5		
	6		
Total Mission-Specific Points		0	0
% of Mission-Specific Points			#DIV/0!

OPERATIONAL	Measure	Points Possible	Points Earned
Educational Program	1a	25	0
	1b	25	0
	1c	25	0
	1d	25	0
Financial Management & Oversight	2a	25	0
	2b	25	0
	2c	25	0
Governance & Reporting	3a	25	0
	3b	25	0
	3c	25	0
	3d	25	0
	3e	25	0
	3f	25	0
School Environment	4a	25	0
	4b	25	0
Additional Obligations	5a	25	0
Total Operational Points		400	0
% of Operational Points			0%

FINANCIAL	Measure	Points Possible	Points Earned
Near-Term	1a	50	0
	1b	50	0
	1c	50	0
	1d	50	0
Sustainability	2a	50	0
	2b	50	0
	2c	50	0
	2d	50	0
Total Financial Points		400	0
% of Financial Points			0%

The financial measures above are based on industry standards. They are not intended to reflect nuances of the school's financial status. Please see the financial section of this framework for relevant contextual information that may alleviate concern.

ACCOUNTABILITY DESIGNATION	Range (% of Points Possible)	Academic Gen Ed Outcome	Academic Alt Outcome	Range	Mission Specific Outcome	Range	Operational Outcome	Range	Financial Outcome
Honor	75% - 100%			75% - 100%		90% - 100%		85% - 100%	
Good Standing	55% - 74%	#DIV/0!	#DIV/0!	55% - 74%	NA	80% - 89%	0%	65% - 84%	0%
Remediation	31% - 54%			31% - 54%		61% - 79%		46% - 64%	
Critical	0% - 30%			0% - 30%		0% - 60%		0% - 45%	

School outcomes will be evaluated in light of contextual information, including student demographics, school mission, and state/federal requirements.

All proficiency and growth measures will be scored using the ISAT by SBAC, or any state-required standardized test as may replace it. Subject area (math and ELA) may be replaced by similar subject areas if necessary due to statewide changes. On all applicable measures, standard rounding to the nearest whole number will be used for scoring purposes. Measures based on ISAT outcomes exclude alternate ISAT data; as a result, the outcomes shown may differ slightly from those published on the State Department of Education's website.

INDICATOR 1: STATE PROFICIENCY COMPARISON

		Result	Points Possible	Points Earned
Measure 1a	**Do math proficiency rates meet or exceed the state average?**			
Math Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in math exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

		Result	Points Possible	Points Earned
Measure 1b	**Do English Language Arts proficiency rates meet or exceed the state average?**			
ELA Proficiency Rate Comparison to State	**Exceeds Standard:** The school's proficiency rate in ELA exceeds the state average by 16 percentage points or more.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the state average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the state average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the state average.		0 - 14	0
				0
Notes	The state average will be determined using the same grade set as is served by the public charter school.			

	INDICATOR 2: DISTRICT PROFICIENCY COMPARISON			
Measure 2a	**Do math proficiency rates meet or exceed the district average?**	**Result**	**Points Possible**	**Points Earned**
Math Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in math either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in math is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Twin Falls School District #91 will be used for comparison purposes			

Measure 2b	**Do ELA proficiency rates meet or exceed the district average?**	**Result**	**Points Possible**	**Points Earned**
ELA Proficiency Rate				
Comparison to District	**Exceeds Standard:** The school's proficiency rate in ELA either exceeds the district average by 16 percentage points or more, or is at least 80%.		50	0
	Meets Standard: The school's proficiency rate in ELA is equal to the district average, or exceeds it by 1 - 15 percentage points.		30 - 45	0
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the district average.		15 - 29	0
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the district average.		0 - 14	0
				0
	The district average will be determined using the same grade set as is served by the public charter school.			
Notes	Because some schools have primary attendance areas crossing district lines, the school and authorizer will agree upon execution of the performance certificate which district (or other comparison group, in the case of virtual schools) will be used for comparison purposes. The comparison group should represent a majority of the school's enrollment. Twin Falls School District #91 will be used for comparison purposes			

INDICATOR 3: CRITERION-REFERENCED STUDENT GROWTH (GRADES K-8)

		Result	Points Possible	Points Earned
Measure 3a	**Are students making adequate academic growth to achieve math proficiency within 3 years or by 10th grade?**			
Criterion-Referenced Growth Math	**Exceeds Standard:** At least 85% of students are making adequate academic growth in math.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in math.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in math.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in math.		0-25	0
				0
Notes				

		Result	Points Possible	Points Earned
Measure 3b	**Are students making adequate academic growth to achieve English Language Arts proficiency within 3 years or by 10th grade?**			
Criterion-Referenced Growth ELA	**Exceeds Standard:** At least 85% of students are making adequate academic growth in ELA.		76-100	0
	Meets Standard: Between 70% and 84% of students are making adequate academic growth in ELA.		51-75	0
	Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in ELA.		26-50	0
	Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in ELA.		0-25	0
				0
Notes				

OPERATIONAL

	INDICATOR 1: EDUCACTIONAL PROGRAM			
Measure 1a **Implementation of Educational Program**	**Is the school implementing the material terms of the educational program as defined in the charter and performance certificate?**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: The school implements the material terms of the mission, vision, and educational program in all material respects, and the implementation of the educational program reflects the essential elements outlined in the charter and performance certificate. A cohesive professional development program is utilized.		25	
	Partially Meets Standard: The school partially implements the material terms of the mission, vision, and educational program. However, implementation is incomplete, not cohesive, inconsistent, unclear, and/or unsupported by adequate resources and professional development.		15	
	Does Not Meet Standard: The school has deviated from the material terms of the mission, vision, and/or essential elements of the educational program as described in the performance certificate, without an approved amendment, such that the program provided differs substantially from the program described in the charter and performance certificate.		0	
				0
Notes				

Measure 1b **Educational Requirements**	**Is the school complying with applicable educational requirements?**	**Result**	**Points Possible**	**Points Earned**
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to educational requirements, including but not limited to: Instructional time requirements, graduation, and promotional requirements, content standards including the Common Core State Standards, the Idaho State Standards, state assessments, and implementation of mandated programming related to state or federal funding.		25	
	Partially Meets **Standard:** The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to educational requirements; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to educational requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

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Measure 1c	Is the school protecting the rights of students with disabilities?	Result	Points Possible	Points Earned
Students with Disabilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to: Equitable access and opportunity to enroll; identification and referral, appropriate development and implementation of IEPs and Section 504 plans; operational compliance, including provisions of services in the LRE and appropriate inclusion in the school's academic program, assessments, and extracurricular activities; discipline, including due process protections, manifestation determinations, and behavioral intervention plans; access to school's facility and programs; appropriate use of all available applicable funding.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 1d	Is the school protecting the rights of English Language Learner (ELL) students?	Result	Points Possible	Points Earned
English Language Learners				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to requirements regarding ELLs, including but not limited to: Equitable access and opportunity to enroll; required policies related to the service of ELL students; compliance with native language communication requirements; proper steps for identification of students in need of ELL services; appropriate and equitable delivery of services to identified students; appropriate accommodations on assessments; exiting students from ELL services; and ongoing monitoring of exited students.		25	
	Partially Meets Standard: The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of ELL students; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to requirements regarding ELLs; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

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	INDICATOR 2: FINANCIAL MANAGEMENT AND OVERSIGHT			
Measure 2a	**Is the school meeting financial reporting and compliance requirements?**	**Result**	**Points Possible**	**Points Earned**
Financial Reporting and Compliance				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial reporting requirements, including but not limited to: Complete and on-time submission of financial reports including annual budget, revised budgets (if applicable) periodic financial reports as required by PCSC, and any reporting requirements if the board contracts with an Education Service Provider; on-time completion and submission of the annual independent audit and corrective action plans (if applicable); and all reporting requirements related to the use of public funds.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial reporting requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial reporting requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 2b	**Is the school following General Accepted Accounting Principles (GAAP)**	**Result**	**Points Possible**	**Points Earned**
GAAP				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit, including but not limited to: An unqualified audit option, an audit devoid of significant findings and conditions, material weakness, or significant internal control weaknesses; and an audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit. Any matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits failure to comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 2c	**Is the school successfully enrolling the projected number of students?**	**Result**	**Points Possible**	**Points Earned**
Enrollment Variance				
	Meets Standard: Enrollment variance equaled or exceeded 95 percent in the most recent fiscal year.		25	
	Partially Meets Standard: Enrollment variance was between 90 and 95 percent in the most recent fiscal year.		15	
	Does Not Meet Standard: Enrollment variance was less than 90 percent in the most recent fiscal year.		0	
				0
Notes	Enrollment variance is calculated by dividing actual mid-term enrollment by the enrollment projection in the school's board-approved budget, as submitted to the SDE at the beginning of the fiscal year.			

INDICATOR 3: GOVERNANCE AND REPORTING

Measure 3a	**Is the school complying with governance requirements?**	**Result**	**Points Possible**	**Points Earned**
Governance Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board, including but not limited to: board policies; board bylaws; code of ethics; conflicts of interest; board composition; and compensation for attendance at meetings.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to governance by its board; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3b	**Is the board fulfilling its oversight obligations?**	**Result**	**Points Possible**	**Points Earned**
Board Oversight				
	Meets Standard: The school's board practices consistent, effective oversight of the school, including but not limited to frequent review of the school finances and academic outcomes. Board meeting agendas, packets, and minutes reflect competent oversight practices and actions to foster academic, operational, and financial strength of the school, including ongoing board training, policy review, and strategic planning. The school's board has adopted and maintains a complete policy book.		25	
	Partially Meets Standard: Some of the school board's oversight practices are underdeveloped, inconsistent, incomplete, or reflect a need for additional training. Board meeting agendas, packets, and minutes reflect meaningful efforts toward self-evaluation and improvement. The school's policy book may be substantially complete but require additional maintenance.		15	
	Does Not Meet Standard: The school's board fails to practice consistent, effective oversight of the school, and/or documentation of competent oversight practices and actions is not maintained. The school's policy book may be incomplete, unmaintained, or non-existent.		0	
				0
Notes				

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Measure 3c	Is the school complying with reporting requirements?	Result	Points Possible	Points Earned
Reporting Requirements				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities, including but not limited to: accountability tracking; attendance and enrollment reporting; compliance and oversight; and additional information requested by the authorizer.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3d	Is the school complying with public transparency requirements?	Result	Points Possible	Points Earned
Public Transparency				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency, including but not limited to: maintenance of its website, timely availability of board meeting minutes, and accessibility of documents maintained by the school under the state's Freedom of Information Act, Open Meeting Law, Public Records Law, and other applicable authorities.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency. Any instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3e	Is the school meeting employee credentialing and background check requirements?	Result	Points Possible	Points Earned
Credentialing & Background Checks				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to state and federal certification and background check requirements.		25	
	Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to state and federal certification and background check requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to state and federal certification and background check requirements; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

Measure 3f	**Is the school handling information appropriately?**	**Result**	**Points Possible**	**Points Earned**
Information Handling				
	Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information, including but not limited to: maintaining the security of student records under the Family Educational Rights and Privacy Act and other applicable authorities; storing and transferring student and personnel records; and securely maintaining testing materials.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the handling of information; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				
	INDICATOR 4: SCHOOL ENVIRONMENT			
Measure 4a	**Is the school complying with transportation requirements?**	**Result**	**Points Possible**	**Points Earned**
Transportation				
	Meets Standard: The school provides student transportation within its primary attendance area and materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to transportation.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or requirements of the performance certificate relating to transportation; and/or provides and incomplete form of transportation services. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to transportation; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board; and/or the school does not provide transportation.		0	
				0
Notes				
Measure 4b	**Is the school complying with facilities requirements?**	**Result**	**Points Possible**	**Points Earned**
Facilities				
	Meets Standard: The school materially complies with applicable laws, rules, regulations , and requirements of the performance certificate relating to the school facilities and grounds, including but not limited to: Americans with Disabilities Act, fire inspections and related records, viable certification of occupancy or other required building use authorization, and documentation of requisite insurance coverage. The school facility is clean, well-maintained, and adequate for school operations.		25	
	Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the school facilities and grounds. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board. Additional facility maintenance and/or updates have been recommended by DBS.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the school facilities and grounds; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board. The school facility may be in need of modification or repair required by DBS.		0	
				0

OPERATIONAL

	INDICATOR 5: ADDITIONAL OBLIGATIONS			
Measure 5a	**Is the school complying with all other obligations?**	**Result**	**Points Possible**	**Points Earned**
Additional Obligations				
	Meets Standard: The school materially complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein, including but not limited to requirements from the following sources: revisions to statute and administrative rule; requirements of the State Department of Education; and requirements of the accrediting body.		25	
	Partially Meets Standard: The school largely complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein. Matters of non-compliance, if any, are minor and quickly remedied, with documentation, by the governing board.		15	
	Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with all other material legal, statutory, regulatory, or contractual requirements contained in its charter contract that are not otherwise explicitly stated herein; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.		0	
				0
Notes				

INDICATOR 1: NEAR-TERM

		Result	Points Possible	Points Earned
Measure 1a	**Current Ratio: Current Assets divided by Current Liabilities**			
Current Ratio				
	Meets Standard: Current Ratio is greater than or equal to 1.1 OR Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's). *Note: For schools in their first or second year of operation, the current ratio must be greater than or equal to 1.1.*		50	
	Does Not Meet: Current Ratio is between 0.9 and 1.0 or equals 1.0 OR Current Ratio is between 1.0 and 1.1 and one-year trend is negative.		10	
	Falls Far Below Standard: Current ratio is less than or equal to 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1b	**Current Ratio: Cash divided by Current Liabilities**			
Cash Ratio				
	Meets Standard: Cash Ratio is greater than 1.0 OR Cash Ratio is equal to 1.0 and one-year trend is positive (current year ratio is higher than last year's).		50	
	Does Not Meet: Cash Ratio is between 0.9 and 1.0 OR Cash Ratio equals 1.0 and one-year trend is negative.		10	
	Falls Far Below Standard: Cash ratio is equal to or less than 0.9.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1c	**Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses minus Depreciation Expense/365)**			
Unrestricted Days Cash				
	Meets Standard: 60 Days Cash OR Between 30 and 60 Days Cash and one-year trend is positive. *Note: Schools in their first or second year of operation must have a minimum of 30 Days Cash.*		50	
	Does Not Meet: Days Cash is between 15-30 days OR Days Cash is between 30-60 days and one-year trend is negative.		10	
	Falls Far Below Standard: Fewer than 15 Days Cash.		0	
				0
Notes				

		Result	Points Possible	Points Earned
Measure 1d	**Default**			
Default				
	Meets Standard: School is not in default of financial obligations. Financial obligations include, but are not limited to: nonpayment, breach of financial representation, non-reporting, non-compliance, financial judgements, loan covenants, and/or tax obligations.		50	
	Does Not Meet: School is in default of financial obligations.		0	
				0
Notes				

	INDICATOR 2: SUSTAINABILITY			
Measure 2a	**Total Margin: Net Income divided by Total Revenue AND Aggregated Total Margins: Total 3-Year Net Income divided by Total 3-Year Revenues.**	**Result**	**Points Possible**	**Points Earned**
Total Margin and Aggregated				
3-Year Total Margin	**Meets Standard:** Aggregated 3-yar Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. *Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.*		50	
	Does Not Meet: Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".		30	
	Falls Far Below Standard: Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2b	**Debt to Asset Ratio: Total Liabilities divided by Total Assets**	**Result**	**Points Possible**	**Points Earned**
Debt to Asset Ratio				
	Meets Standard: Debt to Asset Ratio is less than 0.9.		50	
	Does Not Meet: Debt to Asset Ratio is between 0.9. and 1.0		30	
	Falls Far Below Standard: Debt to Asset Ratio is greater than 1.0		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Measure 2c	**Cash Flow: Multi-Year Cash Flow = Year 3 Total Cash - Year 1 Total Cash AND One -Year Cash Flow = Year 2 Total Cash - Year 1 Total Cash**	**Result**	**Points Possible**	**Points Earned**
Cash Flow				
	Meets Standard: Multi-Year Cumulative Cash Flow is positive and Cash Flow is positive each year OR Multi-Year Cumulative Cash Flow is positive, Cash Flow is positive in one of two years, and Cash Flow in the most recent year is positive. Note: Schools in their fist or second year of operation must have positive cash flow.		50	
	Does Not Meet: Multi-Year Cumulative Cash Flow is positive, but trend does not "Meet Standard"		30	
	Falls Far Below Standard: Multi-Year Cumulative Cash Flow is negative.		0	
				0
Notes				

Measure 2d	**Debt Service Coverage Ratio: (Net Income + Depreciation + Interest Expense)/(Annual Principal, Interest, and Lease Payments)**	**Result**	**Points Possible**	**Points Earned**
Debt Service Coverage Ratio				
	Meets Standard: Debt Service Coverage Ratio is equal to or exceeds 1.1		50	
	Does Not Meet: Debt Service Coverage Ratio is less than 1.1		0	
				0
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.			

Appendix C: Pre – Opening Requirements

New School Pre-Opening Requirements

The following items must be collected by the PCSC for your school's files.

ITEM	COLLECTION BY PCSC
Performance Certificate Executed	
Bylaws Executed	
Articles of Incorporation	
Conflict of Interest and/or Code of Ethics Statement	
Facility Lease or Mortgage Executed	
Annual Board Approved Budget	
501c3 Approval Letter	
Org Chart	
Board Member and School Leader Contact Information (PCSC Dashboard)	
Emergency Incident Team Communication Plan	

The school has successfully completed all of the tasks as outlined in the accompanying task lists.

ITEM	PCSC Verification
Enrollment is Sufficient for Operation	
Meeting 1 Tasks (see "Pre-Opening Checklist", "Meeting 1 - October" tab)	
Meeting 2 Tasks (see "Pre-Opening Checklist", "Meeting 2 - December" tab)	
Meeting 3 Tasks (see "Pre-Opening Checklist", "Meeting 3 - February" tab)	
Meeting 4 Tasks (see "Pre-Opening Checklist", "Meeting 4 - April" tab)	
Meeting 5 Tasks (see "Pre-Opening Checklist", "Meeting 5 - June" tab)	
Final Tasks and Facilities Visit (See "Pre-Opening Checklist", "Final Facilities Visit - August" tab)	

Certificate is hereby given that all facts and representations on this assurance document are true and correct.

Printed Name and Title of Authorized Charter School Representative

Signature Date

Printed Name of PCSC Representative

Signature Date

Appendix D: Charter

Pinecrest Academy of Idaho

A proposed public charter school serving students in Kindergarten-8th Grade

Proposed Opening: August 2020
Located: Twin Falls School District
Submission Date: August 1., 2019

Connie Stopher
richconn@isu.edu

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Narrative

EXECUTIVE SUMMARY

Educational Program
Pinecrest Academy of Idaho's (PAI) educational program is modeled after specific innovative learning methods and strategies that have proven successful in raising student learning and achievement and are constant across the Pinecrest system. PAI will provide all students with a core curriculum of ELA, math, social studies, science, and a rich array of special and elective courses in fine arts, health, physical education, languages, and technical curricula encompassing the STEAM focus of the school.

Mission

Pinecrest Academy of Idaho unites the community to prepare students for college and career.

Vision

At Pinecrest Academy of Idaho, scholars perform at the highest level on all academic measures.

Financial & Facilities Plan
The Pinecrest Academy of Idaho (PAI) Board will oversee all aspects of the fiscal management of the school and are dedicated to providing an enhanced educational experience by furnishing students with an academically challenging and personally meaningful learning environment with an emphasis on arts integration. The charter school budget will serve as the financial plan of operation for the charter school and will include estimates and purpose of expenditures for a given period and the proposed means of financing the estimated expenditures.

Board Capacity & Governance Structure
The governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The policies, procedures, powers, and duties, by which the board will operate, including specific member powers, are detailed in the attached bylaws.

Student Demand & Primary Attendance Area
PAI's target attendance area will most likely focus on our families and students in the Twin Falls, Idaho area. Based on these 2018 ISAT results, only 50.8% of the students in the community are proficient in English language arts (ELA), while only 45.6% are proficient in mathematics and 50.1% are proficient in science. What's more, these proficiency results are even poorer when examining specific student subgroups, such as: Hispanic/Latino students and students that participate in the Free and Reduced Lunch program.

School Leadership & Management
The school principal, hired by the board, will be responsible for all aspects of day-to-day administration of the school within the scope of operating policies, procedures, and budgetary functions as adopted and approved by the governing board. The principal makes all school-based decisions and establishes procedures for the day-to-day operations of the school.

I. EDUCATIONAL PROGRAM

Pinecrest Academy of Idaho's (PAI) educational program is modeled after specific innovative learning methods and strategies that have proven successful in raising student learning and achievement and are constant across the Pinecrest system. These include, but are not limited to:

- A course guide, lesson plans, and syllabi based on the Idaho Content Standards and national STEAM Standards.[1]
- A hybrid, standards-based approach to grading and communication of grades.
- A thematic approach to integrate core areas of study such as: mathematics, reading, language arts, writing, science, and social studies.
- A differentiated approach through blended learning to enhance student learning and goal tracking.
- Appropriate assessments to measure learning (screening, progress monitoring, and diagnostic).
- Data-driven, high-quality differentiated instruction for all students.
- Supplemental programming for student advancement and remediation.
- Research-based instructional practices (i.e., Randy Sprick's Safe and Civil School & CHAMPS, Kagan Cooperative Learning Structures, Blended Learning, and the Components of an Effective Lesson).
- Professional development and support for teachers with research-based practices, advanced curriculum, and technology integration.
- Weekly grade level meetings to review common pacing calendars and lesson plans.
- Data Days and Staff Development Days for ongoing review of campus and system-wide data and professional development workshops.
- Before and after school tutoring for remediation and acceleration.
- Targeted interventions for struggling students performing below grade level.

Student proficiency is a fundamental need and the basis for assimilation and mastery of all curriculum to be implemented. Thus, teachers and staff will have training in and access to instructional materials to reinforce academic skills in all courses. Some of these reinforces include: Structured Independent Reading, Reciprocal Teaching, Vocabulary Development, Cooperative Groups, and Graphic Organizers, to name a few.

In addition, the School will increase learning opportunities for all students through careful, frequent monitoring and assessment of student performance. Emphasis will be placed on low performing students, beginning with identification of those not making adequate progress and/or not demonstrating mastery of the Idaho Content Standards, as adopted. Differentiated instruction and other appropriate measures for targeted instruction will then be instituted for these students, and those who are not performing at grade level will be placed on a Progress Monitoring Plan.

The School's curriculum will serve students of all ability levels and aim for mastery of the Idaho Content Standards for all students. Using data from assessments and other applicable state and district assessments, PAI will measure its own progress in meeting the needs of its student

[1] The Center on Standards & Assessment Implementation. WestEd. CRESST. URL: https://www.csai-online.org/collection/2810 ; last accessed October 2019.

population. The school will annually develop measurable learning objectives over the major subject areas, to target student learning and development needs in its annual *School Improvement Plan (SIP).* Idaho Content Standards, as adopted, that are not mastered will be identified, and appropriate measures for remediation will be instituted. Students in need of remediation and students with special learning needs will have access to supervised study time and tutoring after school (and possibly on Saturdays, as well) to accelerate their progress.

PAI will maintain a commitment to the instruction of the Idaho Content Standards and to the mastery of these standards by the students. Additionally, it will encourage teachers to use a variety of instructional methods to deliver the coursework, with an emphasis on infusing STEAM activities into daily instruction. While setting high academic expectations for all students, PAI will provide students the means to reach their academic goals through differentiated instruction methodology and hands-on, inquiry-based investigations in their coursework.

Additionally, educators will be encouraged to exercise freedom in delivery of the content and experiment with new instructional techniques in meeting with the needs of their students. All students learn differently, and teachers will be required to adapt their teaching styles to fit the learning needs of their populations. This student-centered approach ensures the curriculum will be accessible to all students, regardless of level.

Thus, academic excellence and performance will drive teachers' pedagogical efforts and their commitment to students will manifest itself in all aspects of PAI. Teachers will deliver instruction to address the respective Idaho Content Standards by employing effective research-based strategies such as critical-thinking skills, hands-on learning, inquiry-based research projects, science experimentation, technology rich environments, Reciprocal Teaching, and high expectations for all students.

The choice to replicate a successful school system, instead of create an entire curriculum and school model, is responsive to the National Association of Charter School Authorizers' guidance.[2] Academic excellence as well as financial and organizational performance are the two leading indicators identified by NACSA for use by charter school authorizers in measuring the historical success of the charter school network proposed for replication and by extension the school applicant's potential success. The Pinecrest Academy network of schools answers these requirements sufficiently.

Like that of the schools it will replicate, the Pinecrest Academy of Idaho's educational philosophy is grounded in the expectation of increasing learning opportunities and raising the academic achievement of all of its students through high expectations and character development.

[2] National Association of Charter School Authorizers. *Replicating Quality.* January 2014. URL: https://www.qualitycharters.org/wp-content/uploads/2016/01/ReplicatingQuality_ExecutiveSummary.2014.01.pdf; last accessed October 2019.

Educational Philosophy

The educational philosophy of Pinecrest Academy of Idaho is grounded upon increasing learning opportunities, raising academic achievement, and promoting civic responsibility. The educational program will draw upon Dr. Theodore Sizer's *Coalition of Essential Schools* and its ten principles.[3]

A sampling of the integration of the ten principles into the PAI educational philosophy includes:

- Principle 1. Learning to use one's mind well. PAI will focus on helping its students learn to use their minds well.
- Principle 2. Less is more, depth over coverage. The PAI faculty will use the Idaho Content Standards to focus on each student mastering a limited number of essential skills and areas of knowledge. Curricular decisions will be guided by the aim of thorough student mastery and achievement rather than by an effort to merely cover content.
- Principle 3. Goals apply to all students. While the goals of each student may vary, PAI will strive for each student to maximize his or her fullest potential.
- Principle 4. Personalization. Teaching and learning will be personalized at every level. The school principal and faculty will provide input into the decisions about the details of the course of study, the use of students' and teachers' time, and the choice of teaching materials and specific pedagogies.
- Principle 5. Student-as-worker, teacher-as-coach. Woven into the school program will be opportunities to stretch students' individual learning habits. The PAI faculty's will balance direct instruction with problem-based learning opportunities to provoke students to be independent learners.
- Principle 6. Demonstration of mastery. Teaching and learning at PAI will be documented and assessed with tools based on student performance of real tasks. Students not at appropriate levels of competence will be provided with intervention and support to assist them to meet grade level standards. Multiple forms of evidence, ranging from ongoing observation of the learner, to completion of specific projects will be incorporated to better understand the learner's strengths and needs. Students will also be recognized for their mastery through various award assemblies and activities.
- Principle 7. A tone of decency and trust. The tone of PAI will explicitly and self-consciously stress values of expectation, trust, and decency. Incentives appropriate for students and teachers will be emphasized. Parents will be key collaborators and vital members of the school community.
- Principle 8. Commitment to the entire school. The PAI principal and teachers will perceive themselves as generalists first (teachers and scholars in general education) and specialists (experts in a particular discipline) second. Staff should expect multiple obligations (teacher-counselor-manager) and a sense of commitment to the entire school's philosophies.
- Principle 9. Resources dedicated to teaching and learning. The PAI budget will provide for student schedules that promote personalization, time for collective planning by teachers, and competitive salaries for staff.

[3] Coalition of Essential Schools. *Common Principles.* http://essentialschools.org/common-principles/. Last retrieved October 2019.

- Principle 10. Democracy and equity. PAI will demonstrate nondiscriminatory and inclusive policies, practices, and pedagogies. It will model democratic practices that involve all the school's stakeholders. PAI will honor diversity and build on the strength of its community.

PAI will maintain Pinecrest Academy's underlying purpose, which is academic excellence. The emphasis in the Pinecrest Model is a "push and pull" method of preparing students to maximize upon their potential, wherein all students are pushed together with the most challenging academic program they can handle. Simultaneously, students who are struggling can be pulled together for remediation through supportive learning strategies that extend the classroom learning experience instead of replacing it with remedial material. As a result, students will be better prepared for success in middle and high school (and subsequently college) coursework. These and other Pinecrest best practices (described through this application) are established pillars of the Pinecrest Academy and derived from eighteen years of experience with innovative board members, parents, and educators working together for a common purpose.

Pinecrest schools meet high standards of student achievement through the delivery of a rigorous and relevant curriculum with emphasis on mastery of benchmarks aligned to the Common Core State Standards (CCSS). The Pinecrest Model has already been adapted to both the Florida and Nevada State Standards frameworks. Accordingly, PAI will combine the best practices developed by the Pinecrest network in translating the CCSS standards in those states when making the adjustments necessary to align the Pinecrest Model with the Idaho Content Standards. The standards encompass all content areas, including science, social studies, music, visual arts, health, physical education, and computer and technology. These standards provide a consistent, clear understanding of what students are expected to learn at each grade level. The framework is structured to prepare students for college, the workforce, and to be lifelong learners and responsible citizens.

PAI will provide all students with a core curriculum of ELA, math, social studies, science, and a rich array of special and elective courses in fine arts, health, physical education, languages, and technical curricula encompassing the STEAM focus of the school. Teachers and other support staff will use data from all available assessments to develop and target instruction to meet the needs of all students so that each child can realize his or her highest potential. Units of instruction within and across all grade levels will provide a vertically articulated curriculum framework that scaffolds the skills and knowledge required for success and concomitantly provides teachers with continuous feedback on student progress.

Students who are struggling or are below grade-level will be identified; remediation courses, as well as prescriptive classroom-based strategies, will target gaps. Teachers and other support staff, from all available sources, will drive targeted instruction. The goal of the academic program is to holistically meet the needs of all students, maximizing each child's talents and potential and remediating individual deficiencies.

The Pinecrest Model will provide a solid academic foundation for students to have success at subsequent levels. Cognitive science research in mathematics and reading underscores the emphasis on meaning and understanding, beginning in the early elementary grades. Thus, much

of the curriculum is centered on this approach as well as remediation when necessary. Instruction will emphasize developmental learning while providing differentiated strategies (supports and interventions for struggling students and students with special needs as well as enrichment for advanced learners).

Student Academic Achievement Standards

The School's educational goals for improving student achievement each year aim to increase student proficiency from year to year and that remain competitive with district/state achievement targets and to increase student performance and learning gains annually. The following performance goals were developed with the rationale of reaching the average proficiency levels of the Pinecrest Academy K-8 school model as compared to district averages.

Pinecrest Academy schools in Nevada[4] and Florida[5] are currently yielding higher proficiency rates than the surrounding area schools while serving higher rates of minority and economically disadvantaged student populations. Thus, by replicating and implementing the same best practices and curriculum in serving the target student population, the School expects to have a similar and/or higher rates of academic growth and improvement as the Pinecrest schools beyond the first year of inception.

Kindergarten through 2nd Grade Reading/Math

Baseline: Baseline scores in grades K-2 will be determined using the iReady Diagnostic assessments administered in Aug/Sept.

GOAL—80% of students in grades K-2 will have made learning gains in Reading and Mathematics as measured by results on iReady Diagnostic (pre- and post-tests) administered in the fall and spring of the inaugural school year.

Third through 6th Grade:

Incoming Baseline of student academic achievement – The expected incoming baseline for grades 3-8 in Year 1 was determined using the average performance of students in the Twin Falls District for the 2018 assessment year. The rationale is that the School's incoming students are presumed to be representative of the demographics of that District. Because the incoming baseline projected here may not actually be the exact student population in year 1 of the school, the goals and projections below establish the basis for academic growth and improvement that students are expected to show each year but will be realigned once the school collects actual baseline data after the first year of operation.

- ELA
  - **Baseline:** 49.71% - Twin Falls District Grade K-8 ELA Average on the ISAT
  - **GOAL—At least 60% of students in Grades K-8 will meet high standards in ELA**, as evidenced by scoring proficient or higher on the ISAT ELA within the first year of operation. In years 2 through 5, the cohort will grow 2% annually.

[4] See Nevada Report Card. http://nevadareportcard.com/. Last retrieved June 25, 2019.

[5] See Florida Department of Education http://www.fldoe.org/accountability/assessments/k-12-student-assessment/results/2017.stml#ARR Last retrieved June 25, 2019.

- **Rationale:** 77% of Pinecrest Academy students in grades 3-8 scored proficient or higher on the FSA ELA during the 2018 testing year.

- Mathematics
  - **Baseline:** 44.71% - Twin Falls District Grade K-8 Mathematics Average on the ISAT
  - **GOAL: At least 60 % of students in grades K-8 will meet high standards in Mathematics**, as evidenced by scoring proficient or higher on the ISAT in Mathematics within the first year of operation. In years 2 through 5, the cohort will grow 2% annually.
  - **Rationale:** 81% of Pinecrest Academy students in grades 3-8 scored proficient or higher on the Mathematics during the 2018 testing year.

- Science
  - **Baseline:** 53.55% - Twin Falls District Grades 5th and 7th Science Average on the ISAT
  - **GOAL—At least 60% of students in Grades 5th and 7th will meet high standards in Science**, as evidenced by scoring proficient or higher on the ISAT Science within the first year of operation. In years 2 through 5, the cohort will grow 2% annually.
  - **Rationale:** 62% of Pinecrest Academy students in grades 5th and 7th scored proficient or higher on the FSA Science Assessment during the 2018 testing year.

- Learning Gains
  - GOAL: At least 60% of students in grades K-8 will make learning gains on ISAT ELA by:
    - Improving one or more achievement levels from one year to the next; or
    - Level 1 and 2 students increasing their score from one subcategory to a higher subcategory; or
    - Level 3 students maintaining a Level 3 or improving their score by at least 1 point from one year to the next; or
    - Level 4 students: Maintaining a level 4 from one year to the next.

  - GOAL: At least 60% of students in grades K-8 will make learning gains on ISAT Math by:
    - Improving one or more achievement levels from one year to the next; or
    - Level 1 and 2 students increasing their score from one subcategory to a higher subcategory; or
    - Level 3 students maintaining a Level 3 or improving their score by at least 1 point from one year to the next; or
    - Level 4 students: Maintaining a level 4 from one year to the next.

Key Educational Design Elements, Curricula, Tools, & Instructional Methods

Instrumentation: Select universal screeners and standardized assessments are used by Pinecrest Academy of Idaho to monitor students' academic progress, academic performance, and trend analysis. Commercially appropriate assessments, instruments, and curriculum will be used to

assist in the development of daily lessons, weekly units of instruction, and short and long range instructional goals. Pinecrest Academy of Idaho will use one or more of the following assessments: ISAT (Idaho Standards Achievement Test), Idaho Reading Indicator, Measure of Academic Progress (MAP), iReady, World-Class Instructional Design and Assessment (WIDA), PSAT, SAT, and Idaho Alternative Assessment (IDAA) to provide insight into further classroom instruction. Teacher created informal assessments will be used to regularly monitor student progress.

Data Collection: Pinecrest Academy of Idaho teachers will screen students at the beginning of the year to determine current levels of academic performance. Once the data from these screeners have been analyzed and interpreted, instructional objectives will be determined. Along with state mandated assessments, a variety of data points will be collected. These data points will be assembled virtually and shared in grade-level meetings along with other student performance artifacts for the purposes of reporting individual student growth and progress for teacher and administrative use in creating meaningful and purposeful instructional activities to meet the needs of all students.

Data Analysis: Pinecrest Academy of Idaho will form data teams comprised of grade level teachers and groups of instructors who teach similar content such as math, ELA, science, and social studies. The purpose of these data teams is to assist in monitoring student progress. Data teams will compile progress-monitoring data on a quarterly basis (or during interim testing and when evaluating instructional impact) and will disaggregate the results for cohorts. Data teams will meet monthly to evaluate data and correlate to instructional decision, review progress-monitoring data at grade level and classroom level to identify students and their academic levels; identify professional development to enhance students' achievement levels; collaborate, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills; as well as facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

Instructional Changes and Interventions (Corrective Actions) based on Data:
Administrators and data teams will use data analysis to collaboratively develop instructionally focused calendars with timelines for addressing targeted strands as denoted in assessed benchmarks. Instructors will adjust their instruction, monitor student progress, and select appropriate classroom activities to work on student deficiencies and to guide differentiated instruction.

Students who are identified as academically "at risk" via the universal screening process and who are not already identified with an IEP, will be referred to Pinecrest Academy of Idaho's Student Academic Behavioral Intervention Team (SABIT). Pinecrest Academy of Idaho's SABIT team will be comprised of a staff member from every general education grade level and the special education teacher or designee selected by the teacher. The SABIT team notifies the parent(s) that his/her/their child will be entering the SABIT program, which will provide interventions in all areas of the student's deficiencies.

Once the student is identified, the SABIT team writes goals for the student in the area of deficiency, provides intensive interventions, and monitors weekly progress. The interventions

and progress-monitoring tool provided would be interventions and tools that have been validated through research and determined effective by the SABIT team. The SABIT team reviews the student's progress according to the progress-monitoring data every four weeks and adjusts instruction when a student is not showing progress through trend analysis. If the student is not showing progress after every four weeks of data analysis, the teacher attempts a variety of intensive interventions and strategies designed to facilitate the child's learning within that classroom. Interventions may be intensified by providing more daily or weekly time on the intervention, providing interventions in a smaller group setting or individualized, or by compiling a combination of intervention that may work.

Pinecrest Academy of Idaho has adopted researched base core curriculum to support the academic program at the school. Below is an explanation of each program to be implemented:

Content Area	Core Curriculum	Supplemental Curriculum
Mathematics	**Everyday Math:** (K-5) Elementary teachers and 5th grade teachers will implement the Everyday Math Curriculum based on Nevada Academic Content Standards, using the program consistently and uniformly across all campuses. https://connected.mcgraw-hill.com/connected/login.do **i-Ready & Ready Classroom:** (K-5) materials have been accepted as ICSs aligned supplements. http://www.curriculumassociates.com/products/ready-common-core-overview.aspx https://www.teacher-toolbox.com/ **SpringBoard:** Grades 6-8 will use the Math Springboard Curriculum based on Nevada Academic Content Standards and use the program consistently and uniformly across all campuses. https://pinecrestnv.springboardonline.org/ebook/login	**Calendar Routine & Math Message** (K-2 optional): Teachers in first and second grade may shift away from traditional calendar routines to better meet the needs of their class. These routines establish repetitive practice of essential mathematical skills pertaining to the grade level and real world. **Math Made Fun!** (K): An engaging math supplement that includes daily differentiated lessons, pre- and post-assessments, and hands-on centers. **Number Talks** (K-5): Number talks activities are meant to develop and review number sense concepts. http://www.insidemathematics.org/classroom-videos/number-talks **ST Math Test Drives**: Teachers will incorporate these tools into whole and/or small group instruction, whenever possible, to promote the link between blended learning programs, curriculum, and the ICS. https://web.stmath.com/entrance/jjiconsole.html **Achieve the Core:** https://achievethecore.org/category/854/mathematics-lessons
Reading	**Wonders Reading Series:** Grades K-5 will implement the Wonders Reading Series based on Nevada Academic Content Standards and use the program consistently and uniformly	**Novels & Supplements**: Grades 2-8 will use non-fiction reading material and novel sets) based on Idaho Content Standards. Novel studies should be standards-based and focused on student application of the standards through

	across the campus. https://connected.mcgraw-hill.com/connected/login.do **iReady**: Grades 2-5 will implement the iReady Classroom curriculum based on Nevada Academic Content Standards and use the program consistently and uniformly across the campus. https://teacher-toolbox.com/toolbox **SpringBoard Curriculum**: Grades 6-8 will use the ELA Springboard Curriculum based on Nevada Academic Content Standards and use the program consistently and uniformly across all campuses.	the reading. Pinecrest teachers do not simply teach novels. They teach standards through novels. Resources used to teach novels are expected to be standards-based, rigorous, of high quality, and preferably not a packet.
Science	**Houghton Mifflin Science Fusion:** *Fusion* provides informational texts along with many hands-on labs. Teachers and students have access to *ThinkCentral,* which provides interactive labs. **Pearson *Interactive Science:*** Program provides a variety of interactive tools to help support, extend, and enrich classroom instruction. **Pearson *Interactive Science* (pacing Adv)*:*** Interactive Science embodies the 21st century learner by infusing the core subjects and themes throughout the program; provides continuum of accelerated intervention strategies **Physical Science: *CPO Science:*** CPO Science- rich in STEM connections and aligned with NGSS **Biology: Pearson Prentice Hall *Miller & Livine Biology:*** Biology- text that will prepare students for advanced coursework.	Gizmos Zaner-Blossser *I Read to Write Science Weekly,* Brain Pop, *Think Central* Gizmos, Brain Pop Gizmos, Khan Academy, Brain Pop

Reading/English Language Arts (ELA)

The school's English Language Arts program is to provide instruction for mastery of the ICS, making students college and career ready at the conclusion of their high school career as well as 21st century literate. Teachers will provide instruction in Language Arts to promote academic excellence in Reading, Writing, Speaking & Listening, and Language. The grade specific ICS will guide instruction at each grade level and help ensure that students gain adequate exposure to an increasingly complex range of texts and tasks as they progress from grade to grade. The courses will cover the application of the writing process, effective use of speaking and listening and language skills, and higher-order critical thinking and literacy skills in preparation for overall post-secondary studies.

To build a foundation for college and career readiness in language, students must gain control over many conventions of Standard English grammar, usage, and mechanics as well as learn other ways to use language to convey meaning effectively. The school will provide students with increasingly complex texts to aide student growth in reading comprehension and expose them to complex vocabulary. Similarly, students will be given writing tasks that engage them to use writing as a way of offering and supporting opinions, demonstrating understanding of the subjects they are studying, and conveying real and imagined experiences and events. Students will plan, revise, edit, and publish their writing. Via the writing process, students will appreciate that a key purpose of writing is to communicate clearly to an external audience and subsequently they will begin to adapt the form and content of their writing to accomplish a particular task and purpose.

Students will master reading, writing, and verbal skills through continuous infusion of literacy skills in all subject areas. The ELA program will include instructional strategies for students reading at grade level or higher, as well as for students who are reading below grade level. The program emphasizes critical and creative thinking skills through instruction aligned to the Idaho Content Standards. Lessons will be based on broad topics covering the reading process, literary analysis, the writing process, communication, information and media literacy.

Students will also engage in research projects as a means to develop the capacity to build knowledge on a subject and to respond analytically to literary and informational sources. To meet these goals, teachers will be expected to provide students significant opportunities and time for writing and producing numerous pieces over short and extended time frames throughout the year. Through Language Arts, students will also be required to develop a range of oral communication and interpersonal skills through whole group discussions as well as individual, partnered and small group presentations. Through these, students engage in contributing accurate, relevant information, responding to and developing what others have said, making comparisons and contrasts, and analyzing and synthesizing a multitude of ideas through various language arts domains.

Students will receive 90 minutes of consecutive, uninterrupted daily instruction in Reading/Language Arts. The School will follow the state standards in the instruction of Reading using placement procedures for Intensive Reading and following the same frequency of delivery and timelines for progress monitoring at all Tiers of instruction. The school will use interventions; carefully selected supplemental instructional materials grounded in scientifically based reading research and progress monitoring tools proven successful at the Pinecrest schools being replicated. Students, who have been identified through the RtI/MTSS process as Tier 2, will receive a minimum of 30 minutes of uninterrupted daily immediate intensive intervention (iii) in addition to instruction in the 90-minute block. Individual intervention beyond the initial block and iii is required for students, which have been identified through the RtI/MTSS process as Tier 3. Students in need of immediate intensive intervention may be scheduled for a minimum of an additional 30 minutes daily during the school day or afterschool.

English Language Learners (ELLs) will have the same instructional time as non-ELLs for language arts/reading. Students with Disabilities (SWD) will have the same instructional time (90 minutes of uninterrupted daily instruction) in reading/language arts only within a single

instructional setting. The general education classroom will be the first placement consideration for scheduling and providing access to these courses for students with disabilities.

K-5 instruction in language arts includes English, reading process, literary analysis, writing process and applications, communication, information and media literacy. Student mastery of the basic skills, including cursive writing, will be in accordance with the criteria established by current Idaho requirements and frameworks. Key strategies include:

Universal Design of Learning: used as a guide to instructional design and delivery in all curriculum development. Universal Design of Learning is a framework for flexible, differentiated instructional approaches that includes flexible methods for presentation, expression and active learning, and student engagement, so all students (e.g., students with disabilities, ELLs) can participate fully in core instruction.

Centers/Differentiated Instruction - Reading centers will be set up throughout the classroom in various areas that allow students to work independently or in a small group setting using instructional materials to explore and expand their literacy. During this time, students are engaged in a variety of activities that reinforce and extend learning without the assistance of the classroom teacher. Students will practice reading, writing, speaking, listening, and working with letters and words. Manipulatives such as magnetic letters and sound letter cards are used to increase active participation and provide additional guided practice through multi-sensory approaches. For example during:

Guided reading center, students work with the teacher to read and practice the weekly reading strategies and skills using text at their level.
Writing center, students are practicing their writing skills related to the week's writing focus. Students are moving through the writing process at their own pace.
Test prep center, students are participating in practice of reading skills and strategies relevant to their grade level grade reading. Students work independently and alongside a teacher when it is time to review the content.
Technology center, students use technology such as Reading Plus and receive reading enrichment that challenges them according to their reading rate and comprehension level.

The grade specific standards will guide instruction at each grade level and help ensure that students gain adequate exposure to an increasing complex range of texts and tasks as they progress from grade to grade. Using pacing guides for instruction, the school's curriculum will cover the standards within each of the clusters in each strand.

Grades 6-8 Courses: Students will be required to successfully complete three middle school annual courses in Language Arts, which emphasize literature, composition, and technical text. The following ELA courses will be offered:

Intensive Reading: Courses will be in addition to the required Language Arts courses in grades 6-8.

As part of the school's rigorous program, students who score below required proficiency levels on the FSA for English/Language Arts may be placed in an intensive reading course.

Instructional Materials: The school plans to use a mixture of board-adopted and teacher-selected instructional materials, including digital software and multimedia in the instruction of Reading/Language Arts to differentiate between the regular and advanced curriculum. The school commits to use these or other digital materials as appropriate for use by the charter school.

Research-Based Instructional Materials (ELA/Reading)

Wonders Reading Series: Grades K-5 will implement the Wonders Reading Series based on ICS and use the program consistently and uniformly across the campus. https://connected.mcgraw-hill.com/connected/login.do **iReady**: Grades 2-5 will implement the iReady Classroom curriculum based on ICS and use the program consistently and uniformly across the campus. https://teacher-toolbox.com/toolbox **SpringBoard Curriculum**: Grades 6-8 will use the ELA Springboard Curriculum based on ICS and use the program consistently and uniformly across all campuses.	**Novels & Supplements**: Grades 2-8 will use non-fiction reading material and novel sets) based on Idaho Content Standards. Novel studies should be standards-based and focused on student application of the standards through the reading. Pinecrest teachers do not simply teach novels. They teach standards through novels. Resources used to teach novels are expected to be standards-based, rigorous, of high quality, and preferably not a packet.

Writing

The writing standards focus mainly on text types, responding to reading, and research. To build a foundation for college and career readiness, students need to learn to use writing as a way of offering and supporting opinions, demonstrating understanding of the subjects they are studying, and conveying real and imagined experiences and events. The standards acknowledge the fact that whereas some writing skills, such as the ability to plan, revise, edit, and publish, are applicable to many types of writing, other skills are more properly defined in terms of specific writing types: arguments, informative/explanatory texts, and narratives. The expectation is that students learn to appreciate that a key purpose of writing is to communicate clearly to an external audience and they begin to adapt the form and content of their writing to accomplish a particular task and purpose. It is also important that students develop the capacity to build knowledge on a subject through research projects and to respond analytically to literary and informational sources. To meet these goals, teachers will be expected to provide students significant opportunities and time and to writing, producing numerous pieces over short and extended time frames throughout the year.

Teachers will deliver lessons that focus on the following areas:

Purpose, Focus, and Organization: These lessons will enable the student to write sustained and consistently focused within the purpose, audience, and task; and the student has a clearly stated controlling idea and effective organizational structure creating coherence and completeness.

Evidence and Elaboration: The main focus in this area is to provide additional resources to

enable students to elaborate within their responses providing thorough and convincing support/evidence for the controlling idea or main idea that includes the effective use of sources, facts, and details.

Conventions of Standard English: Additional lessons will focus on grammar usage and conventions both written and via the use of technological tools. This will enable students to respond demonstrating an adequate command of basic conventions.

Other primary instructional strategies include: **Kinesthetic Aids**- Prewriting and organizational skills are taught through the use of a graphic organizers; **RACE** -(restate, answer, cite and explain) responses will be expected from students to instill the need for evidence-based answers in alignment with the requirements outlined in the FSA writing rubrics; **RAFT** - essay writing that includes a role, audience, format and a topic, plus a strong verb; **SPADE** *(Survey, Predict, Annotate + Analyze, Additional Reads, Dissect Questions, Evidence*) reading strategy for teachers to use to improve reading comprehension.

Research-Based Instructional Materials (Writing)
Wonders Writing and Jane Schaffer: Grades K-1 will implement the Wonders Reading Series in conjunction with Jane Schaffer writing strategies. All lessons will be based on Idaho Content Standards. Implementation will happen consistently and uniformly across all campuses.

Ready Writing/Wonders and Jane Schaffer: Grades 2-5 will implement the Ready Writing curriculum in conjunction with Jane Schaffer writing strategies. All lessons will be based on Idaho Content Standards. Teachers may use whichever elements of the program are available at their respective campus to teach the Idaho Content Standards and support Wonders Reading.

SpringBoard and Jane Schaffer: Grades 6-8 will implement SpringBoard in conjunction with Jane Schaffer writing strategies, based on Nevada Academic Content Standards. Implementation will happen consistently and uniformly across all campuses.

In grades K-5 students will receive 150 minutes of weekly instruction with a minimum of 30-minute instructional blocks. For Advanced Classes in 6-8: *SpringBoard* activities and Writing Workshops will deepen students' knowledge of writing process, types, and purposes so that students can produce clear and coherent writing ready for publication. The Embedded Assessments and Writing Workshops provide a comprehensive writing curriculum to foster effective teaching and learning to ensure that all students are prepared for the writing demands of high-stakes state assessments, Advanced Placement courses and exams as they progress unto high school.

Mathematics
Students will receive 60 minutes of consecutive and uninterrupted, daily instruction in mathematics. Students with disabilities will have the same instructional time as their non-disabled peers. The required program of study for Mathematics is aligned to state requirements. The School will develop students understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. The cultivation of these skills will help students develop numerical literacy, wherein they will have acquired the

mathematical knowledge, problem-solving ability, and communication skills required to excel at or above grade level expectations.

The School's mathematics curriculum intends to develop students' understanding of mathematical concepts as well as their ability to engage mathematics to reason, communicate, and problem solve making them able to remain competitive in an ever changing, fast-paced and technology-rich society. Using the curriculum Pacing Guides, teachers will be able to plan for mathematics lessons that meets the ICS and achieve at minimum a year's worth of learning for each student covering the Mathematics Standards under each domain (Counting and Cardinality; Operations and Algebraic Thinking; Number and Operations in Base of Ten; Measurement and Data; Geometry and Number and Operations – Fractions).

In grades 6-8, the ICS describe the mathematical skills and concepts all students need for success in college and careers and are organized by grade level in the following domains: Grade 6/7: Ratios and Proportional Relationships, The Number System, Expressions and Equations Geometry, Statistics and Probability; Grade 8: The Number System, Expressions and Equations, Functions, Geometry, Statistics and Probability.

The Standards for Mathematical Practice describe the characteristics of mathematically proficient students. These standards describe how students should use mathematics and provide a mechanism through which students engage with and learn mathematics.

Mathematical Practices:
1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning for of others.
4. Model with Mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

The Mathematical Practice Standards remain the same at each grade level; however, students will engage with and master new and more advanced mathematical ideas as they progress through each grade level. Accordingly, the Practice Standards will be taught and practiced in conjunction with the Content Standards at each grade level.

<u>K-5 Centers/Differentiated Instruction</u> -Teachers will use varying methods of instruction to address diverse learning styles. Examples are as follows:
Classroom is arranged to enable active engagement by all students:
- Whole-group instruction
- Teacher-led small groups instruction (based on data and depending on student need)
- Cooperative learning groups
- Independent student centers

Sample Math Centers – The number of students in each group may vary based on understanding

of concept. If a student is struggling with daily concept the teacher may provide scaffolding and support through:

- Reteach - worksheets for better understanding
- Enrichment- teacher provides worksheet that "level up" concept
- Mathletics- challenges students' based on level and allows students to choose a concept to practice
- Mathematics "print rich environment" - math word walls and bulletin boards will reflect taught and current mathematics topics

Grades 6-8 Courses: Students will be required to successfully complete three middle school annual courses in Mathematics.

Instructional Materials: The School plans to use standards-aligned instructional materials, including digital software and multimedia in the instruction of Mathematics. The school commits to use these or other digital state-adopted materials as approved by the district/state for use by the charter school.

Research-Based Instructional Materials (Mathematics)

Core Curriculum	Supplemental Curriculum
Everyday Math: (K-5) Elementary teachers and 5th grade teachers will implement the Everyday Math Curriculum based on ICS, using the program consistently and uniformly across all campuses. https://connected.mcgraw-hill.com/connected/login.do **i-Ready & Ready Classroom:** (K-5) materials have been accepted as ICSs aligned supplements. http://www.curriculumassociates.com/products/ready-common-core-overview.aspx https://www.teacher-toolbox.com/ **SpringBoard:** Grades 6-8 will use the Math Springboard Curriculum based on ICS and use the program consistently and uniformly across all campuses. https://pinecrestnv.springboardonline.org/ebook/login	**Calendar Routine & Math Message** (K-2 optional): Teachers in first and second grade may shift away from traditional calendar routines to better meet the needs of their class. These routines establish repetitive practice of essential mathematical skills pertaining to the grade level and real world. **Math Made Fun!** (K): An engaging math supplement that includes daily differentiated lessons, pre- and post-assessments, and hands-on centers. **Number Talks** (K-5): Number talks activities are meant to develop and review number sense concepts. http://www.insidemathematics.org/classroom-videos/number-talks **ST Math Test Drives**: Teachers will incorporate these tools into whole and/or small group instruction, whenever possible, to promote the link between blended learning programs, curriculum, and the ICS. https://web.stmath.com/entrance/jijiconsole.html **Achieve the Core:** https://achievethecore.org/category/854/mathematics-lessons

Students below grade level - If a middle school student scores at Level 1 or Level 2 on the statewide-standardized assessment in mathematics, then the following year the student will receive remediation.

Grades 6-8 Additional Technology Resources/Supplements: Technology will also be integrated into the mathematics curriculum to enable students to explore, visualize, solve, and better describe the concepts they are learning. Graphing software, calculators, computers, and interactive white-boards are some of critical technology tools that will be used as part of an effective mathematics program, as applicable.

Science

The Science curriculum will incorporate an inquiry-based approach to learning. The Science Curriculum addresses critical domains in science: The Nature of Science, Earth and Space Science, Life Science, and Physical Science to meet the specified annually assessed and content-sampled benchmarks found in the NG-SSS. Using pacing guides, teachers will plan science instruction that meets the standards benchmarks grouped in nine-week clusters. The School will incorporate an inquiry-based approach to learning of the central science themes: matter and energy, force and motion, earth and space, processes of life, and the scientific method. Students will participate in monthly *Scientist of the Month* projects in order to provide them with the ability to apply and practice the scientific method. Moreover, students will participate in weekly hands-on science investigations in the classroom, exposing students to the scientific process and scientific thinking. In grades 5-8 students will be encouraged to participate in Science Clubs where they will be able to explore and investigate the steps to the scientific method.

Differentiated Instruction in the Science Classroom

To meet the individual needs of students, teachers will also provide differentiated instruction opportunities through enhancement of conceptual understanding of the Next Generation Science Standards/ICS via varying entry points of instruction, learning tasks, and outcomes, which include but are not limited to:

Five "E" Instructional Model

1. Engagement
2. Exploration
3. Explanation (& Elaborate)
4. Evaluate
5. Extend

This approach takes students through the learning cycle by tapping into prior knowledge and experiences, new explorations and investigations.

Engage - These activities mentally engage students with an event or question. Engagement activities capture students' interest and help them to make connections with what they know and can do. The teacher provides an orientation to the unit and assesses students' prior understanding of the concepts addressed in the unit.

Explore - Students encounter hands-on experiences in which they explore the concept further. They receive little explanation and few terms at this point, because they are to define the problem or phenomenon in their own words. The purpose at this stage of the model is for students to acquire a common set of experiences from which they can help one another make sense of the concept. Students must spend significant time during this stage of the model talking about their experiences, both to articulate their own understanding and to understand another's viewpoint.

Explain – Only after students have explored the concept does the curriculum and/or teacher

provide the scientific explanation and terms for what they are studying. The teacher may present the concepts via lecture, demonstration, reading, or multimedia (video, computer-based). Students then use the terms to describe what they have experienced, and they begin to examine mentally how this explanation fits with what they already know.

Elaborate/Extend - Students elaborate on their understanding of the concept. They are given opportunities to apply the concept in unique situations, or they are given related ideas to explore and explain using the information and experiences they have accumulated so far. Interaction between the students is essential during the elaboration stage. By discussing their ideas with others, students can construct a deeper understanding of the concepts.

Using NGSS standards for Science, teachers will develop lessons using strategies that incorporate the following **Essential Science Components: Preparing Students for Learning and Prior-Knowledge Assessment -** *"frontloading" to elicit prior knowledge related to real-life experiences and applications.* Strategies: Using graphic organizer, Concept Mapping, KWL, showing a video clip, conducting a demonstration, using literature.

Developing Active Learners - *Students can become active learners by providing opportunities for them to construct their own understanding. These situations should require students to organize, classify, interpret, and draw conclusions about real-life mathematical and scientific problems*. Strategies: Posing open-ended questions, real-life scenarios to solve, or situations requiring higher order thinking skills.

Differentiated Instruction - *A variety of instructional formats will be used in the classrooms to make sense of the content and to construct meanings from new situations. The School will provide opportunities for small-group work, individual exploration, peer instruction, and whole class discussion and inquiry-based instruction*. Strategies: Using scientific laboratory equipment, hands-on activities, and technology-based activities.

Integrated Teaching - *Students must recognize the various roles that science plays in real life. The connection and application of science will motivate, give meaning to, and reinforce student learning.* Strategies: Posing authentic problems to solve; bridging and activities that involve students in critical thinking, process skills, and product development.

Critical Thinking and Higher-Order Questioning - *Use effective, open-ended questioning techniques that encourage student inquiry. Encourage students to pose their own questions, evaluate the information presented, and make informed decisions about the information. Examples would include, "How would you solve a similar situation?" or "What criteria would you use to ...?"* Strategies: Elaborating, analyzing, hypothesizing, and evaluating.

Strategies will be implemented to increase awareness of Science programs and initiatives as well as to ensure student success and mastery of Next Generation Sunshine State Standards, the FS Standards for Literacy in Science, and the FS Writing Standards for Science, as follows:

- Commit to hands-on science learning experiences- science teachers will incorporate at least 75 minutes of laboratory experience per week into their instruction;
- Encourage development of science clubs as well as Science/math related honor societies;

- Encourage students to participate in hand-on activities such as those proposed in SECME;
- Allocate time for Science and mathematics teachers to work together to plan the integration of science and mathematics to support the curriculum of their specific courses (e.g. mathematics and science teachers at the School will include meaningful mathematics and science projects that emphasize the content strands and can be incorporated into classroom and home learning assignments);
- Integrate technology and literacy (e.g. CRISS strategies for mathematics and science) as a part of their effective teaching strategies;
- Utilize current research-based programs and high quality materials with documented success; and
- Inform the community and the parents about the curriculum, assessment, and courses necessary to pursue various career options through a Family Math/Family Science and Technology Night.

K-5 Instruction: Students in grades K-1 will receive 60 minutes per week of science instruction, while students in grades 2-5 will receive 150 minutes per week of science instruction covering the Next Generation Sunshine State Standards. Students will participate in weekly hands-on science investigations, which will expose students to scientific processes and scientific thinking. Students will be encouraged to participate in Science Labs and Science Fairs where they will be able to explore and investigate the steps to the scientific method. These activities will allow students to recognize the various roles that science plays in real life. The connection and application of science will motivate, give meaning to, and reinforce student learning.

Grades 6-8 Courses Students will be required to successfully complete three middle school annual courses in Science.

Instructional Materials: The school plans to use standards-aligned instructional materials, including digital software and multimedia in the instruction of Science.

Research-Based Instructional Materials (Science)

Grades	CORE	Supplement/ Technology	Rationale All Materials Aligned to NGSS
K-5	Houghton Mifflin Science Fusion	Gizmos Zaner-Blossser *I Read to Write Science Weekly* Brain Pop *Think Central*	*Fusion* provides informational texts along with many hands-on labs. Teachers and students have access to *ThinkCentral,* which provides interactive labs.
6-8	Pearson *Interactive Science*	Gizmos Brain Pop	Program provides a variety of interactive tools to help support, extend, and enrich classroom instruction.

6-8 Advanced	Pearson *Interactive Science* (pacing Adv) Physical Science: *CPO Science* Biology: Pearson Prentice Hall *Miller & Livine Biology*	Gizmos Khan Academy Brain Pop	Interactive Science embodies the 21st century learner by infusing the core subjects and themes throughout the program; provides continuum of accelerated intervention strategies CPO Science- rich in STEM connections and aligned with NGSS Biology- text that will prepare students for advanced coursework

Additional Science instructional materials will be gathered for lesson plans using the following resources:

- Scientific magazines such as Science Weekly and National Geographic Resources
- National Institute for Science Education
- National Science Teachers Association

Social Studies

The School will deliver a Social Studies curriculum that will prepare students to achieve mastery of Social Science ICS as well as content area literacy standards for all grades. Social Studies education will promote loyalty and love of country and community, and it will prepare students to participate intelligently in public affairs. Its component disciplines foster in students the knowledge and skills needed to understand current political and social issues. Social Studies education will provide students with an understanding of the democratic principles and ideals upon which good citizenship is founded and an understanding of the world beyond their borders.

The comprehensive Social Studies program will:

- Emphasize content, concepts, and skills from the social sciences, the humanities, and, where appropriate, mathematics, and the natural sciences;
- Reflect a clear commitment to democratic beliefs and values;
- Encourage civic responsibility and active participation;
- Promote high expectations for all students;
- Incorporate a multicultural perspective;
- Reinforce the development of a global perspective;
- Promote understanding of social, political, and economic institutions;
- Encourage student involvement in community service;
- Focus on the identification of the potential solutions to local, national, and world problems;
- Involve students in their learning by using a variety of teaching strategies and instructional materials; and
- Promote an interdisciplinary approach to learning.

The school will use school-created pacing guides for K-8 to support mastery of ICS and incorporate the following topics in the Social Science curriculum:

- African-American History (K-8)

- Holocaust Education (K-8)
- Hispanic Contributions to the United States (K-8)
- Women's Contributions to the United States (K-8)
- Sacrifices made by veterans in protecting democratic values (K-8)
- History of Idaho (K-8)
- History and content of the Declaration of Independence and the U.S. Constitution (K-8)
- Digital Citizenship (K-5)
- Multicultural education (K-8)
- Character Education (K-8)
- Economic Education (6-8)
- History of the U.S., including the period of discovery, early colonies, the War for Independence, the Civil War, the expansion of the U.S. to its present boundaries, he world wars, and the civil rights movement to the present (Grade 8)

Instructional Strategies
Use visuals such as graphs, maps, information and digital materials (google earth) in social science instruction. The School will also use Newspapers as a literacy enrichment supplement and to incorporate data analysis daily by means of graphs and charts and will integrate Reading and Writing strategies within the Social Science Content using Literacy Standards for Social Science.

Claim Evidence Reasoning (C-E-R) - requiring students to state a **claim** (may be in response to a question); to provide **evidence t**o support the claim, and state a **reason** why the evidence answers the question.

Inquiry-based learning – though primary sources of information - allowing students to: **Connect:** to prior knowledge, interpreting and questioning an information source; **Wonder:** develop focus questions to guide their inquiry investigations; **Investigate:** use a combination of primary and secondary sources to pursue their questions in depth; **Construct:** organize and draw conclusions from the information to confront conflicting ideas and form and defend their evidence-based opinions; **Express:** develop a product to demonstrate their new understandings and share with others, they solidify their own learning; and **Reflect:** think about what they have learned about the topic or idea and about inquiry itself.

History Labs require in-depth learning and thinking on the part of the student guided by an essential question, analysis of primary or secondary source documents, and ending in a rigorous writing assignment or other rigorous learning task. History/Social Science labs ensure that engaging lessons are designed to increase student skill level in interpreting documents. School-based **"Civics in a Snap Lessons"** in grades K-5 will support the scaffolding of civic knowledge and dispositions. School-based **"Civic Engagement Lessons"** in grades 3-5 will support the scaffolding of civic knowledge and dispositions.

Stimuli Based Instruction using primary or secondary sources of information, emphasizing content/skills explicitly stated in standards/benchmarks, to increase student content knowledge, analytical skills, and engagement (e.g., political cartoons, graphs, quotes, etc.)

Grades 6-8 Courses: Students will be required to successfully complete three middle school annual courses in Social Science.

Other Instructional Strategies

Power Hour

Power Hour reading was built on the premise that all students deserve differentiated instruction at their readiness level. This structure is derived from student need, coupled with teacher strengths, to meet the diverse range of learners within a grade level. Rather than every teacher facilitating three or more reading groups within their classroom, students are grouped according to their readiness/ability levels. The teachers along with the principal will determine which option best meets the needs of the learners within their grade level.

Options for student rotations are as follows:

Option 1: Rotating Power Hour (entire grade level moves): Students begin each day in their homeroom to receive grade-level instruction based on the Nevada Academic Content Standards. The weekly suggested lesson plans from the Wonders Literacy Series is broken up into whole group and small group activities. The whole group activities serve as the basis for the homeroom instructional block. During the second block (Power Hour), students rotate among the grade level to receive instruction at their readiness/ability level. The number of teachers at each grade level will determine the number of groups (e.g. low, medium-low, medium, medium-high, and high for 5 teachers). The small group activities from the Wonders Literacy Series will be the starting point for instruction within each group. Supplements for instruction are listed in the chart below.

Option 2: Targeted Power Hour (outliers move): Students begin their day in their homeroom for the on-level Wonders lesson. During the Power Hour block, very low and very high student outliers shift classrooms to receive additional instruction at their readiness level. All other students remain in their homeroom.

Option 3: Homeroom Power Hour (all students remain): Students receive differentiated instruction within their own classroom.

Strategies for Serving Special Populations

At-Risk

In accordance, with Idaho Administrative Code, PAI defines "at-risk" as "any secondary student grade six through twelve (6-12) who meets any three (3) of the following criteria:"[6]

- Has repeated at least one (1) grade.
- Has absenteeism that is greater than ten percent (10%) during the preceding semester.
- Has an overall grade point average that is less than 1.5 (4.0 scale) prior to enrolling in an alternative secondary program.
- Has failed one (1) or more academic subjects in the past year.
- Is below proficient, based on local criteria or standardized tests, or both.
- Is two (2) or more credits per year behind the rate required to graduate or for grade promotion.

[6] IDAPA 08.02.03.110.01 (June 2019)

- Has attended three (3) or more schools within the previous two (2) years, not including dual enrollment.
- Has documented or pattern of substance abuse.
- Is pregnant or a parent.
- Is an emancipated youth or unaccompanied youth.
- Is a previous dropout.
- Has serious personal, emotional, or medical issue(s)
- Has a court or agency referral.
- Demonstrates behavior that is detrimental to their academic progress.

PAI's highly involved system of data assessment, monitoring, and Power Hour model will ensure that all at-risk students are identified and supported to ensure that all students have the opportunity to be academically successful.

Special Education

As a public charter school, admission to PAI will have no exclusionary component, and special education students will be encouraged to enroll in the same manner as non-special education students are recruited. All of our recruitment materials will be tailored to address the concerns of students with disabilities and their parents. Once enrolled, students with special education needs will be included in the school's regular education and extracurricular environment to the extent that such participation is consistent with each special education student's individualized education program (IEP). In all cases, the school will conduct special education as it is outlined for each individual special education student in his/her IEP. The charter school will convene IEP review meetings in order to review and revise IEPs as appropriate. The school always will attempt to place the special education student to the maximum extent appropriate in a learning environment with both his/her disabled and non-disabled peers, in accordance with the student's IEP.

As part of the school's registration process (after the student has been accepted in lottery), parents will be asked if the student has an IEP. If the parent marks "Yes" a Pop-up window requests the parent to provide the student's current IEP and any other relevant documents. In addition, the school registrar will request special education records from each student's previous school to ensure that current documentation is received in the event the parent is unable to provide this documentation or does not disclose the student's disability status for whatever reason. The paperwork is collected and a caseload spreadsheet of all enrolling students with special education eligibility is created. Parents will also be requested to turn in 504s, but the school will also take proactive steps to request such records on behalf of all students immediately following the receipt of a records transfer form from the parent.

The continuum of services offered by Pinecrest Academy of Idaho begins in regular education classes. All students are given a universal progress monitoring assessment 5 times a year. Then the school analyzes the data. Each quarter the school meets as a team during "Data Day" which allows the school to discuss children scoring in the bottom and top 15% or another cut score as determined by the school. Students who score in the bottom 15% and students who are failing are discussed and an intervention plan is developed. Students who score in the top 15% are identified and provided specific differentiated instruction for accelerated learners. The staff then

brainstorms different interventions that may help the student progress further academically or behaviorally. In general education, Power Hour and intervention periods are scheduled in daily to provide instructional level academics to all students. In addition, before and after school tutoring clubs and blended online learning programs provide instructional level interventions and accelerations.

If the student is still not showing progress on the universal progress monitoring, the student will enter into an SABIT program. During SABIT, a goal is written in the deficit academic area, the student is provided with additional interventions, and the student has weekly progress monitoring related to the goal. The data is graphed and analyzed every 6-8 points. If the student's graphed line is not moving toward the grade level trend line, then instruction becomes more intensive by increasing the amount of time in intervention, increasing the number of sessions in intervention, or changing the teaching method. If after 12-16 data points, the student's graph still shows a lack of progress, the student will be referred to special education. Consistent with Federal law and guidance, a parent may also request a comprehensive evaluation at any time, including prior to commencement of or during the SABIT process.

Over-Identification
Students who are inappropriately placed in special education will be identified by progress monitoring on a routine weekly basis through their IEP goals. Students also take quarterly universal progress monitoring assessments that all students in the school are given. The special education teacher will complete a monthly analysis of data to determine if students are meeting their goals. If students are meeting their behavior and/or academic goals and progress monitoring is showing growth, the IEP team can meet to discuss the exit of students who are no longer showing academic or behavioral needs.

If the school has a student who needs transitioning out of special education, the IEP team may transition the student out by revising the IEP to provide consultation services during the reevaluation period. If the team determines that student no longer needs an IEP, said student will be referred to the school psychologist who, with parental permission, will reevaluate the student. The IEP team will then meet to determine if a student is still eligible in the eligibility category or does not meet eligibility.

Continuum of Services
Once the evaluations are complete, the team will reconvene to discuss the results of the evaluation and determine eligibility for special education. The school will provide a copy of the eligibility report, along with copies of all evaluations to the parents. The conference may convene without the parent under the following conditions: (1) the parent waives his or her responsibility to attend, or (2) the parent has neglected to respond to three documented communication efforts.

Once this conference is completed, the team will develop an Individualized Education Program (IEP), determining what special education or related services will benefit the child.
An IEP will be completed describing the special services, and the parent or guardian will sign a Consent for Special Education Form. Once this process has been completed and the team, including the parents, is in complete agreement with the provisions of the IEP, the IEP will be

signed and services will begin immediately.

IEP Yearly Reviews
Once a year, or more frequently if necessary, there will be a team conference, that includes the individuals described in §300.344, and other qualified professionals, regarding each child on an IEP. During this conference, team members will discuss the progression toward annual goals and objectives, develop new goals and objectives, and determine whether the child's special needs can continue to be appropriately met through the current educational placement. To initiate such a conference, the special education teacher will send home a Prior Written Notice accompanied by a Notice to Conference Form. As with the initial IEP meeting guidelines, the special education teacher must give the parent a number of opportunities to participate and document at least three attempts to establish communication prior to holding an IEP meeting without the parent.

Three-year Reevaluations
Reevaluations will be conducted in accordance with the procedures outlined above regarding initial evaluations if conditions warrant a reevaluation or if the child's parent or teacher requests an evaluation. They will occur at least once every three years. An IEP meeting will follow to develop new goals and objectives. IEP teams cannot exit or deny students from services based on reevaluations finding that a student no longer meets initial eligibility criteria.

The School Leader and the special education staff will maintain exceptional records, and proper measures will be taken to ensure that they are kept confidential pursuant to applicable laws and regulations. These procedures include but are not limited to allowing parents the right to inspect any files pertaining to their child, maintaining a record of all parties gaining access to exceptional files, amendment of records at parent request, parental consent, procedural safeguards, destruction of data, children's rights, and providing a free appropriate public education (FAPE).

Least Restrictive Environment
Consistent with the principle of least restricted environment, most students who are determined to be eligible for special education services would first receive support in regular education with supplementary aides and services and progress monitoring would continue. If the student showed no academic growth, a resource room would be added. A Resource Room could then be added up to 50% of the day to provide the necessary interventions to show academic growth. Students with severe intellectual disabilities also can benefit from combining inclusion with a resource room. In the regular education classroom, using peer assisted learning and online programs can help the student remain with typical peers and receive intensive instructional level instruction.

Students with severe emotional disabilities also can benefit from combining inclusion with a resource room. In addition, a Check-In/Check-Out system is very effective for students with emotional needs. A mentor is assigned to the student and the student has a daily progress monitoring sheet which goes home daily. The student's parent bridges their behavior at school to privileges at home. Depending on the student's needs, the mentor will check in with student at least three times a day, though more can be done if needed. Furthermore, the school counselor

can help the family with locating appropriate community support.

Depending on the nature of and severity of the disability, other placement models outside of the approach discussed above may be determined to be more appropriate to the needs of the student. As a local education agency, the charter school could explore contracting for a change in setting in a manner consistent with Idaho Department of Education procedures or bringing in other resources to meet the student's needs.

Staffing
PAI's administration team will recruit highly qualified special education teachers through multiple means. They will use job recruiting websites such as Teachers to Teachers and PAI's administration will attend and recruit teachers at Teacher Fairs in several states. Teachers who are not certified in Idaho will apply for teacher certification. All related service personnel including speech and language therapists and school psychologists will be certified in the State of Idaho or they have to apply for a license before they are hired.

Staff Development
PAI will schedule Professional Development (PD) days into their yearly calendar. PD will be offered in the areas of intensive interventions and research validated methods addressing the unique needs of students with disabilities. Additionally, the special education teachers, the special education facilitators, and the related service personnel (e.g. - SLP and OT) will be in communication with teachers providing instructional information on how to modify the curriculum and address the unique needs of students with disabilities on a weekly basis as service is provided.

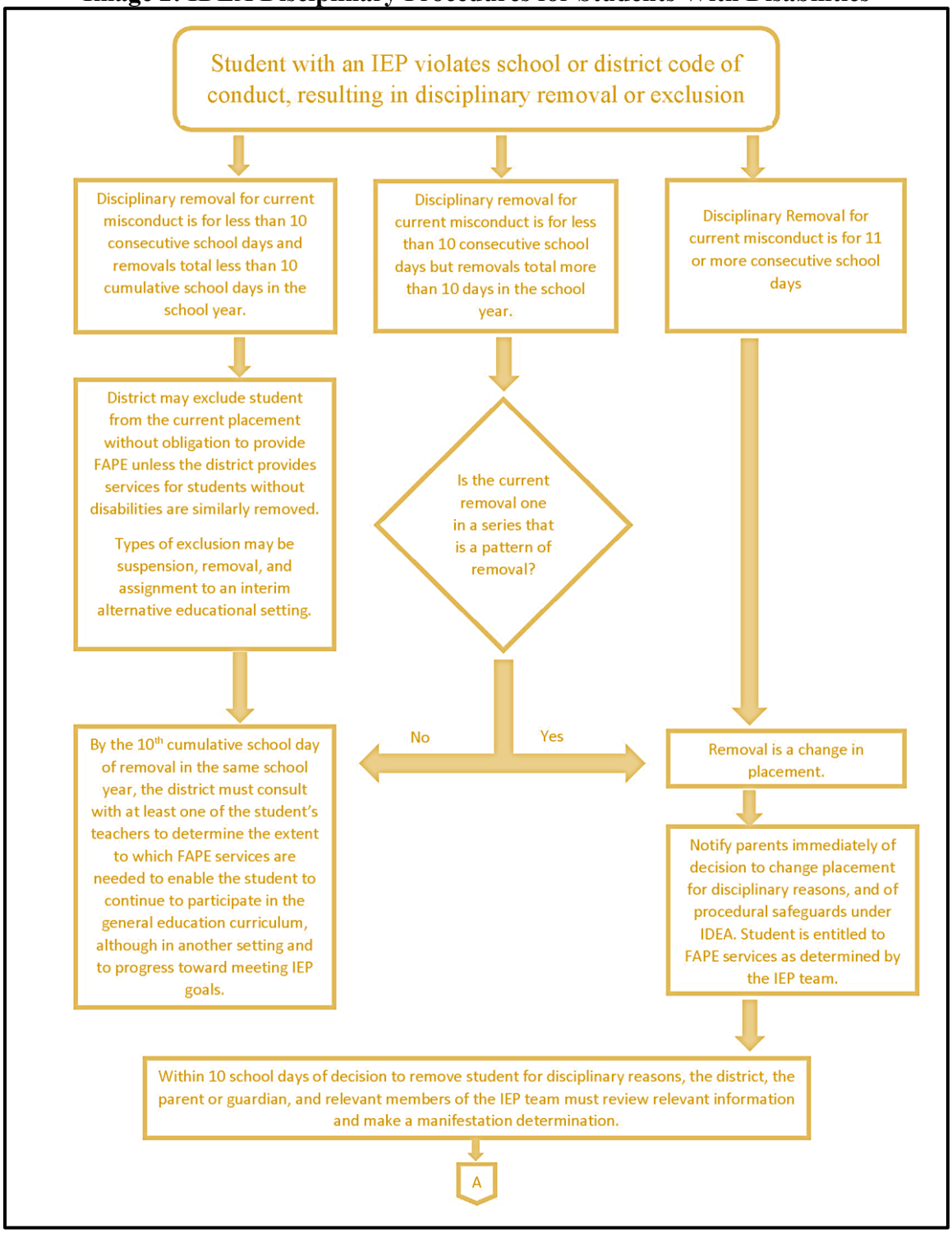
Discipline
The rights of students with disabilities are protected by following the IDEA flow chart below. If a student with disability has a discipline problem, the administration contacts the parent for a parent meeting. If the student is suspended, all school work may be picked up daily by the parent and returned so that student's grades are not affected. Alternately, the school can provide the work by other means. If necessary, a teacher will provide service in the home setting or the student will receive alternative instruction in an after school program.

The IEP team will also meet after 5 suspensions to complete a manifestation determination IEP meeting. The team will brainstorm other services and community resources that may benefit the student to prevent further behavior disruptions. A Functional Behavior Assessment (FBA) will be completed and the team will reconvene to write a Behavioral Intervention Plan (BIP). The team may also request a Behavior Therapist to help in the process.

If the student has reoccurring events that result in further suspension, the team will meet after nine suspensions and complete a change of placement. The administration will contact the parent for a parent meeting. Each time a student is suspended, all school work may be picked up daily by the parent and returned so that student's grades are not affected or other arrangements may be made to ensure access to assignments. Again, if necessary, a teacher will provide service in the home setting or the student will have alternative instruction in an after school program. Please

see **Image 2**[7] below:

Image 2: IDEA Disciplinary Procedures for Students With Disabilities



[7] Bateman, David F. & Bateman, C. Fred. *A Principal's Guide to Special Education, 3rd Edition.* Council For Exceptional Children. Arlington. (2014).

Monitoring
PAI's special education programs comply with all federal and state laws. The role of the special education facilitator is a complete compliance review on all IEPs before and after the IEP meetings. In addition, a review of the confidential folder will be completed monthly on all confidential folders. Special education facilitators check annual and three-year dates weekly to make sure all meetings are held on time.

Special education teacher's complete progress monitoring on a weekly basis to evaluate for student growth and success. If a student shows no academic growth, a resource room is added. A resource Room can be added up to 50% of the day to provide the necessary interventions to show academic growth. If a student shows academic growth, then said student will be provided a less restrictive placement with support. As the student successfully progresses towards full time in the general education curriculum, direct support services can be implemented by the special education teacher in the regular education classroom with supplementary aides and services until they receive consultation services. Quarterly progress reports are sent home. Progress reports are also sent home more frequently as determined by an IEP team. Student grades are also monitored weekly to see academic growth. If students are not receiving enough support determined by weekly progress monitoring and grade checks then the IEP is revised.

Once students are in middle school, a daily monitoring sheet will be used and includes looking at direct instruction participation, classwork participation, homework turn-in, and citizenship. Each teacher signs the student out of class. Special Education teachers check students out at the end of the day. Copies of the form go home with the students for parents to sign. Special education teachers keep a copy and the student returns the signed copy the next day when they pick up their new folder.

Special education facilitators will help to monitor the academic and behavioral growth of students with disabilities in order to ensure that student needs are being met. Adjustments to a student's instructional programs are made accordingly through the collaboration with the SPED team (teachers, administration, and SPED Facilitators) and progress monitoring.

Parental Involvement
All PAI staff will follow all IDEA procedures when implementing appropriate programs related to IEP evaluations/re-evaluations by phoning parents to set up meetings and then following with two prior written notices.

Check-In/Check-Out systems and progress monitoring reports are sent home on a predetermined frequency: daily or weekly. Quarterly progress reports and report cards are mandatory universal grade reports. Special education teachers and related staff are expected to have frequent communication with parents with students with emotional and or behavioral needs.

In this digital age, teachers even text back and forth with a parent through the day if necessary to give them updates if a parent requests to be informed. In addition, the school uses an online program and websites where they post all school events and homework assignments.

English Language Learners

Identification

PAI will identify the primary language of students upon enrollment. The process is as follows:

- All newly-enrolled students are provided a Home Language Survey (HLS) which is included in the enrollment packet.
- Based on the answers provided to the questions in the HLS, student records will be requested from the student's last school/school district. Students without a WIDA Placement will be given a placement test.
- All student screening and evaluation will use the assessment framework adopted by the State of Idaho, the World-Class Instructional Design and Assessment's (WIDA) Assessing Comprehension and Communication in English State to State for English Language Learners (ACCESS). PAI will initially administer the WIDA-ACCESS Placement Test (W–APT), an English language proficiency "screener" test given to incoming students who may be designated as English language learners. It assists educators with programmatic placement decisions such as identification and placement of ELLs."[8] The W-APT screener for English proficiency will take place in the first 30 days of school.

Placement

For students Classified as Non-English or Limited English Proficient who are coded as non-English or limited English proficient as a result of the initial assessment, the following steps will be completed within the mandated timelines:

- Classify students who are eligible for English Language Learner (ELL) services as Non-English or Limited English proficient. The students eligible for ELL services.
- Prepare a Parent Notification Letter if a student qualifies for ELL services. Once the parent receives the letter, they may choose to receive ELL instructional services. If the parent or guardian refuses ELL instructional services, the school will meet with the parent or guardian to ensure that the parent or guardian understands what is being waived. Parents or guardians may only waive ELL instructional services – not testing. The school will document the parent conference and place a copy of the waiver in the cumulative student folder.
- As stated above, students will be evaluated with the World-Class Instructional Design and Assessment's Assessing Comprehension and Communication in English State to State for English Language Learners (WIDA-ACCESS) assessment, which is based on a six tier scoring system. Students will receive an English Language Proficiency Level on a scale of 1-6 (1-Entering, 2-Emerging, 3-Developing, 4-Expanding, 5-Bridging, 6-Reaching). Teachers will utilize the score report to better differentiate instruction to meet the needs of each student.
- Once students are assessed, the Principal will ensure that eligible students are provided appropriate ELL services. In addition, Principals or designees will ensure that ELL students and their parents or guardians are aware of school activities and other opportunities at the school in a language they understand. Students who are eligible for ELL services will receive these services until it is determined, through reevaluation procedures, that they possess adequate English language and academic skills to allow

[8] WIDA. Assess. *Kindergarten W-APT.* [website] URL: https://wida.wisc.edu/assess/kwapt; last accessed June 2019.

them to perform satisfactorily in general education classes without special instructional considerations.

Staffing
PAI's ELL services may be coordinated through a teacher with an ENL-7126 endorsement who will, at least initially, be administering ELL identification and support services in conjunction with his or her role as a classroom teacher. PAI's Board and Principal may also decide to contract for these services through duly-certified, ENL-7126 endorsed contractors that administer ELL assessments and support ongoing monitoring of ELL students.

PAI will offer an evidenced-based ELL Program such as the Content-Based Model. The goals of all of the program will be to: (1) help ELL students achieve comprehension, speaking, reading, and writing competence in the English language; (2) enable students to achieve and maintain grade level status; and (3) enable students to meet graduation standards. The Sheltered Content-Based ESL Instruction Model is an integrated content language approach. The goal of the Sheltered Content-Based Instruction Model is for ELL students to develop English language skills in content classes.[9]

The goal of the content-based approach is the acquisition of English and grade level academics so that the ELL student can succeed in an English-only classroom. This approach has the following features:

- All instruction is done in English;
- When possible, the child's primary language is used to clarify instruction;
- English is taught through reading, language arts, math, science, and social studies;
- A strong English language development (ELD) component is included in every lesson;
- The acquisition of English takes place in a structured, non-threatening environment in which students feel comfortable taking risks; and
- Controlled vocabulary is included while students gradually acquire the necessary language skills to succeed academically and become lifelong learners.

The reading and math Power Hour blocks will provide excellent opportunities to group students with similar English-acquisition profiles. The school may need to provide instruction in the students' native language during Power Hours to aid with cultural assimilation and language comprehension. Ready Reading from i-Ready has built in ELL modules in each section that can be delivered by the classroom teacher or during Reading Power Hour. Teachers will also support non-native English-speaking students by introducing the richness their language and culture brings to the classroom. Ethnically and culturally diverse students will be welcomed and celebrated.

Monitoring
PAI will progress monitor ELL students as with all students on a regular basis using data to track their progress. In addition, ELL students will be reassessed every year to determine whether the pupil's proficiency in English is fluent and whether they are able to succeed in courses of study

[9] Dong, Yu Ren. (2005). Educating language learners: getting at the content. Educational Leadership, 62(4), Retrieved from http://www.ascd.org/publications/educational-leadership/dec04/vol62/num04/Getting-at-the-Content.aspx; last accessed June 2019.

that are taught only in English. The school will monitor all reclassified students for a minimum of two years after they have met language proficiency.

The Principal will ensure appropriate policies are followed. As with non-ELL students, ELL students may be retained. In the case of ELL students, the Principal will ensure that ELL students are not retained based solely on the student's inability to perform in the English language. In making a determination of whether an ELL student should be retained, the Principal will ensure that careful consideration is given to the range of services and options available prior to making the decision to retain a student. Response to Instruction (RtI) data should be used to assist the principal in making retention decisions regarding an ELL student.

Adjustments or changes to the student's educational program may be necessary in order to avoid retention. As with non-ELL students, retention concerns should be ongoing throughout the year. If the decision is made to retain an ELL student, the principal will ensure that the student receives different services during the year following the retention.

ELL students be reassessed every year to determine whether the pupil's proficiency in English is fluent and they are able to succeed in courses of study that are taught only in English. The student must be given the test Accessing Comprehension and Communication in English State-to-State for English Language Learners (ACCESS for ELLs) every year until the student exits the ELL program. Parents or guardians of LEP children do not have the option of withdrawing their student from participating in the ACCESS for ELLs.

PAI may reclassify an ELL student only if the school administers the ACCESS for ELLs to assess the pupil's proficiency to comprehend, speak, read, and write English. Afterward, the pupil will obtain a score on the examination that is equal to or greater than a score for a person who is fluent in speaking, reading and writing English, as established by the publisher of the examination.

The school will monitor any students reclassified as English proficient who have not yet met exit criteria. The school will ensure that reclassified students are appropriately placed in general education classes and PAI will monitor a student reclassified as fluent-English proficient, but who has not yet met exit criteria, for no less than two years. The purpose of this monitoring is to ensure that the students have no grades below a "C" in any academic class and are no longer in need of language acquisition assistance.

The monitoring from the school will include periodic contact with the student's teacher(s) to ascertain student progress. The school will also review the student's report card annually to review the student's attendance, academic and citizenship grades. To be considered academically successful, a student should have no grades below a "C" in English, reading, math, science, or social studies.

The ELL monitoring process information should be included in any RtI interventions that are determined by the school. Specific consideration for language proficiency must be taken into consideration in planning specific interventions for the student. If, as a result of monitoring, evidence indicates that the student is not successful in English-only classes and needs further

language acquisition assistance, the school will administer the initial assessment test to ascertain the student's current English proficiency. A meeting will be held with the student's parents or guardians and the student will be considered for reinstatement into the ELL program, into an academic remediation program, or the student will remain in English-only classes. The school will continue to monitor the student for language and academic progress. If the student is determined to be academically unsuccessful, the school and the appropriate teachers will seek out other services for the student in order to address any academic deficiencies. Prior to making any changes, the principal or designee will meet with the parents or guardians to discuss the recommended changes.

Parental Involvement

Principals or designees will ensure that ELL students and their parents or guardian are aware of school activities and other opportunities at the school in a language they understand. Parent outreach for ELL families will conducted in a manner and format that is meaningful and accessible to the parent. In some instances, for example, written documents may be inaccessible to parents with limited literacy in their primary home language. Such families will need to be contacted verbally at a time and in a place that is conducive to their involvement and attention (e.g. at home versus when they're working and could face discipline for using a personal phone). Parental and community involvement in the School is a fundamental and expected (but not legally required) part of the philosophy and operation of the School. The goal is to encourage parents to be active participants in their child's education, and give the community ownership of a high quality educational program, and teach children to be civic-minded and socially responsible. Parents and community members will have extensive opportunities for involvement in aspects of school operations. Through the parent/teacher group, School Advisory Council (SAC), and other such committees, parent and community representation and decision making in the educational processes of the School is possible. Similarly, the administration will also require the faculty and staff of the School to uphold a strong belief in and understanding of the charter school concept through the inclusion of parents in the educational process. Through open lines of communications, faculty and staff will also encourage parental involvement through such endeavors as follow:

- Parental Volunteers – parents will be welcomed to volunteer at the School during various school activities, assemblies and meetings. Parents can be active participants in the parent club and their child's homerooms. Volunteer opportunities to complete parent participation hours (communicated through newsletters, the School website, schoolnotes.com, email and calls home) will be plentiful and yearlong. Some of these will include activities such as chaperoning field trips, assisting with class and community service projects, helping in the library, participating in Career Week and Family Day, and assisting with the School store.

School Advisory Council (SAC) - This group will consist of school personnel, parents, students, local business, and community members. Members will be able to address and vote on pertinent school matters on a regular basis.

- Quarterly Parent/Teacher Conferences – hosted in the evenings at the School where parents can discuss topics that affect their children's educational progress.
- Open houses, Career Fairs, Family Day - events held to recruit new students, maintain communication and involvement between the School and the surrounding community.

- School Website, Newsletters, Social Media, and Event Calendar – updated regularly to disseminate information and maintain open lines of communication in the community.
- Community Service Projects – students, faculty and parents will participate in activities to help, give back to, and connect with, the community.
- PTO – Parent Teacher Organization coordinates extra-curricular events involving the community.
- Parent Club- dedicated to work in partnership with the families, faculty, and community to provide resources for the school through fundraising and volunteering. The club strives to support students in an academic environment that encourages character building.
- Parent Workshops on education-related topics, such as decision-making regarding school performance and student assessment needs will be offered.

The school will continually seek out opportunities to educate parents and community members about the school's vision and mission, instructional philosophy, governance, school performance, and student assessment criteria. PAI will issue a parent satisfaction survey at least once a year. The results of this survey will help PAI's governing board determine actions needed to address categories averaging less than 70% satisfaction, with the goals of achieving at least 85% satisfaction on average across the survey.

Homeless/Migrant

Identification

PAI will identify students and families in need of homeless/migrant services for new students by including a space for identifying homeless/migrant student status in the initial enrollment of a student. Additionally, because students can become children in transition at any point, PAI will identify existing students in need of homeless/migrant student services through counselor/teacher referrals and proactive communications with parents and families about available supports. Misidentification will be avoided by making sure staff involved in registration of new students understand the differences between families have a difficult time pulling together all materials required and/or requested for enrollment: birth certificates, immunization records, previous school records, home address etc., and those families who lack this information due to their homeless/migrant status.

To assist in identification, PAI will follow to the broadly defined definition of homeless as set forth in Section 330 of the Public Health Service Act (42 U.S.C., 254b), Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009 (P.L. 111-22, Section 1003), remaining cognizant of the evolving and complex nature of defining homelessness:
The term "homeless" or "homeless individual" includes:

- An individual who lacks a fixed, regular, adequate nighttime residence;
- An individual who has primary nighttime residence in a supervised, publicly or privately operated shelter for the accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill);
- An individual who sleeps in a public or private place not designated for, or ordinarily used as, a regular sleeping accommodation for human beings (e.g., cars, parks, motels, campgrounds, undeveloped state or federal lands);
- Children living with a parent in a domestic violence shelter;
- An individual who is, out of necessity, living with relatives or friends due to lack of

housing;
- Runaway children (under 18 years of age) and children and youths who have been abandoned or forced out of the home by parents or other caretakers, or such youth (between 1 and 20 years of age) who may still be eligible for educational services who: temporarily reside in shelters awaiting assistance from social service agencies; live alone on the street or move from place to place between family members, friends, or acquaintances; and children of migrant families who lack adequate housing.

To meet the specific needs of low-income students, PAI will send voluntary questionnaires to families to address food and housing security. Interventions and services will be offered where required or allowed by law. These may include coordinating with social service organizations, providing transportation for homeless students, and addressing wrap-around nutrition services. PAI will choose a National School Lunch program vendor who can provide meals at or below the cost of the federal reimbursement rate and comply with the requirements of Idaho Child Nutrition Program.[10] There would not be a need for a budget for the program since it would be expected to break-even.

Gifted/Talented

Gifted students will have many opportunities to stretch their learning and work with peers at their readiness level. The reading and math Power Hour configuration will provide ample opportunity to receive challenging programming. Ready Reading and Ready Math have modules built in for advanced learners that can be assigned during grade-level instruction and during Power Hour.

Identification

In accordance with Idaho Code §33-2001, gifted/talented students are 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."[11]

PAI will identify and meet the needs of gifted and talented students, in accordance with Idaho Code §33-2003. In determining the eligibility of a pupil for the gifted and talented program of instruction, the GATE Team (comprised of classroom relevant teachers and administration) may use alternative assessment procedures for a pupil from another culture, a pupil who is environmentally or economically deprived or a pupil who has a disability. The conclusions of the GATE Team concerning the eligibility of the pupil for the gifted and talented program of instruction will be based upon an assessment of the talent, cognitive abilities or academic achievement of the pupil. Unless the pupil's individualized educational program otherwise provides, a pupil who is gifted and talented must participate in not less than 150 minutes of differentiated educational activities each week during the school year.

A range of service delivery options will be available to meet each gifted and talented student's special needs based on the student's Gifted and Talented Educational Plan (GTEP) and will be

[10] See http://www.sde.idaho.gov/cnp/. Last retrieved June 26, 2019.
[11] Idaho Code §33-2001.

provided with administrative support to assure adequate funds for materials and professional development.

Plan Development
Once a student has been referred to the gifted and talented program, the gifted and talented teacher will notify the student's parent, teachers, and school psychologist. The school psychologist at PAI will fill out the appropriate forms and send home a written notice to inform the parents for the initial assessment for the gifted and talented program. Parents will sign consent to evaluate. The School Psychologist will administer appropriate cognitive assessments. The Gifted and Talented Eligibility Statement form will be used to determine eligibility in the gifted and talented program.

Parents will be considered partners with the schools in developing, reviewing, and revising the gifted plan for their child. The role of parents in developing such plans will include:

- Providing critical information regarding the strengths of their child;
- Expressing their concerns for enhancing the education of their child;
- Participating in discussions about the child's needs;

The team considers the following during development, review, and revision of the gifted plan:

- The strengths of the student and the needs resulting from the student's giftedness
- The results of recent evaluations, including class work and state or district assessments
- In the case of an ELL student the language needs of the student in relation the gifted plan.
- The plan for each student will be individualized, measurable, and observable.

Implementation
The gifted plan will be implemented immediately following the meeting and will be made accessible to each of the student's teachers who are responsible for the implementation. Each teacher of the student will be notified of specific responsibilities related to implementing the student's gifted plan.

Services and Instructional Strategies
The school will offer various services to meet the needs of the gifted and talented student. These services may include but are not limited to: Specialized gifted and talented courses, Acceleration, Ability grouping, Modifications of content through differentiated curriculum, Career exploration and goal setting integrated into the curriculum, Curriculum compacting, Enrichment, Social skills development and/or counseling, and Real-world immersion activities (i.e. as science and social studies fairs, exhibits, academic competitions, mentoring).

Curriculum will be vertically and horizontally enriching, providing those students who have mastered the grade-level Idaho Content Standards and PAI-offered opportunities for acceleration. Curriculum for gifted and talented students will include a wealth of opportunities for extended learning beyond the classroom.

Evaluations
The team shall consider the strengths of the student and needs resulting from the student's giftedness and the results of recent evaluations, including class work and state assessments. In

the case of a student with limited English proficiency, the language needs of the student as they relate to the IEP, will be considered when reviewing and revising the plan.
PAI will offer various services to meet the needs of the gifted and talented student based on the gifted plan. These services may include but are not limited to:

- Elementary School (K-5) Gifted Program -
    - Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and social studies fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum);
    - Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum); and
    - Ability grouping: (e.g. specialized gifted and talented courses, real social skills development and/or counseling).
- Middle School (6-8) Gifted Program - PAI will offer accelerated (gifted) content area courses (Mathematics, Science, Social Studies, and/or English Language Arts) and/or State-approved middle school gifted elective courses. All of the students in the gifted and talented course are eligible for gifted and talented services and the teacher is endorsed to teach gifted and talented students or on an approved waiver to complete the gifted and talented endorsement.

Enrichment Opportunities
Similar to the gifted plan, there will be a variety of enrichment opportunities that will be available to students performing at or above grade level as part of PAI's comprehensive strategy to ensure that all students are making accelerated academic progress these include but are not limited to:

- Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and social studies fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum);
- Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum); and
- Ability grouping: (e.g. specialized gifted and talented courses, real social skills development and/or counseling).
- Extended Learning Opportunities- Afterschool enrichment programs and clubs. All students will be included in the data driven instruction model (Data Methods and Systems) to ensure that all students are making academic progress even those who are performing at or above grade level.

Promotion/Retention
PAI is also committed to ensuring fair and equitable promotion and retention of our students in alignment with PAI's mission. Using real-time data from frequent assessment results, PAI will provide the necessary individual, classroom and/or school-wide intervention programs. The Data Team and along with teacher referrals will determine which students may need additional targeted interventions which include: requiring students to attend specific targeted tutoring, Early-Bird, during school, or afterschool; proving for supplemental intervention programs and support within the respective reading, math, science classrooms through academic coaching, lesson modeling, computerized intervention programs and pull out services (as needed). Parents of students who are in need of interventions (individual or other) will be notified throughout the

process. The teachers will work with students and families to accommodate schedules. A

Additionally, the Data Team will identify students that may need to be part of the RtI (Response to Intervention) process. If the Data Team and Classroom teacher should identify a struggling student that may be in need of retention, they will be referred to Pupil Promotion/Retention Team by the end of the first semester.

The Pupil Promotion/Retention Team may be comprised of a member of the administrative team, current teacher, next year's teacher, and special education teacher (if applicable). Administration is responsible for identifying the appropriate members of the team. The school will identify benchmarks and procedures for promotion at each grade level. Students who meet or exceed the benchmarks determined by the school will be promoted to the next grade level. Data to be considered may include attendance, state assessments, school and curriculum-based assessments, classroom observations, parent and teacher surveys, and classroom grades and work samples. The Pupil Promotion/Retention Team will review the data and make a recommendation or promotion to the next grade level or retention. The Team will then meet with the parent/guardian to discuss the data, recommendation, and social emotional concerns, and the options for their student. The team along with the parent will make a decision to promote or retain the student.

PAI will comply with State and Federal laws regarding the students with disabilities and IDEA in the case of students who are twice exceptions, e.g. they are both Gifted and Talented and they have an IEP.

Professional Development Plan

Pinecrest Academy of Idaho will develop a Professional Learning Community (PLC) atmosphere by using professional development throughout the school year to allow for common planning and teaching teams, both within grade levels and subject areas. Through professional development activities planned within the school calendar, teachers will have opportunities to reflect on practice, discuss research and cases of learning, and examine student work. Such a culture makes it safe for teachers to share universal goals, confront what is and isn't working, and transform their own thinking and practice.

A two-week summer institute will be scheduled at the start of each school year. For year one, given the importance of our endeavor, we will strive for three weeks of training and preparations with our teachers. Professional development will include:

Pinecrest Academy Instructional Model: This training will be provided by current Pinecrest Academy instructional staff across the Pinecrest system and will focus on the Pinecrest Instructional Model, provide classroom-level scope and sequence instruction including individual lesson plan materials for the classroom including: adopted curriculum, positive behavior support, supporting special needs students including special education, ELL and GATE learners.

Data Analysis: Teachers will acquire skills necessary to implement data-driven instructional decisions. This training will also provide teachers with the necessary skills for administration of school-wide adopted assessments.

Vertical Alignment (by subject and grade level): Teachers will be permitted common planning time by department in order to correctly align courses by quickly assessing what

students mastered in preceding grades and focusing on building skills and knowledge. This will eliminate the common problem of consuming valuable instructional time with unnecessary reviewing and re-teaching of skills that have already been mastered.
Horizontal Alignment (by grade level): The School will encourage teacher collaboration and cross-curricular planning, allowing all teachers of a common grade level to address specific subject matter following the same time line. Such alignment is crucial in school systems dealing with state-mandated, standards-based assessments. It also allows students to see interdisciplinary connections.
Building Emotional Intelligence: This training will provide teachers with the positive behavior support for social emotional learning of our students.
STEAM: This training will provide support to teachers on incorporating STEAM activities into daily instruction.
Ongoing Professional Development: The primary venue for ongoing professional development will be during staff meetings. Planning in-service training will be the responsibility of the principal based primarily on student achievement data (which can be measured through i-Ready assessments) and behavioral management issues. Secondarily, in-service training will provide opportunities to introduce or reinforce concepts taught in Summer Institute. Teachers with unique experience (reading therapy, special education, etc.) will be asked to lead in-service training when appropriate. Ongoing training topics will include the following:

- Using Student Information Systems
- Managing IEP and 504 students and records
- State Commission Performance Framework
- AdvancED Accreditation
- CMAS Administration Training
- Data reviews
- Maximizing i-Ready

In addition to on-site professional development opportunities, PAI plans to send instructional staff to content specific conferences. The expectation when attending these events will be for the attending staff to bring information back to the site and provide professional development to other teachers. These conferences may include:

- National Council for Teachers of Mathematics
- National Science Teachers Association
- International Literacy Association
- International Society for Technology in Education Conference
- National Charter School Conference
- ASCD Conference
- Annual Conference for Middle Level Educators

II. FINANCIAL AND FACILITIES PLANS

Fiscal Philosophy and Spending Priorities

The Pinecrest Academy of Idaho (PAI) Board will oversee all aspects of the fiscal management of the school and are dedicated to providing an enhanced educational experience by furnishing students with an academically challenging and personally meaningful learning environment with an emphasis on arts integration. The charter school budget will serve as the financial plan of operation for the charter school and will include estimates and purpose of expenditures for a given period and the proposed means of financing the estimated expenditures. Pinecrest Academy of Idaho will provide the budget and budget documents in accordance with the rules and regulations as specified by the Idaho Department of Education on an annual basis.

The governing body recognizes its responsibility to establish an unreserved fund balance in an amount sufficient to:

1. Protect the charter school from unnecessary borrowing in order to meet cash- flow needs;
2. Provide prudent reserves to meet unexpected emergencies and protect against catastrophic events;
3. Meet the uncertainties of state and federal funding; and
4. Help ensure a charter school credit rating that would qualify the charter school for lower interest costs.

In determining an appropriate unreserved fund balance, the governing body will consider a variety of factors with potential impact on the charter school's budget including:

1. The predictability and volatility of its expenditures;
2. The availability of resources in other funds;
3. The potential drain upon general fund resources from other funds;
4. Liquidity; and
5. Designations

Pinecrest Academy of Idaho has presented a fiscally conservative budget for their first 3 years of operation as well as a breakeven budget for their first year of operation in case student enrollment comes in lower than expected. Pinecrest Academy of Idaho's largest fixed costs are salaries & benefits with categories such as educational program items, technology, furniture, and supplies fluctuating with student enrollment. This is no surprise as the largest fixed cost is the most important; in order to successfully implement an educational program, being able to hire/retain dedicated school staff is top priority.

Utilizing Academica Nevada's standing relationship with the lending institution Vectra Bank will allow Pinecrest Academy of Idaho to lease all their furniture, fixtures, equipment, and curriculum in the first year of the school over a 48-month period. The lease will include a 5% residual purchase option at the end of the 48 months or an early purchase option in the 45th month for a 6% residual. The proposed campus will likely enter into this lease agreement in their first year of operation. Pinecrest Academy of Idaho budgets $1,000 per student to outfit the entire school in its first year of operation at a 5% interest rate over 4 years. The budget reflects projected FFE costs for the first three years of operation, these projected totals are divided into

the three equipment categories: curriculum, technology, & furniture/fixtures.

Transportation and Food Service Plans
Pinecrest Academy of Idaho will look to provide transportation to and from school and will contract out the service in its first few years. The budget has been based on rates given by Brown Bus Company (BBC), a well-established bus transportation company that provides school bus transportation to various Idaho schools. The budget reflects the transportation allowance of 60% of the projected transportation expenses. The transportation expenses are assumed at $325 per route per day, for 180 school days; utilizing one route for the first two years of operation, increasing to two routes in the third year of operation. Once established, the Pinecrest Academy of Idaho governing board will seek the appropriate bids for a bus transportation provider in compliance with Idaho Code.

As outlined in *Section IV*, PAI projects that 66% of the student population will qualify for free and reduced lunch. Standard kitchen equipment is factored into the amount of the anticipated building space and may include up to an oven, warming cabinet, double door refrigerator, and single door freezer. These items are included in the schools anticipated FFE lease mentioned in more detail in the subsection above. Additional start-up expenses may include food thermometers, a prep table, oven mitts, single use gloves, and other kitchen supplies.

Administrative costs are minimal and may include a date-stamp, envelopes, and mailing stamps. The school is looking into several options on how best implement the National School Lunch Program (NSLP), including talking with Emily Chatelain of School Food and Wellness Group on all options. First, we will seek to contract with a Vendor/School District to prepare specified meals under the NSLP. The school will also contact local restaurants to see if any of them would be interested in serving the school. If neither of these are possible, the school will evaluate the best way to implement it internally. The school will administer the application process for all free and reduced-price meals and will submit claims for reimbursement to the state. The budget assumes that meals will be paid for by students not eligible for these programs. The amount of $6,000 per year has been budgeted in Year 1 – 3 for any potential overages or one-time costs associated with providing food services. The operating costs associated with this expense are based on experience with similarly sized schools in other markets and initial consultations with food service providers in the Twin Falls area.

Financial Management and Monitoring Plan
As mentioned above, the Pinecrest Academy of Idaho Board will oversee all aspects of the fiscal management of the school. The auditors, accountants, and educational management company retained by the Board, will work as a team to develop financial statements and accounting reporting templates to ensure compliance with the state and federal reporting guidelines.

Additionally, Pinecrest Academy of Idaho intends to contract with Academica Idaho, an Educational Service Provider whose services to Pinecrest Academy of Idaho, shall include, but not me limited to, the following:

- Identification, design, and procurement of facilities and equipment
- Staffing recommendations and human resource coordination
- Regulatory compliance and state reporting

- Legal and corporate upkeep
- Public relations and marketing
- The maintenance of the books and records of the charter school
- Bookkeeping, budgeting and financial forecasting

For the services of Academica Idaho, an annual fee per student as structured below will be charged to Pinecrest Academy of Idaho. An early relationship with Academica Idaho allows Pinecrest Academy of Idaho to have some financial flexibility during its initial growth phase. The budget presented includes an Academica Fee schedule of the following:

Student Count	Fee
175 or Less	$ -
176-225	$10,000.00 (Flat Fee)
226-325	$75.00 (p/student)
326-425	$150.00 (p/student)
426-525	$225.00 (p/student)
526-624	$300.00 (p/student)
625 or more	$450.00 (p/student)

Academica will also provide Pinecrest Academy of Idaho with a $25,000 start-up loan for operational expenses in their first year of operation. This loan will be a non-recourse loan at an interest rate of 5% over 36 months. There will also not be any prepayment penalty on the loan.

Under the supervision of the Board Treasurer, and in conjunction with the school's audit firm, Academica Idaho will be responsible for the school's bookkeeping, financial reporting, and financial liability. The school principal will supervise the day-to-day cash collections at the school. The governing body, through the Board Treasurer, will receive and accept financial reports that include monthly bank statement reconciliations, estimates of expenditures for the general fund in comparison to budget appropriations, actual receipts in comparison to budget estimates and the charter school's overall cash condition. Supplementary reports on other funds or accounts will be furnished upon request of the governing body or administrator. Appropriate staff will be available at any governing body meeting, upon the governing body's request, to respond to questions and to present current financial information. The administrator will notify the governing body at any time of substantial deviations in the anticipated revenues and/or expenditures.

The governing body, through the Board Treasurer, will receive and accept financial reports that include monthly bank statement reconciliations, estimates of expenditures for the general fund in comparison to budget appropriations, actual receipts in comparison to budget estimates and the charter school's overall cash condition. Supplementary reports on other funds or accounts will be furnished upon request of the governing body or administrator. Appropriate staff will be available at any governing body meeting, upon the governing body's request, to respond to questions and to present current financial information. The administrator will notify the governing body at any time of substantial deviations in the anticipated revenues and/or expenditures.

The campus principal will be responsible for assuring budget allocations are observed and the total expenditures do not exceed the amount allocated in the budget. The Board will look to outsource payroll processes to a 3rd party vendor. Preparation of payroll, including time schedules and payroll periods, will be done in accordance with each employee's agreement with the governing body. Employee health, accident, dental, and other types of insurance will be provided as outlined in the agreements. Mandatory payroll deductions will be withheld as required by state and federal law. The person designated to draw all orders for the payment of monies belonging to the charter school is the principal, and the principal will work closely with the EMO. All claims for payment from charter school funds are processed by Academica Nevada in conformance with charter school procedures. Payment is authorized against invoices properly supported by approved purchase orders with properly submitted vouchers approved by the governing body.

Pinecrest Academy of Idaho intends to adopt and comply with the Idaho Financial Accounting Reporting Management System (IFARMS), developed by the Idaho Department Education. The function of charter school purchasing is to serve the educational program by providing the necessary supplies, equipment, and services. The governing body will appoint the purchasing agent. He/She will be responsible for developing and administering the charter school's purchasing program. Any officer or member of the governing body may incur no obligation unless that expenditure has been authorized in the budget or by governing body action and/or governing body policy. In all cases, calling for the expenditure of charter school money, except payrolls, a requisition and purchase order system must be used. Unless authorized by the administrator, no purchase will be authorized unless covered by an approved purchase order. No bills will be approved for payment unless purchases were made on approved orders. The administrator will review bills due and payable for the purchase of supplies and services to determine if they are within budget amounts. After appropriate administrative review, the administrator will direct payment of the just claims against the charter school. The administrator is responsible for the accuracy of all bills and vouchers.

Additionally, Pinecrest Academy of Idaho ("Licensee") will enter into a Trademark License Agreement with Pinecrest Academy, Inc. ("Licensor"). Pinecrest Academy, Inc. grants Pinecrest Academy of Idaho a non-exclusive, non-transferable, royalty-free license to use the trademark in connection with the development and establishment of the school of Pinecrest Academy of Idaho in the State of Idaho. The budget reflects this agreement as the Pinecrest Academy, Inc. Affiliation fee. This fee is 1% of state unrestricted revenue, half of which goes back to the school for Professional Development use and the other half going to Pinecrest Academy, Inc. for its collaboration, accreditation, and support. The budget reflects only the Professional Development half of the expense in Pinecrest Academy of Idaho's first few years of operation. The half of the fee that goes to Pinecrest Academy, Inc. will be charged once Pinecrest Academy of Idaho is able to financially sustain its cost. Please *see Appendix F5 – Pinecrest Affiliation Agreement* for more information.

Facilities Plan

PAI is actively searching for facilities options within its target community. Based on its proposed enrollment configuration, the school's eventual facility need is no more than 30,000

square feet at full build-out by year 5 of the charter. It is important to note that PAI's enrollment plans assume a slow growth model starting with approximately 190 students and expands by a grade per year with some modest adding of additional sections in existing grades.

PAI is in discussions with Twin Falls Reformed Church located 1631 Grandview Drive North, Twin Falls. The location is within the schools target community. This site includes over 12 classrooms, administration offices, cafeteria area, full size gym, commercial kitchen, outdoor play area and large parking area. The school would work with its architect to ensure the building meets all facility codes necessary to operate a public charter school. PAI will look to enter into a short term lease, 1-3 years, with Twin Falls Reformed Church.

PAI will look to construct a long term facility after it's first or second year of operation. For it's long-term facility PAI will look to build a facility that accommodates the school's enrollment at full capacity or 489 students. PAI estimates that the long-term facility it constructs will be 60-75 sf per student, with a large field space. The school is in discussions with groups such as Hawkins Companies, Galena Fund, and Building Hope among others about purchasing a facility and creating a stair step rent schedule that would allow the school to build up enrollment until it can afford a full rent payment. PAI is also currently in preliminary discussions with leaders from from Twin Falls Reformed Church which are subject to further development upon receipt of evidence of an approved charter. Until a charter is granted, a specific arrangement cannot be established. At this time, however, the founding team has begun steps that will facilitate the process once a charter has been awarded. Additionally, our preliminary exploration indicates that rent costs at either facility fall within the projected cost per square foot that we used to generate our budget assumptions for the facilities line item.

For further information regarding these facilities, please see see *Appendix A5: Facility Options*.

III. Board Capacity & Governance Structure

Governance Structure

The Pinecrest Academy of Idaho (PAI) is organized exclusively for educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code. The governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The policies, procedures, powers, and duties, by which the board will operate, including specific member powers, are detailed in the attached bylaws.

Board members will serve five-year terms, and board members may serve no more than two terms. Terms will be staggered so that no more than half of the board will be up for election in any one year, unless a vacancy needs to be filled.

The officers of the governing board will include a chair, vice chair, secretary, treasurer, and such other officers, as the board will deem necessary to elect. The board will elect and appoint all officers at the annual meeting of the board. Officers will serve a one-year term and may serve consecutive terms in any office. The officer responsibilities are as follows:

- Board Chair – The chair will preside at all meetings of the board. The chair will possess the power to sign all certificates, contracts, or other instruments of the school that are approved by the board.
- Vice Chair - In the absence of the chair, or in the event of the chair's disability, inability, or refusal to act, the vice chair will perform all of the duties of the chair and will have all of the powers of the chair. The vice chair will have such other powers and perform such other duties as may be prescribed from time to time by the board or by the chair.
- Secretary- The secretary will keep the minutes of the board with the time and place of holding, whether regular or special and if special, how authorized, the notice thereof given, the name or names of those present at the board meetings and the proceedings thereof. The Secretary will give notice of all the meetings of the board required by law.
- Treasurer – The treasurer will have oversight responsibility and adequate and correct accounts of the properties and business transactions of the school, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses. The books of account will at all times be open to inspection by any board member. The treasurer will be charged with safeguarding the assets of school and he or she will sign financial documents on behalf of the school in accordance with the established policies of the school. He or she will have such other powers and perform such other duties as may be prescribed by the board from time to time.

The board will be composed of between five and nine members, as set or adjusted by the governing board. The bylaws state that the board will seek to maintain a membership that is representative of the community and possesses the breadth of knowledge and experience to effectively support and direct the operation of the school. To support this, the board will endeavor to maintain a membership which includes:

- At least two parents of enrolled students;
- An active or retired licensed educator;
- An individual with expertise in the areas of Accounting and/or Finance; and,

- An individual with expertise in the areas of Law and/or Human resources.

Any board member of the school may be removed by two-thirds of the members then in office, excluding the member at issue, whenever such removal would serve the best interests of the school. Any member may resign at any time and their resignation will be effective upon receipt by the Chair of a written communication.

Governing Board

As mention previously, the policies, procedures, powers, and duties by which the board will operate are detailed in the attached bylaws. A brief overview of those powers include:

- Ratify the school's mission and vision statements, and any modification thereof
- Establish and approve all major educational and operational policies
- Develop and approve an annual budget and financial plan
- Approve any management, operational, and service contracts
- Exercise continual oversight of the charter school's operations
- Select an independent accountant to perform an annual audit, and review and approve the audit report
- Hire and supervise an administrator who will oversee the day-to-day operations of the charter school

Additionally, Board members will:

- Understand the approved curriculum and agree with the educational philosophy, discipline policy, and administrative structure of the school
- Attend PTO meetings or events to show support and encouragement for the school
- Attend a yearly board retreat where the goals of the board are defined, and a board self-evaluation will be conducted to critique the performance of the board during the past year
- Participate in professional development trainings
- Know and abide by the Idaho Open Meetings Law for open meetings.

Furthermore, PAI's bylaws state that the board may create by resolution an Academic Committee, a Governance Committee, a Financial Committee and 1 or more other committees, which may exercise such authority in the management of the school as provided in such resolution or in the school bylaws. Each committee created will consist of at least one board member and will include key stakeholders from the school community.

School Principal

The school principal, hired by the board, will be responsible for all aspects of day-to-day administration of the school within the scope of operating policies, procedures, and budgetary functions as adopted and approved by the governing board. The principal will delegate duties to administrative support staff to ensure that daily operations, resources, policies, and procedures are being implemented in accordance with the school's mission. The principal will hire, oversee, and evaluate faculty and staff. The principal will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school including procedures for curriculum and instruction, classroom management, faculty and staff evaluation, data analysis, testing, support services, parental communication, professional development, discipline, community outreach, oversight of facilities, and internal financial controls. The principal will

report to the board on the school's operations and finances and is expected to communicate with the board as often as needed by the school or board members to ensure the school's operational needs are met. The governing board will conduct an evaluation of the school principal annually.

Teachers and Staff

All school personnel will report to the principal. The principal will determine the most appropriate staffing requirements and structure for the administrative office, who will report directly to the principal. Teachers and staff will be responsible for carrying out the procedures in their duties, activities, and interactions with students, teachers, and parents of the school.

Management Provider

PAI will be contracting with Academica as its Educational Service Provider, as detailed in *Section V.* Academica's services are designed to allow the Principal and the Governing Board to focus on day-to-day school operations. Academica's services include, but are not limited to:

- Assist the Board in creating budgets and financial forecasts;
- Assist the Board in preparing applications for grant funds;
- Monitor and assure Compliance with all state reports;
- Assist the Board in locating and securing a school facility;
- Maintain the financial books of the school;
- Assist with systems development;
- At the Board's direction, prepare agendas and post notices of all board meetings;
- Assist the Board in identifying and retaining an employee leasing company;
- Provide human resources related services such as dispute resolution and contract preparation and review and;
- Assist the Board in renewing the School's charter.

Board Member Qualifications

Pinecrest Academy of Idaho's founding board consists of a diverse group of people that meets the experience and skills necessary to successfully oversee the school, as detailed below:

Alex Castañeda

- Real estate, Hispanic Chamber of Commerce
- Customer service, bilingual (Spanish/English)

Connie Stopher

- BA, Political Science; MA, Public Administration
- Economic Development, Human Resources

Lucy Keaton

- BA, Education; MA, Educational Leadership
- Former Pinecrest Principal, Exemplary Turnaround Schools

Rogelio Villaseñor

- Certificate in Law Enforcement, Core courses in Associates of Liberal Arts
- Employment Training, Management, Workforce Programs

Transition Plan

Once the charter is approved the board will transition to its role as a governing entity. The board anticipates to be a working board prior to the school opening and will both govern and assist

with operations since minimal staff will be in place. With the mission and vision in the forefront, the board will do anything and everything to help get the school off the ground, from seeking facilities to developing programs.

Once a principal is identified and hired, all management duties will be transferred to him or her. The board may still assist the principal until the school opens, but the goal is to transition away from operations. Systems will be developed to allow the board to effectively provide appropriate oversight, and the board will shift its focus to strategic issues and building the school's reputation.

PAI structured its founding committee with the governing board role in mind. None of our members are seeking employment at the school, and all joined the committee because they are passionate about the school's mission and believe they bring an expertise to ensure the school is successful and to perform as guardians of the "public trust."

Board Member Recruitment and Training

As mentioned before, the board strives to maintain a governing board that possesses the breadth of knowledge and experience to effectively support and direct the operation of the school, as well as is representative of the school community. The bylaws outline that the board shall seek to have the following minimum board competencies:

- At least two parents of enrolled students;
- An active or retired licensed educator;
- An individual with expertise in the areas of Accounting and/or Finance; and,
- An individual with expertise in the areas of Law and/or Human resources.

As vacancies arise, the board will search for the best-qualified candidates, to maintain compliance with the board's bylaws. The board will develop a written job description of the qualifications and will advertise vacancies by posting the description on the school's website and other free or low-cost venues. We will also disseminate it through direct communication to the parents of all enrolled students, requesting referrals of individuals with the requisite skills, beliefs, and behaviors necessary to be effective and engaged board members. Individual board members will also circulate the notice within their professional communities and we will actively seek out opportunities to broaden our networks to recruit individuals who reflect the broader community and believe wholeheartedly in our mission and vision. Notice of the governing board's intentions to elect board members will be included in the agenda for that meeting and publicly announced in accordance with open meeting requirements. Newly created board member positions resulting from an increase in the number of board members comprising the board, and all vacancies occurring on the board for any reason, will be filled by a vote of the majority of the members in office at a duly organized meeting of the governing board.

Current board members attended the Charter Start! Workshop conducted by the Idaho Department of Education's Office of School Choice. The two-day workshop covered topics on ethical and effective board governance, the charter petition process, charter school financing, accountability, and other topics relevant to starting a governing a new charter school. Between January and August 2020, the board will participate in additional trainings that cover: Open meetings law, public records request, governing board roles and ethics, financial oversight,

school leader evaluation, and academic achievement data analysis.

At the conclusion of the first year, and annually thereafter, the board will participate in a board retreat. The retreat will be a time to analyze ISAT scores and other assessment data from the prior year; complete a board self-evaluation; develop/modify a strategic plan; and set measurable performance goals for the principal based upon his/her last year's performance review, student achievement and growth, school system health, and leadership. The self-evaluation will use an evaluation tool to rate the board's performance on factors including:

- A solid board foundation (well-drafted charter contract and board bylaws, financial and legal status clear and well-understood, strategic plan in place)
- Board operations (new members oriented, members collectively possess a range of expertise, meetings well-planned with clear agendas, strong board chair, meeting norms, minutes are taken and promptly approved, members prepare for meetings and participate constructively, process in place for addressing ineffective, destructive or absent board members, committees have clear scope)
- Relationship with Principal (clear performance goals in place, plan for succession, board has understanding with staff regarding board vs. principal responsibilities)
- Budget/Finance (adopts annual budget, monitors budget throughout the year, contracts with independent auditor, adopted a long-term financial plan, fiscal management policies in place, board oversees fundraising activities)
- Student Achievement (board has adopted student achievement goals, assessment data is reviewed and analyzed by the board throughout the year, school reports on student achievement to authorizer)

Based on the self-evaluation, authorizer feedback, and stakeholder input, the board will develop a training schedule for the upcoming year. The board will also ensure ongoing training on applicable Idaho laws, policies, and legislation affecting charter schools.

IV. STUDENT DEMAND & PRIMARY ATTENDANCE AREA

Primary Attendance Area
As a public charter school, Pinecrest Academy of Idaho (PAI) is open to all residents in the state of Idaho. However, PAI's target attendance area will most likely focus on our families and students in the Twin Falls, Idaho area. PAI's proposed school facility, for at least its first year of operation, will be located at Twin Falls Reformed Church located at the following address: 1631 Grandview Dr. N, Twin Falls, ID 83301.

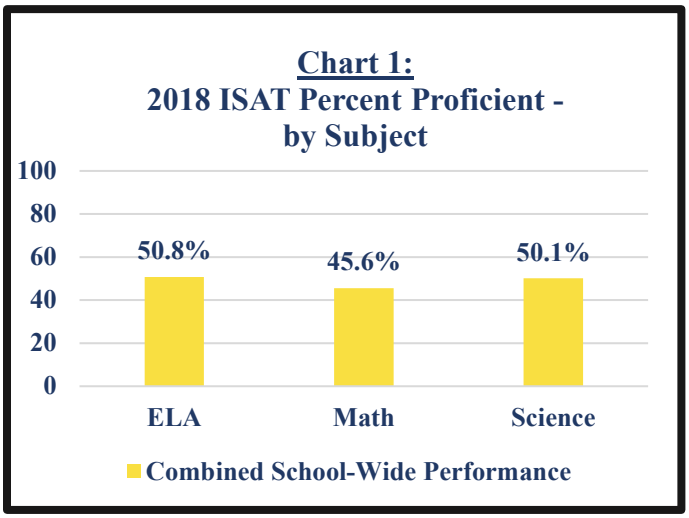
In order to determine the primary attendance area, our committee to form focused on the schools within a 5-mile radius of the proposed location. The school district zoning boundaries of these schools will define the primary attendance area for the purpose of identifying students who are eligible for the relevant preference in your enrollment lottery. Those schools include the following elementary and junior high schools:

- Bickel Elementary School
- Bridge Academy
- I B Perrine Elementary School
- Lincoln Elementary School
- Morningside Elementary
- Oregon Trail Elementary School
- Robert Stuart Jr High School
- Sawtooth Elementary School
- Vera C O'Leary Jr High School

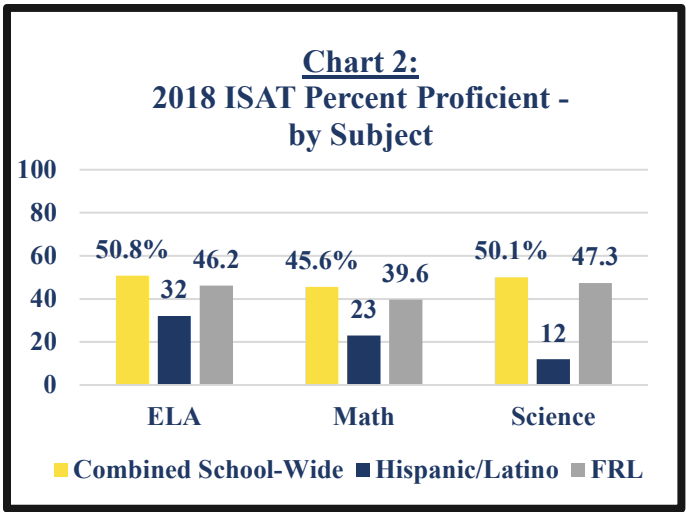
We chose this area because of the need of a high quality school option, as explained further below, and because of the increase in the student population in the area. The population of Twin Falls School District has increased significantly over the past few years. There was a 23.5% increase in the student population between 2010 and 2017[12]. To assist with the population growth, the school district built two new elementary schools, one of which filled to capacity in just two years.[13] Pinecrest Academy of Idaho will help relieve the overcrowding at current schools, while also giving families a high quality school option.

Student Need and Demand
Based on the most recent academic performance information, these schools have struggled with significant achievement gaps, as demonstrated in **Chart 1**:

[12] Wooton-Greener, Julie (2018) 'Magic Valley schools weigh options to deal with enrollment growth' *MagicValley.com,* 2 August. Available at: https://magicvalley.com/news/local/education/magic-valley-schools-weigh-options-to-deal-with-enrollment-growth/article_a3f025cc-4a9a-5322-b73d-9ff2c5aa4b85.html
[13] Ibid.



Proficiency scores shown in **Chart 1**[14] have been averaged together for all grades from all public schools within a 5-mile radius of PAI's proposed location. Based on these 2018 ISAT results, only 50.8% of the students in the community are proficient in English language arts (ELA), while only 45.6% are proficient in mathematics and 50.1% are proficient in science. What's more, these proficiency results are even poorer when examining specific student subgroups, such as: Hispanic/Latino students and students that participate in the Free and Reduced Lunch program. Because of data privacy laws, the Idaho Department of Education was not able to provide data for the other subgroups for most of the schools used in the analysis. Please see **Chart 2**[15] below:



These student proficiency results demonstrate a need for families and students of the community to attend a quality school with a rigorous and unique approach to preparing students for success in life. The educational philosophy at Pinecrest is anchored by the key areas of collaboration,

[14]Idaho Department of Education. School Report Cards. *Idaho School Finder*. https://idahoschools.org/; last accessed June 2019.
[15] Ibid.

communication, creativity and critical thinking. These four skills have been identified by Partnership for 21st Century Skills as "super skills" necessary to thrive in the future. Pinecrest's educational model ensures that achievement gaps are closed and that every student progresses using research-based strategies and curriculum that have proven effective for students at all levels, but especially for at-risk students. By providing students with Pinecrest's STEM and Blended Learning program, students become competent global citizens who are college and career ready.

As stated earlier, PAI is a replication of the highly successful Pinecrest Academy charter school network located in both Nevada and Florida. This network has demonstrated success with diverse, at-risk student populations, including students qualifying for Free/Reduced Lunch (FRL), ELL students, and Students with Disabilities. What's more, the Pinecrest Academy network schools in Nevada provide a very close representation of our expected demographic, demonstrating that the network's success can be replicated here. The Nevada schools' largest minority demographic subgroup, Hispanic students (22%), closely matches the analyzed schools' largest minority subgroup, also Hispanic (23%), and there is the same percentage in Students with Disabilities (10%).

The Pinecrest school network in Nevada is the highest rated charter school network in the state. The Nevada Department of Education scores each elementary, middle and high school on the Nevada School Performance Framework (NSPF) and gives a school a star rating from 1 to 5, with 1-star being the lowest rating and 5-star being the highest. Each Pinecrest elementary and middle school (a total of 8 schools) received a 5-star rating. "A five-star school recognizes a superior school that exceeds expectations for all students and subgroups on every indicator category with little or no exception. A five star school demonstrates superior academic performance and growth with no opportunity gaps. The school does not fail to meet expectations for any group on any indicator. These schools are recognized for distinguished performance."[16]

The subgroups with the Pinecrest of Nevada (PAN) network have also outperformed the state and the school district in which the schools are located. **Table 1** shows the difference in percent proficient of the subgroups in elementary school within PAN to the overall state proficiency in Math and ELA. **Table 2** shows the data for middle school. Historically, underperforming subgroups would have proficiency rates that are less than the state's overall proficiency rates. As you can see in the tables, most of the subgroups within PAN are close or greater than the state's overall proficiency percentages.

Table 1

% Proficient - Elementary School		
	2017-18 Math	2017-18 ELA
State (overall)	43.4	50.1
PAN (overall)	70.3	76.3
IEP	38.3	39.3
ELL	39.0	52.1

[16] *2018 Nevada School Performance Framework Procedures Manual.* Page 72. http://nevadareportcard.nv.gov/DI/Content/pdf/2018_NSPF_Guidance_Final_8-21-18.pdf

FRL	51.5	65.3
Black	55.0	68.1
Hispanic	61.4	71.4

Table 2

% Proficient – Middle School		
	2017-18 Math	2017-18 ELA
State (overall)	32.4	47.8
PAN (overall)	51.7	72.7
IEP	16.8	20.7
ELL	10.0	20.5
FRL	37.7	48.8
Black	19.4	43.2
Hispanic	44.1	51.4

There are a few subgroups that are struggling, but PAN has been making progress with these subgroups. As part of the NSPF rating, the Department of Education calculates how each school closes the opportunity gap. Closing the opportunity gap is determined as the percentage of students meeting their Adequate Growth Percentile (AGP) who did not pass the state assessment from the previous year. **Table 3** shows the percentage of students who met their AGP in ELA and Math during the 2017-18 school year who had not passed the state assessment during the previous school year. The NSPF gives up to 20 points for the Closing Opportunity Gaps category, and **Table 3** also shows the score each campus received providing further evidence that the Pinecrest Academy of Nevada network is a high quality charter school.

Table 3

Campus	Math ES	ELA ES	Score	Math MS	ELA MS	Score
Inspirada	42.4%	53.8%	20/20	26.6%	65.3%	20/20
Cadence	28.0%	55.2%	15/20	22.4%	37.5%	19/20
Horizon	32.8%	44.6%	13/20	34.8%	61.9%	20/20
St. Rose	35.4%	44.4%	14/20	24.2%	37%	20/20

Student Population

PAI's target population has been projected by examining the schools listed above. Please see **Table 4**[17] and **Table 5**[18] below:

Table 4

Target Population – Ethnic Demographics						
Am. Indian/ AK Native	Asian	Black/ Afr. – American	Hispanic/ Latino	White	Nat. HI / Pacific Isl.	Multi-Racial

[17] Idaho Department of Education. *Idaho School Finder.* http://www.idahoschools.org ; last accessed June 2019.
[18] Ibid.

0%	4%	3%	23%	68%	1%	1%

Table 5

Target Population – Subpopulations		
ELL	FRL	SWD
19%	66%	10%

PAI anticipates serving a similar population demographic that is majority White (68%) as well as having a high percentage (66%) of students who qualify for Free and Reduced Lunch (FRL) services and a large percentage of English Language Learners (19%). In short, PAI recognizes these demographic projections demonstrate a population with a variety of backgrounds and needs, which will be adequately addressed by the school.

Enrollment Capacity

PAI plans to open in August of 2020, with grades K-5, and will add subsequent grades until it reaches grade 8, as shown in **Table 6**. The total school capacity is expected to be 489 at full build out.

Table 6

Grade	2020-21	2021-22	2022-23	2023-24	2024-25
K	40	40	40	40	40
1	40	40	40	40	40
2	42	42	42	42	42
3	21	42	42	42	42
4	25	25	50	50	50
5	25	25	25	50	50
6	-	50	75	75	75
7	-	-	50	75	75
8	-	-	-	50	75
Total	193	264	364	464	489

Tables 1 and **2** above show the estimated percentages of ethnic demographics and estimated percentages student subpopulations.

PAI will comply with Idaho's class size ratio goals and has planned for teaching staff accordingly. **Table 7** shows the proposed staffing of the school during the first five school years.

Table 7

TEACHING STAFF	20-21	21-22	22-23	23-24	24-25
Classroom Teachers	8	11	15	19	20
SPED Teachers	1	1	1.5	2	2
Art Teacher	0	0	1	1	1
Music	0	0	1	1	1

PE Teacher	0	0	0	1	1
Technology (STEM)	0	0	0	1	1
Additional Elective Teachers	0	0	0	1	2
Total Teaching Staff	**9.00**	**12.00**	**18.50**	**26.00**	**28.00**
ADMIN & SUPPORT					
Principal	1	1	1	1	1
Assistant Principal	0	0	0	1	1
Office Manager	1	1	1	1	1
Receptionist	0	0	1	1	1
Teacher Assistants (Including SPED)	0	0	2	6	7
Campus Monitor/Custodian	0	0	0	1	1

Community Partnerships and Local Support
Community partnerships are extremely important as it broadens the student's opportunity to be exposed to the quality curriculum and educational experiences during the school day and outside the school day. PAI will seek partnerships with community organizations that enrich the after-school programs, field trips, guest speakers, etc.

Early relationships that have been cultivated that will help amplify our students' educational experiences include:

- Academica Nevada
- Pinecrest Inc.
- Jostens
- AdvancED

PAI's plan for student recruitment involves a wide array of media and materials to promote the school to ensure that the school reaches the widest possible audience. Promotional flyers and/or brochures will be distributed via direct mail as well as to community groups and churches to ensure that harder-to-reach families are aware of the school and their eligibility to apply for enrollment. Digital and social media marketing/advertising will be used in order to reach out to a broad audience through ads which direct parents to click on the school's website. Examples of social and digital marketing/ads include: Ads on Facebook, Digital ads on Pandora, Sponsored ads on Instagram, and Google Ads. Informational materials will be available in multiple languages, as needed. The school commits to using Social Media accounts as a means to promote the school and inform the community of the school's opening. The school will tailor its social media strategies to target specific audiences including local businesses and community organizations.

The School will distribute press releases and/or public service announcements to various media outlets to promote the open enrollment period, open house and other essential details about the school and its programs. A banner will also be posted on site with relevant information, including the school's website information, grade levels to be served, and phone number. PAI will host informational meetings either on the school site or a nearby location which would be accessible to all interested in attending the school. These events would be promoted in the same

manner as listed above. During the informational meetings, the school will highlight its program and how it will serve all students.

Once opened, parents and community partners will be encouraged to inform family, friends, and their community groups about the School. Local elected officials and community leaders will be invited to visit the School. They will also be given an update on the program's growth and will be asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

PAI has secured an interest-free loan and plans to spend $10,000 of these start-up funds for advertising/marketing as outlined in the chart below.

Timeline	Item	Cost
December 2019 – March 2020	Develop PAI website	$ 1,500
December 2019 – March 2020	Create Facebook page and other possible social media outlets	$ 0
December 2019 – March 2020	Create and print flyers/brochures with information about the educational program	$ 2,500
January-March 2020	Continue conversations with business and community leaders about the school and its purpose.	$ 0
March-June 2020	Host informational nights for potential families and collect contact information	$ 100
March-June 2020	Purchase banners to place at the school site upon approval	$ 2,500
May-August 2020	Distribute press releases announcing approval of the school and to promote open enrollment period	$ 700
May-August 2020	Create and distribute direct mail pieces that includes additional information about enrollment procedures	$ 1,500
May-August 2020	Run social media ads	$ 1,100
May-August 2020	Host various informational nights for parents interested in learning more about the school program and enrollment procedures	$ 100

Enrolling Underserved Families

To recruit all students fairly in the target area, we are using comprehensive outreach and marketing strategies to ensure that potentially interested students and parents have equal access to apply and enroll at the school. These include recruiting and marketing initiatives that target the entire community, provide information for economically disadvantaged students and families, those who may have limited English proficiency, special physical or academic needs, or may be at risk of academic failure.

PAI will market the opening of the school via multiple modes to ensure that all families are informed of their educational options. A grassroots recruitment campaign is especially important to make sure that "harder-to-reach" families (e.g. single-parent families, low socio-economic households, second language families, etc.) are aware of the choice program and their eligibility

to apply for enrollment. A grassroots marketing campaign includes: a school website, Facebook, flyers, direct mailers, advertisements in varying media, building relationships with community groups, and a "door to door" approach. The School will post flyers in local public facilities such as the post office, community centers, libraries and other locations of public access, and will also use banner advertisement on the proposed location.

Marketing materials will contain inclusive language to inform parents that all students are welcome to apply to PAI regardless of their socioeconomic status, race/ethnicity, home language, or enrolled academic program (Special Education, English Language Learners). The school's website will be built with language translation options. Informational meetings will be hosted at varying times during the day to accommodate different work schedules.

Additionally, children of full-time employees will be included in the First Preference Category of the Equitable Selection and Enrollment Process.

V. School Leadership & Management

Top-performing charter school networks identify two competencies that will drive our recruitment of an outstanding school leader*, leadership practice and student outcomes*.[19] Leadership practice consists of the actions that principals take to drive increased student outcomes. We describe these actions in five categories, or standards:

1. Learning and Teaching: The actions a principal takes to drive dramatic student achievement gains though the development and support of effective teaching.
2. Shared Vision, School Culture and Family Engagement: The actions a principal takes to create a vision of high achievement supported by a culture of high expectations and family engagement.
3. Strategic Planning and Systems: The actions a principal takes to manage and monitor school systems and operations., including those that impact financial and organizational outcomes.
4. Talent Management: The actions a principal takes to develop and maintain a high-quality, effective teaching staff.
5. Personal Leadership and Growth: The actions a principal takes to demonstrate effective leadership through self-reflection, change management, and clear communication.

To fulfill those endeavors, PAI recognizes that the domains included in the *Idaho Standards for Effective Principals* are essential to a successful school.

PAI plans to hire a school leader that promotes success for all students through a positive school culture, effectively communicates the school's mission and vision, and advocates for education to all stakeholders to garner support and involvement. The school's Educational Service Provider, Academica, will assist with the advertising of the principal position and collection of application packets. A rubric will be developed with the board to identify 'must haves' in applicants and determine which candidates will be interviewed. Sample interview questions will be provided to the board, and the board will be conducting principal interviews and making final decisions on the candidate selected.

The Principal is responsible for communicating school culture to all employees. This process begins during the interview for employment. Candidates for employment at PAI will be screened for personal mission, vision, and pedagogical beliefs. Candidates that have beliefs that closely align to the school's mission and vision and have the necessary pedagogical skill set will be offered employment. In addition, every classroom will display PAI's mission and vision. The building's culture will show the beliefs of the school through the consistent mission and vision being posted.

The principal will promote a collaborative leadership style that fosters shared leadership to capitalize on the expertise of individual leaders within the school and build capacity in teacher leaders through the promotion of professional development opportunities and self-reflection. The school leader will establish accountability for all based on professional, legal, ethical and

[19] See https://cdn.americanprogress.org/wp-content/uploads/2016/09/30112946/CharterLeadership.pdf. Last retrieved June 20, 2019.

fiscal standards. To develop and build leadership capacity, subject-level lead teachers are chosen and provided leadership opportunities. Teacher leaders meet with administration weekly to establish goals and provide feedback. This collaboration with lead teachers will ensure teachers are able to give feedback and directives in collaborative teams with their colleagues. Collaborative teams held daily will ensure that all PAI systems are consistently enforced and evaluated for effectiveness.

Finally, the school leader will have strong instructional leadership background in order to facilitate the school's vision, goals, continuous improvement of instruction, evaluation of teachers and the recruiting and hiring of teachers. Through the affiliation with Pinecrest Academy of Nevada and Pinecrest Academy, Inc. in Florida, current administrators and school leaders will be responsible for coaching and training of PAI principal in the domains set forth in the Idaho Principal Evaluation Framework. This evaluation tool focuses on student achievement, instructional leadership, organizational leadership, and professional and ethical behavior, among other criteria. Additionally, the Principal will be evaluated in three stages through-out a school year:

1. Beginning of school year – Establish goals
2. Mid-Year Evaluation (Based on Idaho Principal Evaluation Framework)
3. End-of-Year Evaluation (Based on Idaho Principal Evaluation Framework)

The Principal and/or designated academic supervisor will conduct formal evaluations of classroom teachers and other instructional personnel annually. Because of its affiliation with Pinecrest Academy, PAI has adopted the Evaluation System for Classroom Teachers and Other Instructional Personnel developed by the Florida Consortium of Public Charter Schools. This tool will be used to create classroom communities that are intellectually active and where students assume a large part of the responsibility for the success of the lesson through monitoring of their own learning. Teachers will be involved in a collaborative evaluation process between the evaluator and themselves.

PAI's and Pinecrest Academy Inc.'s (Pinecrest Inc.) affiliation is a key partnership in the success of the proposed leadership and curriculum development plans, as PAI plans to replicate the highly successful model of Pinecrest Academy Inc. (Pinecrest Inc.). Pinecrest Inc. has successfully opened and implemented this model and best practices at their schools in Florida and Nevada. With special distributions from the state of Idaho, Professional Development funds and Continuous Improvement Plans and Training funds will be accessed to provide high quality training to PAI administration and staff to ensure a successful replication.

Pinecrest Academy, Inc. is a high-achieving charter school network that currently operates 13 schools across 9 campuses in Florida and 4 campuses in Nevada. Since its inception in 2000, the organization has maintained a proven track record of success in raising student achievement while decreasing the achievement gap for disadvantaged student populations. As of the 2016-17 school year, seven Pinecrest schools were designated high performing schools by the Florida Department of Education, having met all criteria specified and all campuses in Nevada earned five-star ratings.

Pinecrest Academy of Idaho will evaluate its affiliation with Pinecrest Academy, Inc. three times during the year, similar to its evaluation of the Principal and its service provider, Academica Nevada. Goals will be established at the outset of the school year and services will be evaluated at a mid- and end-of year evaluation. The rubric used for this evaluation is currently under development and will obtain approval from Pinecrest's Governing Board once finalized.

2017-18 Accountability Data from Pinecrest Nevada Schools

Campus	Star Rating	Total Enrollment	Elem ELA Proficiency	Elem Math Proficiency	Middle School ELA Proficiency	Middle School Math Proficiency
PA Horizon	5	866	71.9%	63.6%	72.6%	48.9%
PA Cadence	5	1261	69.4%	65.4%	64.5%	45.5%
PA Inspirada	5	1017	85.3%	80.4%	88.1%	61%
PA St. Rose	5	982	82%	75.4%	70.6%	55.9%

Each Pinecrest school benefits from the support and scrutiny of several entities including the governing board and Academica. The Pinecrest of Idaho Board will be responsible for the affairs and management of the school and will provide continuing oversight of all school operations. The Governing Board of the school is the ultimate policy-making body that determines the academic direction, approves curriculum, and oversees operation of the school.

In 2017, Pinecrest Academy, Inc. achieved corporate accreditation for their network of schools. This has allowed Pinecrest to create unified standards, policies, and best practices, ensuring that all schools that are replicated stay true to the network's mission, vision and academic standards. All Pinecrest Academy, Inc. schools share: 1) a common philosophy/expectation of student excellence; 2) a commitment to instill a college bound mindset at every level of education; 3) an assurance to implement rigorous and standards based instruction; 4) an expectation of parental commitment and partnership in the academic career of their child; 5) and a collaborative management infrastructure to ensure implementation of the Pinecrest model with fidelity; and 6) necessary support for all schools to not only ensure continuous improvement but also quality outcomes. These commitments and corporate values have yielded success for the Pinecrest schools and further support the organization's capacity to replicate the Pinecrest model.

Leadership Team

The Pinecrest Academy of Idaho governing board will be the ultimate policy-making body with the responsibility of operation and oversight of the school including academic direction, curriculum, and budgetary functions. The policies, procedures, powers, and duties by which the board will operate, including specific member powers, are detailed in the attached bylaws. A brief overview of those powers and duties are as follows:

- Ratify the school's mission and vision statements, and any modification thereof
- Establish and approve all major educational and operational policies

- Develop and approve an annual budget and financial plan
- Approve any management, operational, and service contracts
- Exercise continual oversight of the charter school's operations
- Select an independent accountant to perform an annual audit, and review and approve the audit report
- Hire and supervise an administrator who will oversee the day-to-day operations of the charter school

The school principal, hired by the board, will be responsible for all aspects of day-to-day administration of the school within the scope of operating policies, procedures, and budgetary functions as adopted and approved by the governing board. The principal will delegate duties to administrative support staff to ensure that daily operations, resources, policies, and procedures are being implemented in accordance with the school's mission. The principal will hire, oversee, and evaluate faculty and staff. The principal will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school including procedures for curriculum and instruction, classroom management, faculty and staff evaluation, data analysis, testing, support services, parental communication, professional development, discipline, community outreach, oversight of facilities, and internal financial controls.

Faculty and staff will be responsible for carrying out these procedures in their duties, activities, and interactions with students, teachers, and parents of the school. The principal will report to the board on the school's operations and finances and is expected to communicate with the board as often as needed by the school or board members to ensure the school's operational needs are met.

PAI will be accountable to the public through the school's goals and accountability measures. Furthermore, Pinecrest Academy of Idaho will continue to work closely with the Parent-Teacher-Student Organization and the School Accountability Committee to ensure that all members of the community have an active voice in the school's governance and operations.

In compliance with *Idaho Standards for Effective Principals,* the administrator's evaluation must be based on the following components:

Domain 1: School Climate
Domain 2: Collaborative Leadership
Domain 3: Instructional Leadership

The governing board will conduct formal administrator evaluations annually. The evaluation systems for school administrators will:

- Promote success for all students by sustaining a positive school culture and instructional program that is conducive to student learning and continued professional development.
- Foster a collaborative leadership structure by seeking input from stakeholders and establishes high standards for professional, legal, ethical, and fiscal accountability.
- Be designed to support effective instruction and student learning growth, and performance evaluation results must be used when developing school improvement plans.
- Assess teacher performance using the Danielson Framework for Teaching which includes timely feedback and criteria for continuous quality improvement of the professional skills of

instructional personnel, and performance evaluation results will be used when identifying professional development.
- Include a mechanism to examine performance data from multiple sources, including opportunities for parents to provide input into employee performance evaluations when appropriate.
- Differentiate among four levels of performance as follows:
  1. Distinguished
  2. Proficient
  3. Basic
  4. Unsatisfactory

Educational Services Provider

The founding team believed that it would be in the best interest of the school to hire an experienced and successful management company to assist in the planning and creation of the new charter school, and so that the school staff and administration can focus on implementing the school's mission and vision and concentrating on student achievement. Contracting with an EMO will ensure that the business operations are maintained and that the governing board is supported. The Committee chose Academica because they have experience in successfully helping to open and support quality charter schools in the Nevada, Colorado, and Arizona, which currently total 24 separate campuses and nearly 20,000 students. In addition, the Committee feels that Academica's services in assisting the Board with financial management, financial oversight, board meeting management and statutory compliance will complete tasks that otherwise require the Board to hire additional staff.

The Committee to Form was initially contacted because of the desire of the Pinecrest Academy network to expand into the state of Idaho. The PAI Board has not entered into any contractual agreement with an Educational Service Provider, and the Committee to Form will continue to do its due diligence in researching services and pricing of other management companies to ensure that Academica is the best fit for the school. All Pinecrest Academy schools in Nevada and Florida contract with Academica as their Education Service Provider so it was a natural collaboration to begin this journey.

Academica is one of the nation's longest-serving and most successful charter school service and support organizations. Its mission is to facilitate each governing board's vision by handling the 'business' of the school, allowing the school to stay student-focused. Academica was founded in 1999 on the principle that each school is a unique educational environment led by an independent governing board. Academica works to help its clients achieve their educational and organizational goals. Academica's clients maintain complete control over their schools' academic programs, staffing needs, management, and curricula. Pinecrest Academy of Idaho will benefit from not only the Pinecrest Academy network of schools in Nevada and Florida, but also an existing portfolio of over 150 Academica partner schools.

Primarily Academica staff from Idaho and Nevada will assist Pinecrest Academy of Idaho in providing services to the school. All Academica schools follow industry best practices in regards to financial policies and procedures in addition to passing annual financial audits. Contact information for the Chief Operating Officer of Academica Nevada is as follows:

Ryan Reeves, Chief Operating Officer
Academica Nevada
6630 Surrey Street
Las Vegas, NV 89119

Academica Nevada's portfolio includes 38 schools that received star ratings in August 2018 (each elementary, middle, and high received their own star rating even if they reside on the same campus). Of the 38 schools, 24 earned four and five star ratings and 9 received three-star rating.

Role of Service Provider

The role of the service provider, Academica, is to serve at the will and guidance of the Board. Academica will be expected to carry out the defined responsibilities found in their contract in a manner that is consistent and assists the board to meet its vision and mission. Academica's services will include, but are not limited to, the following:

- At the Board's direction, prepare agendas and post notices of all board meetings;
- Assist the Board in locating and securing a school facility;
- Maintain the financial books of the school;
- Assist the Board in creating budgets and financial forecasts;
- Assist the Board in preparing applications for grant funds;
- Assist with school programs (i.e. National School Lunch Program);
- Assist with systems development;
- Assist with procurement of furniture, curriculum, and technology;
- Monitor and assure Compliance with all state reports;
- Assist the Board in identifying and retaining an employee leasing company;
- Assist with student and teacher recruitment (advertising, job fairs);
- Provide human resources related services such as dispute resolution and contract preparation and review; and,
- Assist the Board in renewing the School's charter.

As part of the commitment and relationship between PAI and Academica, it is understood and agreed that Academica will NOT do the following:

- Employ the School Administrator or any other licensed personnel;
- Draw orders for the payment of money, as that responsibility is limited strictly to the school's board and principal;
- Use fees paid by PAI to subsidize schools located outside of Idaho; and,
- Permit the school's lease and management contract to be conditioned one upon the other.

The payroll and employee leasing company is a third party vendor that will be providing a service to the school outside of the proposed Educational Service Provider. That contract agreement is approved by the Board of Directors, and the payroll processing fee is accounted for in the school's budget. If Academica has any affiliation with recommended vendors, this will be disclosed to the Board during an Open Meeting prior to entering into any agreements. If the PAI Board does not approve of a vendor recommended by the Educational Service Provider, there is no impact to the contract with Academica.

As outlined in the Education Service Provider Contract (*Appendix E*), all reimbursement of costs incurred by Academica on behalf of the school must be preapproved by the Board of Directors. The limit on these reimbursements is attributed to the expenses within the school's budget.

Evaluation of the ESP

The Governing Board and the school administration will have an opportunity to provide feedback to Academica a minimum of three times per year through the completion of a Service Evaluation. At the outset of a school year, the Board will establish goals with Academica and will evaluate them twice during the year (a mid- and end-of year evaluation). The Service Evaluation includes a rubric for each department/service within the Academica organization. Those departments include:

- Board Management
- Facilities
- Finance (Accounting, Accounts Payable, Budget, Payroll)
- Legal Services
- Marketing
- National School Lunch Program
- Procurement
- Registration
- School Resource Development
- State Reporting
- Teacher Recruitment

In evaluating the service provider, the Board Members and principal will use the Service Provider Rubric provided in *Appendix E* that uses the following rating metrics:

Academica Service Provider Rubric			
Exemplary	**Solid**	**Approaching**	**Unsatisfactory**
The service provider exceeds expectations of the school organization by providing excellent level of service. Provider anticipates problems and responds immediately to urgent requests, working extraordinarily flexible hours to meet the school	The service provider consistently meets all performance expectations in timeliness, accuracy, responsiveness, efficiency, and integrity. In the rare instance of failing to meet expectations, the service provider acknowledges the deficiency and takes clear and decisive action to address it.	The service provider occasionally failed to meet the school organization's expectations or has made a material error but otherwise performed satisfactorily. In response to such failure, the service provider is slow to respond or challenges the facts rather than focusing on solving	The service provider consistently fails to meet the school organizations expectations, is inflexible when urgent requests are made, does not respond quickly to calls of emails, subverts the school's organization's mission by its actions and behaviors, and does not embody the

organization's needs.		the problem proactively.	values of the school organization.

Appendix E: Public Charter School Closure Protocol

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

CLOSURE PROTOCOL

August 2013

Background

This Closure Protocol is aligned to Idaho statute and rule and is designed to reflect best practices for managing the school closure process in an organized manner that protects the state, students and the community.

The Idaho Public Charter School Commission Closure Protocol is based on the Colorado Charter School Sample Closure Framework released in 2011 and publicly available at www.charterschoolquality.org. The Colorado Sample Closure Framework was created through the collaborative work of the Colorado Department of Education, the Colorado League of Charter Schools, and the Colorado Charter School Institute.

The Colorado Charter School Sample Closure Framework incorporated information from the following sources:

1. *Accountability in Action: A Comprehensive Guide to Charter School Closure*. Edited by Kim Wechtenhiser, Andrew Wade, and Margaret Lin. National Association of Charter School Authorizers (2010).
2. Colorado Charter School Institute Closure Project Plan (2010).
3. *Charter Renewal*. Charter Schools Institute, The State University of New York (SUNY).
4. *Pre-Opening Checklist and Closing Checklist*. Office of Education Innovation, Office of the Mayor, City of Indianapolis.
5. *2010-2011 Charter Renewal Guidelines*. District of Columbia Public Charter School Board.

During the revision process, the following additional sources were integrated into the Idaho Public Charter School Commission Closure Protocol:

6. *Navigating the Closure Process*. Matthew Shaw. Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011).

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Introduction

Charter school closures happen when a school's charter is revoked, non-renewed, or relinquished. A number of factors can lead to closure of the school, including poor academic performance, finances, governance, or safety issues. Regardless of the reasons for closure, the board of directors of the public charter school is responsible for managing the closure and dissolution process.[2] Cooperation between the public charter school board and administrator, authorizer, and other state entities can allow for the facilitation of a smooth process that "minimize[s] disruption for students while ensuring that public funds are used appropriately."[3]

The closure process should begin as soon as the authorizer or the charter school board takes initial action to close the school, regardless of whether an appeals process has been completed or the decision has been finalized. This allows the school and authorizer to discuss the potential closure, identify a tentative timeline for the final decision, and work together to establish a closure team and clear paths of communication with each other, stakeholders, and the community.

Whenever possible, the authorizer and public charter school should work together to ensure that the school is able to operate through the completion of the regularly-scheduled school year. Under most circumstances, this should allow adequate time to complete all closure tasks. More importantly, it minimizes instructional gaps for students. However, there are occasions when it is necessary for a school to close mid-year. In these cases, students' educational transitions should be the highest priority. The school, authorizer, and other state entities must also identify the appropriate closure team and work closely together to prioritize closure tasks and manage their completion in as organized and efficient manner as possible.

Though individual schools should develop closure plans that are tailored to their situation, resources, and needs, all schools should keep the following primary goals in mind:

1. Providing educational services in accordance with the charter and performance certificate until the end of the school year, or the agreed upon date when instruction will stop.
2. Reassigning students to schools that meet their educational needs.
3. Addressing the school's financial, legal and reporting obligations.

The closure process has many tasks, which are illustrated in the chart below. Based on the circumstances surrounding the closure, not all tasks in this protocol may apply. When the charter school, authorizer, and other state entities meet at the outset of the closure process, they should refer to the Closure Protocol and identify which tasks will be required or necessary. During this meeting, responsible parties and completion dates should be agreed upon to ensure a transparent and smooth closure. The template that follows includes the basic tasks that will usually need to be addressed to close a school; the format allows for the insertion of responsible parties and task deadlines.

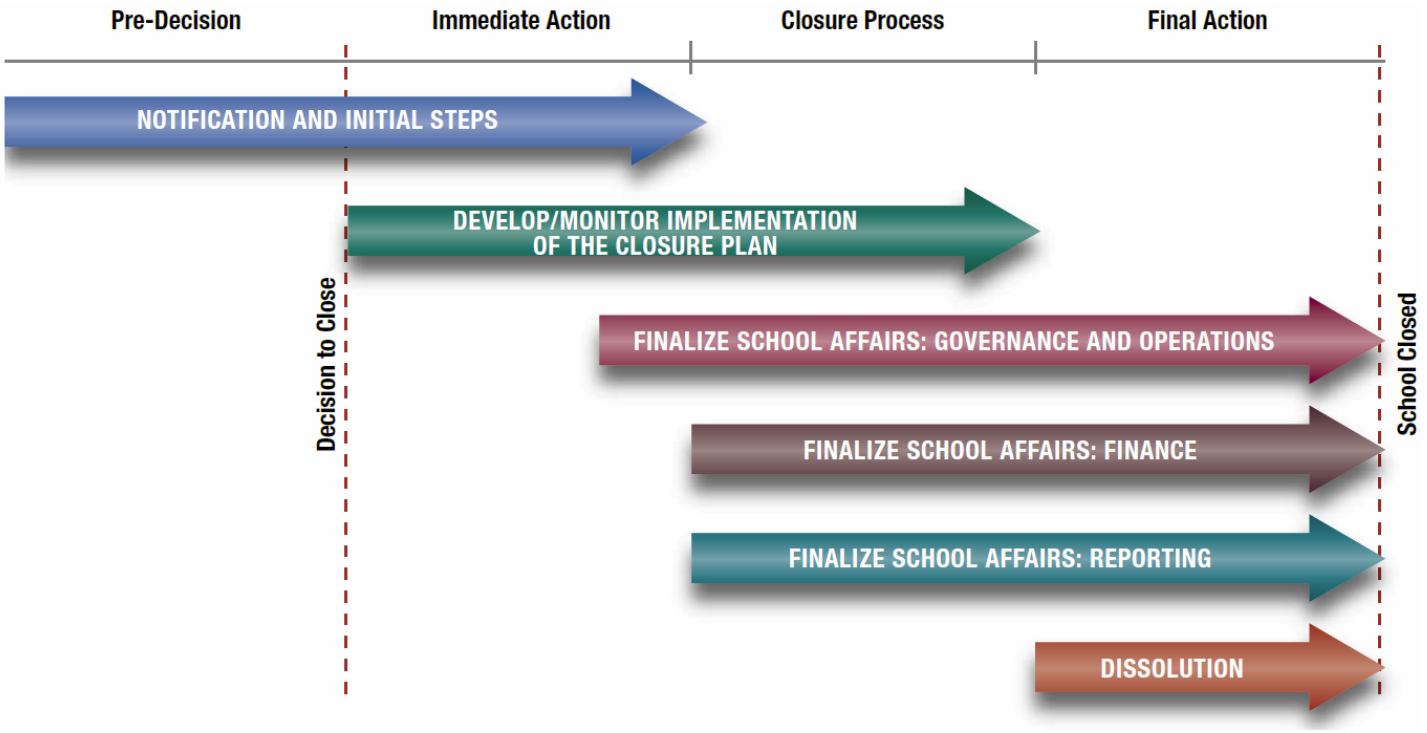
Endnotes

[1] Peyser, J. and Marino, M. "Why Good Authorizers Should Close Bad Schools." Accountability in Action: A Comprehensive Guide to Charter School Closure. National Association of Charter School Authorizers (2010). Pages 6 and 9.

[2] I.C. § 33-5212

[3] Shaw, M. "Navigating the Closure Process." Authorizing Matters Issue Brief, May 2011. National Association of Charter School Authorizers (2011). Pages 2-3.

A Conceptual Timeline for Closure



Notification and Initial Steps

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Meet with PCSC and SDE staff Within 3 business days of the authorizer's or school's initial / intended closure decision, the charter school administrator and a representative of the school's board will meet (in-person or via telephone or web conference) with staff representatives of the PCSC and SDE to: **1.** Review the remaining process for finalizing the closure decision as applicable **2.** Review the Closure Protocol and tasks and clarify critical deadlines **3.** Identify points of contact for media or community questions **4.** Draft communication to staff, families, and affected districts	School, PCSC, SDE			
Notify Parents / Guardians of Potential Closure **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to enrolled families. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Assurance that instruction will continue through the end of the school year or an estimation of when instruction will cease. • Assurance that after a final decision is reached, parents/students will be notified and assisted in the reassignment process. • Public Charter School Closure FAQ. • Contact information for parents/guardians with questions.	School, PCSC			
Notify School Districts Materially Impacted **1.** Within one week of the authorizer's or school's initial / intended closure decision, the charter school will send letters to districts materially impacted by the closure decision. Notification should include: • The reasons for closure. • If applicable, an explanation of the appeals process and likely timeline for a final decision. • Copy of the letter sent to parents. • Public Charter School Closure FAQ. • Contact information for questions.	School, PCSC			
Meet with Charter School Faculty and Staff Administrator and charter board chair meet with the faculty and staff to: **1.** Discuss reasons for closure, status of appeals process (if applicable), and likely timeline for a final decision. **2.** Emphasize importance of maintaining continuity of instruction through the end of the school year. **3.** Emphasize need to limit expenditures to necessities. **4.** Discuss plans for helping students find new schools and need for teachers and staff to have organized student files prepared for transfer. **5.** Identify date when last salary checks will be issued, when benefits terminate, and anticipated last day of work. **6.** Describe assistance, if any, that will be provided to faculty and staff to find new positions.	School			
Review and Report on Finances **1.** Review budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable. Communicate with the PCSC and SDE regarding financial status and next steps. **2.** Limit expenditures to only those in the approved budget and delay approving expenditures that might no longer be necessary until a revised budget is approved. **3.** Communicate with the SDE regarding whether there are any anticipated changes to remaining disbursements from the state.	School, PCSC, SDE			

Send Additional and Final Notifications **1.** Notify parents and affected school districts in writing after key events (e.g., denial of an appeal) and when the closure decision is final. **2.** The letters notifying staff, parents, and other districts of the final closure decision should include: • The last day of instruction. • Any end-of-the-year activities that are planned to make the transition easier for parents and students. • Assistance that will be provided to families in identifying new schools. This may include a list of school options; application deadlines or open house dates for traditional public, public charter, or private schools; or individual meetings with families. • Basic information about the process for access and transfer of student and personnel records.	School, PCSC			

Develop/Monitor Implementation of the Closure Plan

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Establish Transition Team, Develop Closure Plan, and Assign Roles **1.** Contact appropriate entities to establish a transition team, including: • A member of the PCSC staff • A member of the SDE staff • Charter school board chair • Lead administrator from the charter school • Lead finance person from the charter school • Additional members as deemed appropriate **2.** Develop plan, review roles of primary entities, identify individuals responsible for closure tasks, and exchange contact information.	School, PCSC, SDE			
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 and transfer of student records. **2.** Identification of long-term storage location of student and personnel records; plan for access and communication to parents regarding access. **3.** Notification to entities doing business with the school. **4.** The status of the school's finances, including outstanding expenses and payment of creditors and contractors. **5.** Sale, dissolution, or return of assets. **6.** Submission of all required reports and data to the authorizer and/or state.	School			
Submit Final Closure Report Submit the completed closure Protocol document and appropriate final closure documents to the PCSC (see the Reporting section for more details).	School			

Finalize School Affairs: Governance and Operations

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
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.	School			
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, 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.	School			
Notify Commercial Lenders / Bond Holders (if applicable) If the school has existing loans - Within 10 days after the final decision to close the charter school (after appeals process is complete), notify banks, bond holders, etc., of the school's closure and projected dates for the school's last payment towards its debt and if/when default will occur.	School			
Terminate EMO /CMO Agreement (if applicable) Review the management agreement and take steps needed to terminate the agreement at the end of the school year or prior to the intended closure date. **1.** The management company should be asked for a final invoice and accounting, including an accounting of any retained school funds and the status of grant funds. **2.** The school and the management company should agree upon how the company will continue to provide educational services until the last day of instruction. The school and the management company agree when other services including business services will end.	School			
Notify Contractors and Terminate Contracts **1.** Notify all contractors, including food service and transportation, 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.	School			
Notify Employees and Benefit Providers **1.** Whenever possible, provide employees with formal, written notification 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. WARN and COBRA) and eligibility for unemployment insurance pursuant to federal or state law or regulations of the Idaho Department of Labor. **2.** Notify benefit providers of pending termination of all employees, to include: • Medical, dental, vision plans. • Life insurance. • PERSI, 403(b), or other retirement plans **3.** Consult legal counsel as specific rules and regulations may apply to such programs.	School			

Finalize School Affairs: Governance and Operations (continued)

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain and Organize Records **1.** Maintain all corporate records related to: • Loans, bonds, mortgages and other financing. • Contracts. • Leases. • Assets and their sale, redistribution, etc. • Grants -- records relating to federal grants must be kept in accordance with 34 CFR 80.42. • Governance (minutes, bylaws, policies). • Accounting/audit, taxes and tax status, etc. • Employees (background checks, personnel files). • Employee benefit programs and benefits. • Any other items listed in the closure plan. **2.** Determine where records will be stored after dissolution.	School			
Transfer Student Records and Testing Material **1.** Ensure that all student records are organized and complete **2.** Within 10 days of receiving a records request, send student records, including final grades and evaluations, to the students' parent or new district and/or school, including: • Individual Education Programs (IEPs) and all records regarding special education and supplemental services. • Student health / immunization records. • Attendance record. • Any testing materials required to be maintained by the school. • Student transcripts and report cards. • All other student records. **3.** Document the transfer of records to include: • Date of transfer (for each individual student file transferred). • Signature and printed name of the charter school representative releasing the records. • Name and contact information of the receiver's representative. • The total number and percentage of general and special education records transferred.	School			
Inventory Assets and Prepare Federal Items for Pick-up **1.** Inventory school assets, and identify items: • Loaned from other entities. • Encumbered by the terms of a contingent gift, grant or donation, or a security interest. • Belonging to the EMO/CMO, if applicable, or other contractors. • Purchased with federal grants or funds (i.e. Charter Start grant) ➢ Items purchased with federal funds should be listed on the Federal Items Inventory spreadsheet provided by the PCSC. The list should be very detailed and complete, and items should not be sold or re-distributed. **2.** Return assets not belonging to school where appropriate documentation exists. Keep records of assets returned. **3.** Organize and pack items purchased with federal funds and arrange for PCSC walk-through and pick-up. ➢ Boxes should be packed, closed, taped, and *clearly* labeled with name(s) and/or number(s) corresponding to the inventory. ➢ PCSC walk-though must be scheduled in advance and must be at least 2 days prior to the scheduled move day. ➢ At the time of the walk-through, all federal items must be prepared and distinctly separate from other school assets. If the school's items are not adequately prepared for moving, the PCSC will delay the date for pick-up of federal items.	School, PCSC			

Finalize School Affairs: Finance

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Maintain IRS 501(c)(3) Status Maintain IRS 501(c)(3) status until final dissolution. Notify IRS regarding any address change(s) and file required tax returns and reports.	School			
Notify Funding Sources / Charitable Partners Notify all funding sources, including charitable partners of school closure. Notify state and federal agencies overseeing grants / programs of school closure.	School			
Review and Revise School Budget 1. Review the school's budget and overall financial condition. 2. Make revisions, taking closure expenses into account closure while prioritizing continuity of instruction. Submit budget to PCSC and SDE. 3. Identify acceptable use of reserve funds.	School, PCSC, SDE			
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. Note that the creditor list is not the same as the contractor list (above), but should include any contractors with whom the school owes money (based on a contract or invoice). 1. Creditors include lenders, mortgage holders, bond holders, equipment suppliers, service providers and secured and unsecured creditors. 2. 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.	School			
Notify Debtors and Process Payments Contact debtors to request payment. Process and document received payments.	School			
Determine PERSI Obligations Contact PERSI to determine remaining liabilities for employee retirement program.	School			
Notify and Pay Creditors 1. Notify all creditors of the school's closure and request final invoices. 2. Sell appropriate assets. 3. Prioritize and pay creditors in accordance with I.C. § 33-5212(2). Document payments made.	School			
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.	School			
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.	School, SDE, Fed			
Prepare Final Financial Statement Retain an independent accountant to prepare a final statement of the status of all contracts and 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.	School			
Complete Final Financial Audit Complete a financial audit of the school in accordance with statute by a date to be determined by the authorizer. Submit final audit to the PCSC and SDE.	School, PCSC, SDE			
Reconcile with State Reconcile state billings and payments. Reimbursement of funds previously disbursed to the school may be required.	School, SDE			

Finalize School Affairs: Reporting

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Prepare and Submit End-of-Year Reports **1.** Communicate with the PCSC regarding necessary end-year or annual data or reporting that needs to be submitted and identify deadlines. **2.** Prepare and submit annual reports to the authorizer.	School, PCSC			
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.	School			
Prepare and Submit Final ISEE Report Within 10 days of final closure, submit a final ISEE report to the SDE.	School, SDE			
Prepare and Submit Final Budget and Financial Reporting Within 120 days of final closure, submit a final budget and financial reporting, including final financial audit, to the SDE.	School, SDE			
Prepare and Submit All Other Required State and Federal Reports **1.** Communicate with the SDE and the federal government to identify any outstanding or final reports required for federal, state, or special programs (special education, Title I, etc.) and confirm deadlines. **2.** Prepare and submit reports to the SDE and/or federal government.	School, SDE			
Prepare and Submit Final Closure Report to the PCSC Submit the completed closure Protocol document and a narrative and/or attachments that outline the following: **1.** The name and contact information of the individual(s) with whom the PCSC can follow-up after closure if there are questions or issues to be addressed **2.** The school's final financial status, including the final independent audit **3.** The status of the transfer and storage of student records, including: • The school's total enrollment at the start of the final semester • The number and percentage of student records that have been transferred prior to closure • The plan for storage and access to student records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of public communication to parents regarding how to access student records after closure **4.** The status of the transfer and storage of personnel records, including: • The school's total number of staff at the beginning of the final semester • The number and percentage of personnel records that have been distributed to staff and/or new employers • If necessary, the plan for storage and access to personnel records after closure, including the signature of the person / entity that has agreed to be responsible for transferring records after closure • A copy of communication to staff regarding how to access personnel records after closure **5.** Additional documentation (inventories, operational info, etc.) may be included with the report	School, PCSC			

Dissolution

DESCRIPTION OF REQUIRED ACTIONS	ENTITIES INVOLVED	INDIVIDUALS RESPONSIBLE	DEADLINE	STATUS
Dissolve the Charter School (I.C. § 30-3-110) **1.** Give appropriate notice of the meeting per Open Meeting law and statute, including the intention to vote on the dissolution of the corporation. **2.** The charter school board adopts a plan of dissolution indicating to whom the assets of the non-profit corporation will be distributed after all creditors have been paid. (I.C. § 33-5206(9)) **3.** Unless otherwise provided in the bylaws, the board of directors votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution. (I.C. § 30-3-112)	School			
Notify the Secretary of State (I.C. § 30-3-112) **1.** After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth: • The name of the non-profit corporation. • The date dissolution was authorized. • A statement that dissolution was approved by sufficient vote of the board. • If approval of members was not required (commonly true for public charter schools), a statement to that effect and a statement that dissolution was approved by a sufficient vote of the board of directors or incorporators • Such additional information as the Secretary of State determines is necessary or appropriate.	School			
Notify Known Claimants (I.C. § 30-3-114) Give written notice of the dissolution to known claimants after the effective date of the dissolution. Claimants have 120 days from the effective date of the written notice to submit a claim.	School			
End Corporate Existence (I.C. § 30-3-113) 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.** Preserving and protecting its assets and minimizing its liabilities. **2.** Discharging or making provision for discharging its liabilities. **3.** Disposing of its properties that will not be distributed in kind. **4.** Returning, transferring or conveying assets held by the corporation upon a condition requiring return, transfer or conveyance, which condition occurs by reason of dissolution, in accordance with such condition. **5.** Transferring, subject to any contractual or legal requirements, its assets as provided in or authorized by its articles of incorporation or bylaws. **6.** Doing every other act necessary to wind up and liquidate its assets and affairs.	School			
Notify IRS Notify the IRS of dissolution of the education corporation and its 501(c)(3) status and furnish a copy to the authorizer.	School			

"If charter schools are to have any hope of transforming public education, they cannot settle for simply being pretty good or just above average – especially when that average is well below what students need to succeed in the world. From this perspective, charter schools need to be about excellence. Specifically, they need to prove that excellence is possible and achievable at scale and under difficult circumstances, even with students whom others may have given up on."

"All of those who embark on this perilous journey of hope deserve our deepest gratitude and respect for embracing this challenge with courage, persistence and good faith. But these virtues alone are not enough. Charter schools are not supposed to rest on good intentions and earnest effort; they are supposed to achieve meaningful results demonstrated by a sound body of evidence over the charter term. Charter schools that cannot deliver on that promise, either to their students or the broader public, need to be closed. This is the unpleasant, but imperative responsibility of authorizers."

-- James A. Peyser and Maura Marino. "Why Good Authorizers Should Close Bad Schools."[1]

SUBJECT

Elevate Academy Proposed Charter Amendment

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(8)
IDAPA 08.02.04.203

BACKGROUND

Elevate Academy is an alternative education campus focused on career technical education. The school serves approximately 285 students in grades 6-12 and is located in Caldwell. The school is approved to serve 487 students at capacity.

Elevate opened its doors in 2019, and is currently in its first year of operation.

DISCUSSION

Elevate Academy is requesting to amend the enrollment growth plan currently included in the school's charter and included in the performance certificate as Appendix D. While it is uncommon for school's to adjust enrollment before any performance outcomes can be measured, Elevate's student body faces unique challenges. The school has provided a description of the amendment request explaining the reasons for their request.

Elevate Academy is making two requests. The first is to reduce the number of students enrolled in grades 9-11, increase the number of students enrolled in grade 6, and grow the school's overall enrollment toward capacity more quickly than originally planned. No changes are proposed to enrollment grades 7, 8, and 12. The school proposes to adjust their maximum enrollment to 488, as this minor change will ensure the school's ability to maintain their CTE programs holistically. Charts are included in these materials for comparison.

The second request is to allow the school to hold 3 seats open in each grade level for the purpose of providing continuous enrollment in the school for students who are unenrolled temporarily due to a juvenile detention or Idaho Youth Challenge Academy situation.

IMPACT

If the PCSC approves the proposed amendments, relevant modifications to the school's charter and performance certificate will be adopted accordingly, and Elevate Academy will immediately begin operating under the amended charter and performance certificate.

If the PCSC denies the amendment, Elevate Academy could appeal this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends the PCSC approve the proposed amendments to Elevate Academy's performance certificate including the proposed adjustment in allowable enrollment by grade level and year of operation as presented in the amendment request submitted by Elevate Academy, and the ability to hold 3 seats open in each grade level for the purpose

of accommodating continuous enrollment in the school for students who are unenrolled temporarily due to a juvenile detention or Idaho Youth Challenge Academy situation.

COMMISSION ACTION

A motion to approve the proposed charter amendments including:

- The proposed adjustment in allowable enrollment by grade level and year of operation as presented in the amendment request submitted by Elevate Academy,

  and

- The ability to hold 3 seats open per grade level for the purpose of accommodating continuous enrollment in the school for students who are unenrolled temporarily due to a juvenile detention or Idaho Youth Challenge Academy situation.

OR

A motion to deny the proposed charter amendments as submitted by Elevate Academy on the following grounds: _____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Elevate Academy Amendment Request Cover Letter

Elevate is requesting both an amendment for the enrollment table, as well as flexibility when applying the table to real world scenario's at Elevate. After our charter was approved and before the school opened, we amended our enrollment table to reduce our sixth grade and expand our high school. The assumption made at that time was that parents would be reluctant to put a sixth grade student into an environment where students were labeled 'at risk'. Because of this assumption, Elevate reduced the sixth grade to one classroom and expanded the high school classes. Although this was done with the best of intentions, the move created an imbalance at Elevate, and we believe with a few tweaks we can better serve students, helps more students from a younger age, and have a stronger capacity for our high school students to be successful.

We propose to add an additional classroom to our sixth grade. This would increase enrollment for 22-44 per year. Currently we have over 100 students on the waiting list for sixth grade. The demand is clearly there, and the programming for the life of the student will be more impactful by making this adjustment. Second, our secondary class sizes are too large based on the secondary schema we proposed for opening. By reducing our high school classes by 10 students in each grade level, this will provide a better balance for the teachers so they are better able to serve their needs.

Additionally, we would like to request flexibility within the enrollment growth table to allow for up to 3 seats to be held open in each grade level to accommodate specific circumstances. For example: A student that is admitted to the local juvenile detention center is automatically enrolled in the Pat Anderson School, overseen by the Caldwell School District. This transfer requires Elevate to drop the student from our enrollment. Once that student is dropped, we enroll the next student on our waiting list. Often times the student is only in the detention center for a few days, then they are released. If we are full, we are not allowed to let that student re-enroll at Elevate, they must go back to their 'home school'.

At this point a student has gone to three schools within a week, and they don't get to return to where they on track, and they are often starting new, mid semester at another school. Nothing in this scenario aligns with the student being successful in the future, and only father propels a student being behind. Elevate was designed to do exactly the opposite for students that are already disenfranchised.

A second scenario we face is students that choose to attend the Idaho Youth Challenge Academy. Students must leave Elevate for 5 months to complete this program. If a student makes this choice, they are bettering their chances of being more successful in the future. We would like to request that when a student returns from this program they are allowed to enroll at Elevate, even if it put's us over the enrollment table agreement.

Enrollment Tables

Currently Approved Enrollment by Year

	Year 1 2019-20	Year 2 2020-21	Year 3 2021-22
6th	22	22	22
7th	66	66	66
8th	66	66	66
9th	88	88	84
10th	88	88	87
11th	x	88	87
12th	x		75
Total	330	418	487

Proposed Enrollment by Year

	Year 1 2019-20	Year 2 2020-21	Year 3 2021-22
6th	22	44	44
7th	66	66	66
8th	66	66	66
9th	88	78	78
10th	88	78	78
11th	x	78	78
12th	x		78
Total	330	410	488

February 13, 2020

SUBJECT

Consideration of Performance Certificate Negotiation

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(8)
IDAPA 08.02.04.302

BACKGROUND

Heritage Academy submitted a petition to revise its performance certificate on January 8th. Pursuant to Idaho Code §33-5206(8), the authorizer must issue a decision to accept or reject only the proposed changes within 75 days of receipt.

Heritage Academy is a K-8 school located in Jerome. The school offers a model focused on school-wide enrichment and had a full-term average daily attendance of 172 students in FY19. Heritage Academy's performance certificate was conditionally renewed in 2017 with two conditions (regarding academic proficiency and growth on the ISAT ELA and Math exams) to be met by June 30, 2020.

In the spring of 2019 the relationship between Heritage Academy and the PCSC was negatively impacted by comments made by PCSC staff and commissioners during an executive session.

Indirectly related, but of note, the PCSC Renewal Committee is currently reviewing the academic section of the PCSC Performance Framework and is considering whether revisions to the currently adopted calculations are necessary.

DISCUSSION

Heritage Academy will give a brief introduction of their school and their proposal. Meeting materials include a copy of the school's performance certificate with the school's proposed edits embedded. The school has also provided additional academic data for the PCSC's review.

PCSC staff reviewed the proposed certificate against the existing certificate and has provided a summary of the requests. Statute does not provide a mechanism by which the PCSC may approve several of the requests made. The provided summary indicates whether a particular request may or may not be considered for approval under the current law.

IMPACT

If the PCSC approves the proposed performance certificate revisions, Heritage Academy will immediately begin operating under the amended performance certificate.

If the PCSC denies the amendment, Heritage Academy could appeal this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends the PCSC approve the following:

- the changes to the school's Mission, Vision, and Key design elements as presented in the proposed performance certificate;

- the proposed reduction of the school's maximum enrollment from 450 students to 207 students with the per-grade enrollments as presented in the proposed performance certificate;

- the proposed adjustments to the school's primary attendance area as presented in the proposed performance certificate;

  and

- the proposed submission of the school's annual budget in the same format as is submitted to the SDE.

All other proposed changes may be discussed and considered by the PCSC.

COMMISSION ACTION

A motion to approve:

- the changes to the school's Mission, Vision, and Key design elements as presented in sections 3A and 3B of the proposed performance certificate;

- the proposed reduction of the school's maximum enrollment from 450 students to 207 students with the per-grade enrollments as presented in section 5B of the proposed performance certificate;

- the proposed adjustments to the school's primary attendance area as presented in section 5E of the proposed performance certificate;

  and

- the proposed submission of the school's annual budget in the same format as is submitted to the SDE as presented in section 6D of the proposed performance certificate.

OR

A motion to deny all proposed performance certificate revisions as submitted by Heritage Academy on the following grounds: _____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Heritage Academy
500 S. Lincoln Ave.
Jerome, ID 83338
(208)595-1617
www.heritageacademyid.org

January 21, 2020

Idaho Public Charter School Commission
Attn: Alan Reed, Chairman
Borah Building
304 N 8th Street Room 242
Boise, ID 83702
Tel: 208-332-1561
Fax: 208-334-2632
Email: pcsc@osbe.idaho.gov

Dear Chairman Reed and Interim Commission Director Thompson,

Enclosed is both the response to the Heritage Academy Draft Annual Performance Report and our request for amendments to our charter and our current performance certificate. It has become increasingly clear that our current performance certificate and renewal conditions are neither adequate nor appropriate to serve as an agreement between the Commission and Heritage Academy. Due to the extreme nature of the events that occurred during 2019, and subsequent impact on our school, we are requesting that our charter amendments be approved immediately. We are also requesting that our performance certificate and conditions be revised and approved for two subsequent performance periods: July 1, 2020 – June 30, 2025 and July 1, 2025 – June 30, 2030.

We understand that this request is unusual. The circumstances that led to the request are unusual and are the result of unprofessional behavior on the part of your staff members. These circumstances have left our board hesitant to work with the Commission and our level of trust in receiving fair treatment low. Our board believes that creating a new performance certificate, with an extended period of renewal, is the most appropriate way to repair the significant damage done to our school by the Commission.

Heritage Academy believes that the following items require an unusual approach to accomplish reparation of the damage inflicted upon our school by the illegal and irresponsible behavior of Commission staff members and commissioners.

- Illegal and unprofessional activity uncovered by the executive session recording (April 2019)
- Untrue statements made about Heritage Academy board members and administrators
- False data provided to commissioners
- Characterization of our school in a way that is demeaning and is based upon subjective, unfair and untrue comments
- Comments by a current commissioner and former renewal visit team member that violate the intent of Brown v. Board of Education and show an ongoing bias toward our school and our superintendent

Due to the extreme nature of the behavior exhibited by IPCSC staff members and commissioners, it is unlikely that our school can overcome the resulting damage in the next year, prior to the current renewal date. In a small community, with a mission to serve students and families with barriers to school success, the damage to our school's reputation, enrollment and revenue may take several years to overcome. While the Commission may think that a brief acknowledgement of the Open Meeting Law violation and training has corrected the problem, for our school, the damage is tremendous.

Again, we understand that the request for a new performance certificate, renewal conditions and an extended performance period is unusual. The damage done to our school is unusual and significant. We ask you to consider the following:

- All commissioners participated in the April illegal discussion. All were influenced by the information provided and the comments made about our school. In fact, none were true.
- As a result, ongoing trust and collaboration is a challenge. At this point, it is difficult for our board members and staff members to believe we will be treated fairly.
- All commissioners consider our school a "low performing" school and most may consider our school a problem due to the ongoing publicity surrounding the April meeting. This is unfair. Our school did not create the problem. The Commission staff members and commissioners created the problem by a combination of lack of understanding of data and growth, unprofessional behavior and ongoing unwillingness to obtain accurate information.
- Our last pre-renewal site visit report was filled with subjective, inaccurate information. In addition, our school board was advised to create two schools – one for kids with problems (disabilities, English learners, etc.) and one for the "stable" kids. This recommendation was made by a current commissioner and member of the renewal committee. Our site visit was conducted by a former Commission staff member and that specific commissioner. This leads our board to believe that the bias toward our school will continue.
- Our enrollment decreased as a direct result of the Commission recording and the comments made by commissioners and staff members. This led to a loss of over $300,000 of revenue, a reduction in force and potential changes in student demographic characteristics. These factors will affect our 2019-20 Annual Performance Report in a manner that would potentially make renewal unlikely and are a direct result of the actions of the Commission.
- Renewal Committee membership, activity and meetings seems to be designed to perpetuate the current system. That system puts our school at an extreme disadvantage.

Due to those concerns, we believe our request is reasonable. Creating new and unique performance certificates, and associated renewal conditions, that run through the upcoming ten years (July 1, 2020 – June 30, 2030) will give our school time to recover from the damage done by the Commission and continue the growth we have experienced prior to this unfortunate chapter in our school's history. Additionally, it will give our school and the Commission time to build a new and better relationship.

We appreciate your careful consideration of our Annual Performance Report Response, Charter Amendments and proposed performance certificate. We look forward to working with you to obtain approval and move forward in our efforts to serve students and families.

Sincerely,

Mr. Carroll Cone
Chairman, Board of Directors

Ms. Kris Gilgren
Chair, Charter Renewal Committee

Dr. Christine Ivie
Superintendent

CHARTER SCHOOL PERFORMANCE CERTIFICATE

LEA 479 Heritage Academy

July 1, 2020 – June 30, 2025

This performance certificate is executed on this 13th day of February, 2020, by and between the Idaho Public Charter School Commission (the "Authorizer"), and Heritage Academy, Inc. (the "School"), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Law, Idaho Code Section 33-5201 et seq, as amended (the "Charter Schools Law.")

RECITALS

WHEREAS, on August 5, 2010, the Authorizer approved a charter petition for the establishment of the School; and

WHEREAS, the School began operations in the year 2011; and

WHEREAS, the School's charter was renewed on February 7, 2017 for a five-year term of operations,

NOW THEREFORE in consideration of the foregoing recitals and mutual understandings, the Authorizer and the School agree as follows:

SECTION 1: AUTHORIZATION OF CHARTER SCHOOL

A. Continued Operation of School. Pursuant to the Charter Schools Law, the Authorizer hereby approves the continued operation of the School on the terms and conditions set forth in this Charter School Performance Certificate (the "Certificate"). The approved Charter is attached to this Certificate as Appendix C.

B. Term of Agreement. This Certificate is effective as of July 1, 2020, and shall continue through June 30, 2025, unless earlier terminated as provided herein.

SECTION 2: SCHOOL GOVERNANCE

A. Governing Board. The School shall be governed by a board (the "Charter Board") in a manner that is consistent with the terms of this Certificate so long as such provisions are in accordance with state, federal, and local law. The Charter Board shall have final authority and responsibility for the academic, financial, and organizational performance of the School. The Charter Board shall also have authority for and be responsible for policy and operational decisions of the School, although nothing herein shall prevent the Charter Board from delegating decision-making authority for policy and operational decisions to officers, employees and agents of the School, as well as third party management providers.

B. Articles of Incorporation and Bylaws. The articles of incorporation and bylaws of the entity holding the charter shall provide for governance of the operation of the School as a nonprofit corporation and public charter school and shall at all times be consistent with all applicable law and this Certificate. The articles of incorporation and bylaws are attached to this Certificate as Appendix D (the "Articles and Bylaws"). Any modification of the Articles and Bylaws must be submitted to the Authorizer within five (5) business days of approval by the Charter Board. C. Charter Board Composition. The composition of

the Charter Board shall at all times be determined by and consistent with the Articles and Bylaws and all applicable law and policy. The Charter Board shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five (5) business days of their taking effect.

SECTION 3: EDUCATIONAL PROGRAM

A. School Mission and Vision. The mission and vision of the School are as follows:

VISION

- Heritage Academy believes each student has gifts, talents and strengths.
- We embrace a diverse student body and commit to creating a nurturing and supportive school culture.
- Our school ensures that all students acquire the academic, interpersonal, critical thinking and problem-solving skills and mindsets to succeed in school, career and life.
- Our goal is to enable students to become responsible, respectful and caring members of society.

MISSION

Our school community brings together the resources necessary to help all students grow and succeed.

B. Grades Served. The School may serve students in Kindergarten through grade 8.

C. Design Elements. The School shall implement and maintain the following essential design elements of its educational program:

- Use the School Enrichment Model (SEM) to provide expanded educational opportunities for all students based on their strengths and interests in order to engage them in their learning, thereby raising expectations and achievement for all. The fundamental aspect of the SEM is Enrichment Clusters
  - Each student participates in at least one enrichment cluster per school year. Clusters last 6-12 weeks, and typically meet once per week.
  - Students work in small groups to produce products or services that solve real-world problems and benefit the students, their school, or the larger community.
- Strong Social Emotional Learning (SEL) program
  - Implementation of 7 Mindsets Program
  - Safe environment
    - Students are provided with a safe school facility.
    - Students have access to adults willing to listen and protect students' safety.
    - Students are provided with education and tools to encourage safe behavior among themselves.
    - A strong, anti-bullying policy will be enforced.
- Community School Approach to Meeting the Needs of Students and Families
  - Community partnerships developed to support students and families

- Social, emotional and academic needs of students and families are addressed as part of a comprehensive approach to helping students succeed in school and in life.

D. Standardized Testing. Students of the School shall be tested with the same standardized tests as other Idaho public school students.

E. Accreditation. The School shall be accredited as provided by rule of the state board of education.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

A. Oversight Allowing Autonomy. The Authorizer shall comply with the provisions of Charter School Law and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School. The Authorizer's Role will be to evaluate the School's outcomes according to this Certificate ~~and the Performance Framework~~ rather than to establish the process by which the School achieves the outcomes sought.

B. Charter School Performance Framework. The Charter School Performance Framework ("Performance Framework") ~~is attached and~~ will not be incorporated into this agreement until after June 30, 2025. The Performance Framework shall not be used to evaluate the School's academic, financial and operational performance, and shall not supersede and replace any and all assessment measures, educational goals and objectives, financial operations metrics, and operational performance metrics set forth in the Charter ~~and not explicitly incorporated into the Performance Framework~~. Specific terms, form and requirements of the Performance Framework, including any required indicators, measures, metrics, and targets, are determined by the Authorizer and shall not be binding on the School during the five years of this performance certificate.

C. Authorizer to Monitor School Performance. The Authorizer shall monitor and report on the School's progress in relation to the indicators, measures, metrics and targets set out in the Performance Framework. The School shall be subject to a formal review of its academic, mission-specific, operational, and financial performance at least annually. During the five years of this performance certificate, enrollment and revenue metrics will not negatively impact the overall scores for the financial and operational sections of the school's annual report due to the potential negative impact of the Authorizer's April 2019 meeting.

D. School Performance. The School shall work to achieve an accountability designation of Good Standing or Honors on each of the three sections of the Performance Framework. Heritage Academy shall be exempt from enrollment and finance measures for the five years of this certificate due to the impact of the April 2019 Authorizer meeting. In the event the School is a party to a third party management contract which includes a deficit protection clause, the School shall be exempt from some or all measures within the financial portion of the Performance Framework. In accordance with Charter School Law, the Authorizer shall renew any charter in which the public charter school met all of the terms of its performance certificate at the time of renewal.

E. Performance Framework As Basis For Renewal of Charter. The School's performance in relation to the indicators, measures, metrics and targets set forth in the Academic and Mission-Specific, Operational and Financial sections of the Performance Framework shall not serve as the basis upon which the Authorizer will decide whether to renew the School's Charter at the end of the Certificate

term (June 30, 2025). The certificate term (2020 – 2025) will serve as a reparation period for the School. The Authorizer acknowledges that unfair treatment of the School, by its authorizer, has negatively impacted all areas (academic, financial and operational) of the School's performance. The Authorizer therefore grants an extended performance certificate with exemption from use of the performance certificate for revocation or renewal purposes until the end of this certificate.

As part of the Performance Framework, the Authorizer agrees to consider mission-specific, rigorous, valid, and reliable indicators of the School's performance. These negotiated indicators will be included in the Mission-Specific portion of the Academic and Mission Specific section of the Performance Framework.

F. Authorizer's Right to Review. The School will be subject to review of its academics, operations and finances by the Authorizer, including related policies, documents and records, when the Authorizer deems such review necessary, but no more frequently than once per year. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.

G. Site Visits. In addition to the above procedures, the Charter School shall grant reasonable access to, and cooperate with, the Authorizer, its officers, employees and other agents, including allowing site visits by the Authorizer, its officers, employees, or other agents, for the purpose of allowing the Authorizer to fully evaluate the operations and performance of the School. The Authorizer may conduct a site visit at any time if the Authorizer has reasonable concern regarding the operations and performance of the School. The Authorizer will provide the School reasonable notice prior to its annual site visit to the School. The School shall have an opportunity to provide a written response to the site visit report no later than fourteen (14) days prior to the meeting at which the report is to be considered by the Authorizer. If no written response is provided, the School shall have the opportunity to respond orally to the site visit report at the meeting.

The Authorizer agrees that during this performance period (July 1, 2020 – June 30, 2025), all site visit reviews shall be conducted by a third party that is mutually agreed upon by the Authorizer and the Charter School. Third party reviewers shall hold current teaching and administrative certification through the Idaho Professional Standards Commission and a minimum of five years of service in public school districts with demographic characteristics of no more than 5% less than the Charter School in the following categories: Free and Reduced Lunch Percentage, Students with Disabilities, English Language Learners. Any cost incurred by the third party review will be the responsibility of the Authorizer and may be funded through Authorizer fees collected annually by the Authorizer.

H. Required Reports. The School shall prepare and submit reports regarding its governance, operations, and/or finances according to the established policies of and upon the request of the Authorizer. However, to the extent possible, the Authorizer shall not request reports from the School that are otherwise available through student information systems or other data sources reasonably available to the Authorizer.

SECTION 5: SCHOOL OPERATIONS

A. In General. The School and the Charter Board shall operate at all times in accordance with all federal and state laws, local ordinances, regulations and Authorizer policies applicable to charter schools.

B. Maximum Enrollment. The maximum number of students who may be enrolled in the school shall be 207 students. The maximum number of students who may be enrolled per class/grade level shall be as follows: 20 students per grade level in kindergarten, 1st and 2nd grade; 22 students in 3rd grade and 25 students in grades 4 through 8.

C. Enrollment Policy. The School shall make student recruitment, admissions, enrollment and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the charter school than there are spaces available, the charter school shall select students to attend using a random selection process that shall be publicly noticed and open to the public.

D. School Facilities. 500 S. Lincoln Ave, Jerome, Idaho, 83338. The School shall provide reasonable notification to the Authorizer of any change in the location of its facilities.

E. Attendance Area. The School's primary attendance area is as follows:

North Boundary: 900 North Road (Northern Jerome County Boundary)

East Boundary: 500 East Road

South Boundary: Golf Course Rd (700 South) (Southern Jerome County Boundary)

West Boundary: 500 West Road (Western Jerome County Boundary)

F. Staff. Instructional staff shall be certified teachers as provided by rule of the state board of education. All full-time staff members of the School will be covered by the public employee retirement system, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.

G. Alignment with All Applicable Law. The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

A. General. The School shall comply with all applicable financial and budget statutes, rules, regulations, and financial reporting requirements, as well as the requirements contained in the Performance Framework incorporated into this agreement as Appendix B.

B. Financial Controls. At all times, the Charter School shall maintain appropriate governance and managerial procedures and financial controls which procedures and controls shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them (2) a checking account; (3) adequate payroll procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants in accordance with applicable state and federal law.

C. Financial Audit. The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.

D. Annual Budgets. The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format and any other format required for submission to the Idaho Department of Education. ~~as may be reasonably requested by the Authorizer.~~

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

A. Termination by the School. Should the School choose to terminate its Charter before the expiration of the Certificate, it may do so upon written notice to the Authorizer. Any school terminating its charter shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

B. Nonrenewal. The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one (1) or more of the terms of its Certificate. Any school which is not renewed shall work with the Authorizer to ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

C. Revocation. The School's Charter may not be revoked by the Authorizer prior to the end of this performance period: June 30, 2025 except for substantial, material non-compliance to applicable state and federal law. If the School has failed to meet any of the specific, written renewal conditions attached as Appendix A, the Authorizer and the Charter School will develop a mutually agreed upon plan for necessary improvements by the dates specified. Revocation may not occur until the public charter school has been afforded a public hearing, unless the Authorizer determines that continued operation of the public charter school presents an imminent public safety issue. If the School's Charter is revoked, the School shall work with the Authorizer ensure a smooth and orderly closure and transition for students and parents, as guided by the public charter school closure protocol established by the Authorizer attached as Appendix E.

D. Dissolution. Upon termination of the Charter for any reason by the Charter Board, or upon nonrenewal or revocation, the Charter Board will supervise and have authority to conduct the winding up of the business and other affairs of the School; provided, however, that in doing so the Authorizer will not be responsible for and will not assume any liability incurred by the School. The Charter Board and School personnel shall cooperate fully with the winding up of the affairs of the School.

E. Disposition of School's Assets upon Termination or Dissolution. Upon termination of the Charter for any reason, any assets owned by the School shall be distributed in accordance with Charter Schools Law.

SECTION 8: MISCELLANEOUS

A. No Employee or Agency Relationship. None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, ownership, or employment between the Authorizer and the School.

B. Additional Services. Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.

C. No Third-Party Beneficiary. This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.

D. Amendment. This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and Heritage Academy (HA) have executed this

Performance Certificate to reflect minor charter amendments and to establish a mutually agreed upon performance certificate that allows the school to recover from the damage incurred as a result of the April 11, 2019 illegal executive session meeting of the Idaho Public Charter Commission.

IN WITNESS WHEREOF, the Aulhorizer and the School have executed this Performance Certificate to be effective: February 13, 2020

_____ _____

Chairperson, Idaho Public Charter School Commission Chairperson, Heritage Academy

The Amendment to HA's Performance Certificate is effective as of February 13, 2020.

1. By June 30, 2025, Heritage Academy and the Idaho Public Charter School Commission will develop mutually agreed upon performance measures to ensure students at the school continue to make growth toward proficiency. These measures will recognize the demographic characteristics of students enrolled at Heritage Academy and will incorporate reasonable growth goals for students with those specific characteristics.

IN WITNESS WHEREOF, the Aulhorizer and the School have executed this Performance Certificate to be effective: February 13, 2020

_____ _____

Chairperson, Idaho Public Charter School Commission Chairperson, Heritage Academy

Heritage Academy Data Comparisons and Documentation

The Idaho Public Charter School Commission (PCSC) and its staff criticized Heritage and said:

- Heritage students would be better off if they returned to the Jerome School District.
- All Jerome students (Heritage and JSD) would be much better off if they were bussed to Commission-favorite North Valley Academy, a charter school in Gooding.
- The Commissioners said that Heritage, Jerome School District and North Valley Charter School serve populations with the same demographic characteristics.
- They say that North Valley students grow while Heritage and Jerome School District students fail.

The data show that Heritage Academy is overcoming tremendous barriers and challenging demographic characteristics to produce growth!

Student Demographic Characteristics - <u>NOT THE SAME</u>

School	Students from Low Income Families	Students with Disabilities	Students Learning English	Non-White	At Risk (Homeless, Foster Care, etc.)
State of Idaho	45%	11%	7%	24.9%	5%
Heritage Academy	**96% Students from low income families**	**24% Students with Disabilities**	**19% Students Learning English**	**45% Non-White**	**5% At-Risk**
Jerome School District	64%	11%	22%	55%	5%
North Valley Academy	60%	13%	4%	24%	3%
Idaho ‘s “High Performing” Charters *	22%	4%	<1%	15%	<1%

***Top 10 charter schools based upon the IPCSC Academic framework measures**

Most Challenging Characteristics

School	Low Income	Students with Disabilities	English Learners	At Risk
School	Heritage Academy	Heritage Academy	Jefferson Elementary	Heritage, Jefferson & Horizon
Percent	96%	24%	43%	5%

Least Challenging Demographic Characteristics

School	Low Income	Students with Disabilities	English Learners	At Risk
School	North Valley Charter 60%	Jefferson Elementary <10%	North Valley Charter 4%	North Valley Charter 3%
Commission "Top Performers"	**Commission Top 10** **22%**	**Commission Top 10 Schools** **4%**	**Commission Top 10** **<1%**	**Commission Top 10 Schools** **<1%**

ACADEMIC DATA

Most Significant Growth

	2018 - 2019 ISAT MATH	2018-2019 ISAT ELA	Fall 2018 to Spring 2019 IRI
School	Heritage Academy & North Valley Charter	Heritage Academy	Heritage Academy
Percent Growth	Increase of 22%	Increase of 77%	Increase of 109%

Least Growth

	2018 - 2019 ISAT MATH	2018-2019 ISAT ELA	Fall 2018 to Spring 2019 IRI
School	Horizon Elementary	Jerome Middle School	North Valley Charter
Percent Growth	Decrease of 15%	Decrease of 12%	Increase of 9%

Fall 2019 IRI Proficiency - <u>NOT THE SAME</u>

- These data show two important things:
    1. Spring 2019 to Fall 2019 data show summer loss which may be regained over the school year.
    2. For Heritage Academy, 91% of first through third graders tested attended Heritage Academy during the 2018-19 school year. The increase in Fall 2018 to Fall 2019 proficiency shows the positive impact and growth due to good instruction provided by the school.

School	Fall Proficiency 2018 IRI	Spring Proficiency 2019 IRI	Fall 2018 to Spring 2019 Growth	Fall Proficiency 2019 IRI	Spring to Fall Loss	Fall 2018 to Fall 2019 Growth
State of Idaho	52.6%	70.4%	34% Increase	54.7%	22% Loss	4% Increase
Heritage Academy	**28.4%**	**59.3%**	**109% Increase In 1 year**	**42.4%**	**28% Summer Loss**	**49% Increase**
Jerome School District	41.9%	54%	29% Increase	36%	33% Loss	14% Decrease
North Valley Academy	50.6%	54.9%	9% Increase	39.7%	28% Loss	22% Decrease

Data Comparison Chart 2018-2019 ISAT and IRI

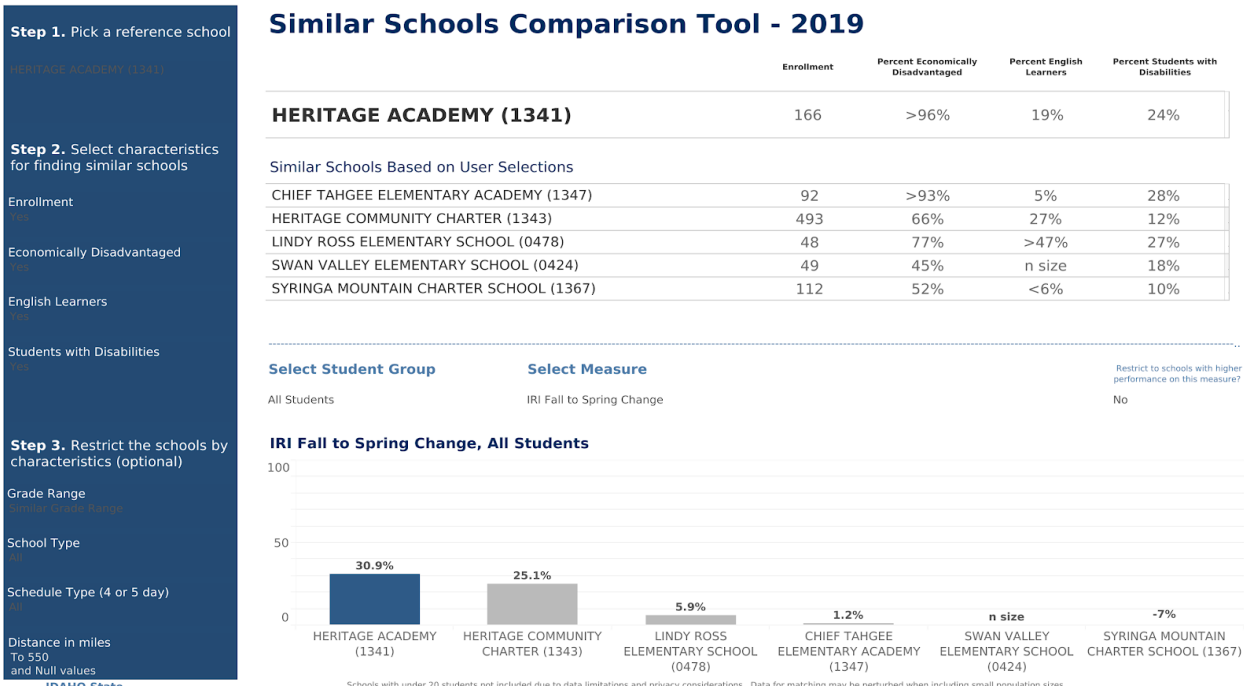
School	2018-19 Fall IRI	2018-19 Spring IRI	Raw change in %	Growth	Spring 2018 ISAT ELA	Spring 2019 ISAT ELA	Raw change in %	Growth	Spring 2018 ISAT Math	2019 ISAT Math	Raw change in %	Growth	Spring 2019 ISAT Science
State of Idaho	52.6%	70.4%	17.8%	34%	53.7%	55.6%	1.9%	4%	43.7%	45.2%	1.5%	3%	59.6%
Heritage Academy	28.4%	59.3%	30.9%	109%	16.5%	29.2%	12.7%	77%	12.5%	15.3%	2.8%	22%	32.5%
Jefferson Elementary	42%	46.7%	4.7%	11%	<25%	26%	1%	<4%	<30%	27%	--3%	--10%	NA
Horizon Elementary	42.3%	61.4%	19.1%	45%	39.5%	38.9%	--0.6%	--2%	44.4%	37.6%	--6.8%	--15%	NA
Jerome Middle School	NA	NA	NA	NA	43.4%	38.3%	--5.1%	--12%	29.1%	23.4%	--5.7%	--20%	39.1%
Jerome School District	41.9%	54%	12.1%	29%	40.5%	38.1%	--2.4%	--6%	28.8%	25.8%	--3%	--10%	47.9%
Gooding School District	48.5%	67%	18.5%	38%	37.1%	43.5%	6.4%	17%	29.2%	30.5%	1.3%	4%	54.2%
North Valley Academy	50.6%	54.9%	4.3%	9%	42.5%	52.9%	10.4%	25%	31%	38%	7%	22%	51.2%

SIMILAR SCHOOLS COMPARISONS

Comparisons made with similar schools - Idaho Report Card Data (SDE)

School	Economically Disadvantaged	English Learners	Students with Disabilities
Heritage Academy	96%	19%	24%
Chief Tahgee Charter	93%	5%	28%
Heritage Community Charter	66%	27%	12%
Linda Ross Elementary	77%	>47%	27%
Swan Valley Elementary	45%	N size	18%
Syringa Mountain School	52%	<6%	10%

Fall to Spring Reading Growth



Spring Reading Proficiency

Step 1. Pick a reference school

HERITAGE ACADEMY (1341)

Step 2. Select characteristics for finding similar schools

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the schools by characteristics (optional)

Grade Range
Similar Grade Range

School Type
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Schools Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
HERITAGE ACADEMY (1341)	166	>96%	19%	24%

Similar Schools Based on User Selections

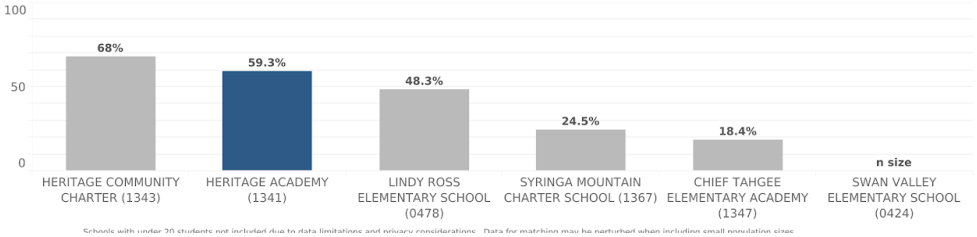
CHIEF TAHGEE ELEMENTARY ACADEMY (1347)	92	>93%	5%	28%
HERITAGE COMMUNITY CHARTER (1343)	493	66%	27%	12%
LINDY ROSS ELEMENTARY SCHOOL (0478)	48	77%	>47%	27%
SWAN VALLEY ELEMENTARY SCHOOL (0424)	49	45%	n size	18%
SYRINGA MOUNTAIN CHARTER SCHOOL (1367)	112	52%	<6%	10%

Select Student Group
All Students

Select Measure
IRI Spring Proficiency

Restrict to schools with higher performance on this measure?
No

IRI Spring Proficiency, All Students



Schools with under 20 students not included due to data limitations and privacy considerations. Data for matching may be perturbed when including small population sizes.

Math Growth (Spring 2018 to Spring 2019)

Step 1. Pick a reference school

HERITAGE ACADEMY (1341)

Step 2. Select characteristics for finding similar schools

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the schools by characteristics (optional)

Grade Range
Similar Grade Range

School Type
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Schools Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
HERITAGE ACADEMY (1341)	166	>96%	19%	24%

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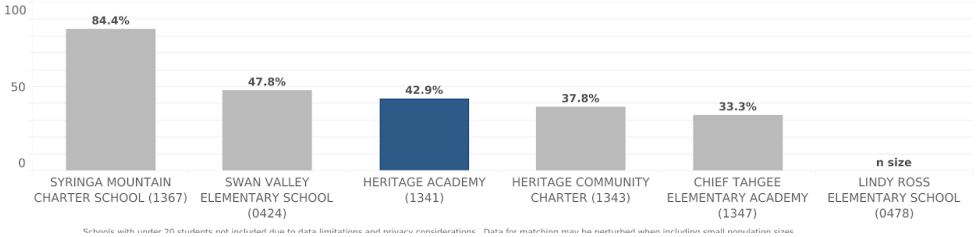
SWAN VALLEY ELEMENTARY SCHOOL (0424)	49	45%	n size	18%
SYRINGA MOUNTAIN CHARTER SCHOOL (1367)	112	52%	<6%	10%

Select Student Group
All Students

Select Measure
Math Growth

Restrict to schools with higher performance on this measure?
No

Math Growth, All Students



Schools with under 20 students not included due to data limitations and privacy considerations. Data for matching may be perturbed when including small population sizes.

ELA Growth (Spring 2018 - Spring 2019)

Step 1. Pick a reference school

HERITAGE ACADEMY (1341)

Step 2. Select characteristics for finding similar schools

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the schools by characteristics (optional)

Grade Range
Similar Grade Range

School Type
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Schools Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
HERITAGE ACADEMY (1341)	166	>96%	19%	24%

Similar Schools Based on User Selections

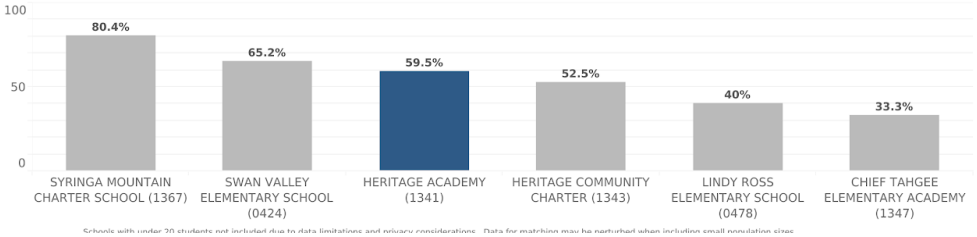
CHIEF TAHGEE ELEMENTARY ACADEMY (1347)	92	>93%	5%	28%
HERITAGE COMMUNITY CHARTER (1343)	493	66%	27%	12%
LINDY ROSS ELEMENTARY SCHOOL (0478)	48	77%	>47%	27%
SWAN VALLEY ELEMENTARY SCHOOL (0424)	49	45%	n size	18%
SYRINGA MOUNTAIN CHARTER SCHOOL (1367)	112	52%	<6%	10%

Select Student Group
All Students

Select Measure
ELA Growth

Restrict to schools with higher performance on this measure?
No

ELA Growth, All Students



Schools with under 20 students not included due to data limitations and privacy considerations. Data for matching may be perturbed when including small population sizes.

English Learner Growth Compared to a Full Dual Language Immersion Program

Step 1. Pick a reference school

HERITAGE ACADEMY (1341)

Step 2. Select characteristics for finding similar schools

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the schools by characteristics (optional)

Grade Range
Similar Grade Range

School Type
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Schools Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
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SYRINGA MOUNTAIN CHARTER SCHOOL (1367)	112	52%	<6%	10%

Select Student Group
All Students

Select Measure
English Learner Growth

Restrict to schools with higher performance on this measure?
No

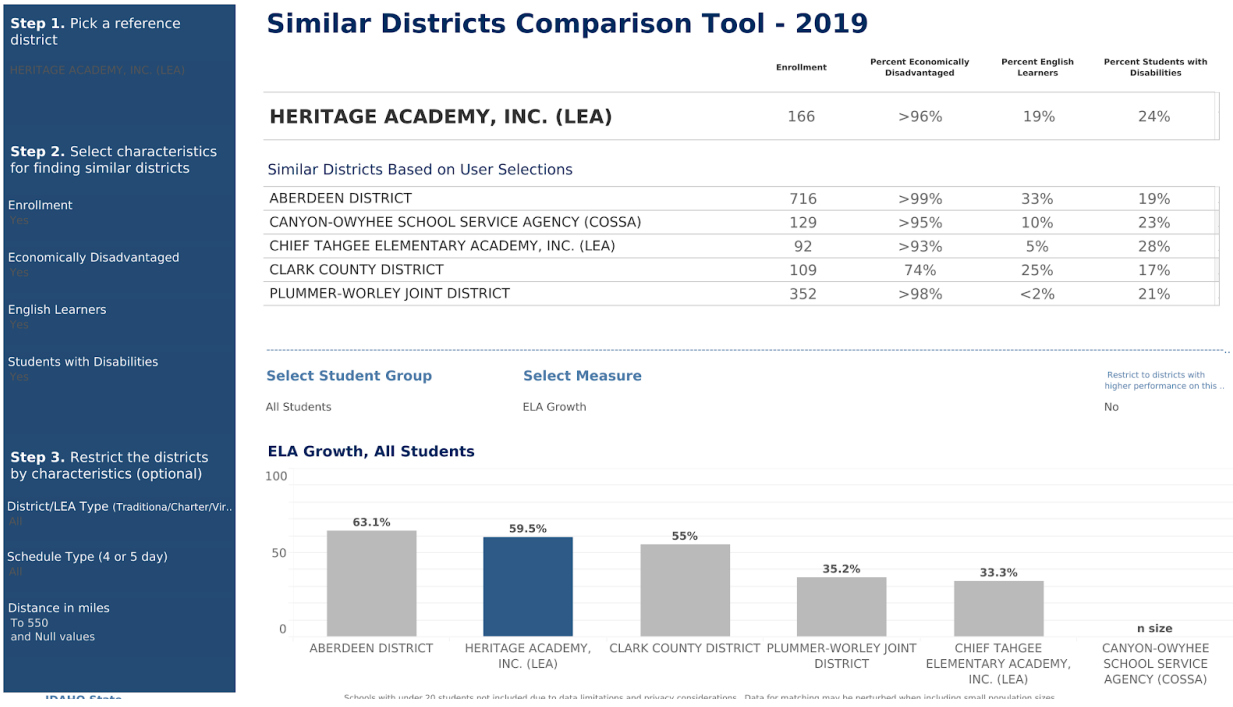
English Learner Growth, All Students

Schools with under 20 students not included due to data limitations and privacy considerations. Data for matching may be perturbed when including small population sizes.

SIMILAR DISTRICTS COMPARISON

Comparisons made with similar district - Idaho Report Card Data (SDE)

District	Economically Disadvantaged	English Learners	Students with Disabilities
Heritage Academy	96%	19%	24%
Aberdeen District	99%	33%	19%
COSSA	95%	10%	23%
Chief Tahgee Charter	93%	5%	28%
Clark County District	74%	25%	17%
Plummer-Worley District	>98%	<2%	21%



Math Growth (Spring 2018-Spring 2019)

Step 1. Pick a reference district

HERITAGE ACADEMY, INC. (LEA)

Step 2. Select characteristics for finding similar districts

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the districts by characteristics (optional)

District/LEA Type (Traditiona/Charter/Vir..
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Districts Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
HERITAGE ACADEMY, INC. (LEA)	166	>96%	19%	24%

Similar Districts Based on User Selections

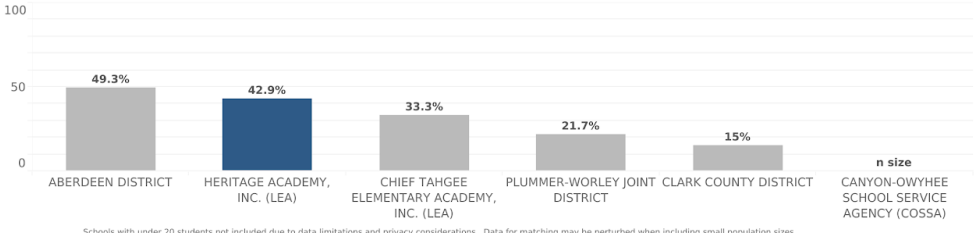
ABERDEEN DISTRICT	716	>99%	33%	19%
CANYON-OWYHEE SCHOOL SERVICE AGENCY (COSSA)	129	>95%	10%	23%
CHIEF TAHGEE ELEMENTARY ACADEMY, INC. (LEA)	92	>93%	5%	28%
CLARK COUNTY DISTRICT	109	74%	25%	17%
PLUMMER-WORLEY JOINT DISTRICT	352	>98%	<2%	21%

Select Student Group: All Students

Select Measure: Math Growth

Restrict to districts with higher performance on this ..: No

Math Growth, All Students



Schools with under 20 students not included due to data limitations and privacy considerations. Data for matching may be perturbed when including small population sizes.

Reading - IRI Fall to Spring Changes

Step 1. Pick a reference district

HERITAGE ACADEMY, INC. (LEA)

Step 2. Select characteristics for finding similar districts

Enrollment
Yes

Economically Disadvantaged
Yes

English Learners
Yes

Students with Disabilities
Yes

Step 3. Restrict the districts by characteristics (optional)

District/LEA Type (Traditiona/Charter/Vir..
All

Schedule Type (4 or 5 day)
All

Distance in miles
To 550
and Null values

Similar Districts Comparison Tool - 2019

	Enrollment	Percent Economically Disadvantaged	Percent English Learners	Percent Students with Disabilities
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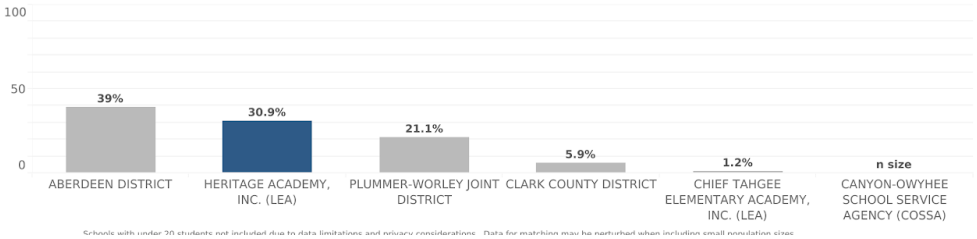
CLARK COUNTY DISTRICT	109	74%	25%	17%
PLUMMER-WORLEY JOINT DISTRICT	352	>98%	<2%	21%

Select Student Group: All Students

Select Measure: IRI Fall to Spring Change

Restrict to districts with higher performance on this ..: No

IRI Fall to Spring Change, All Students



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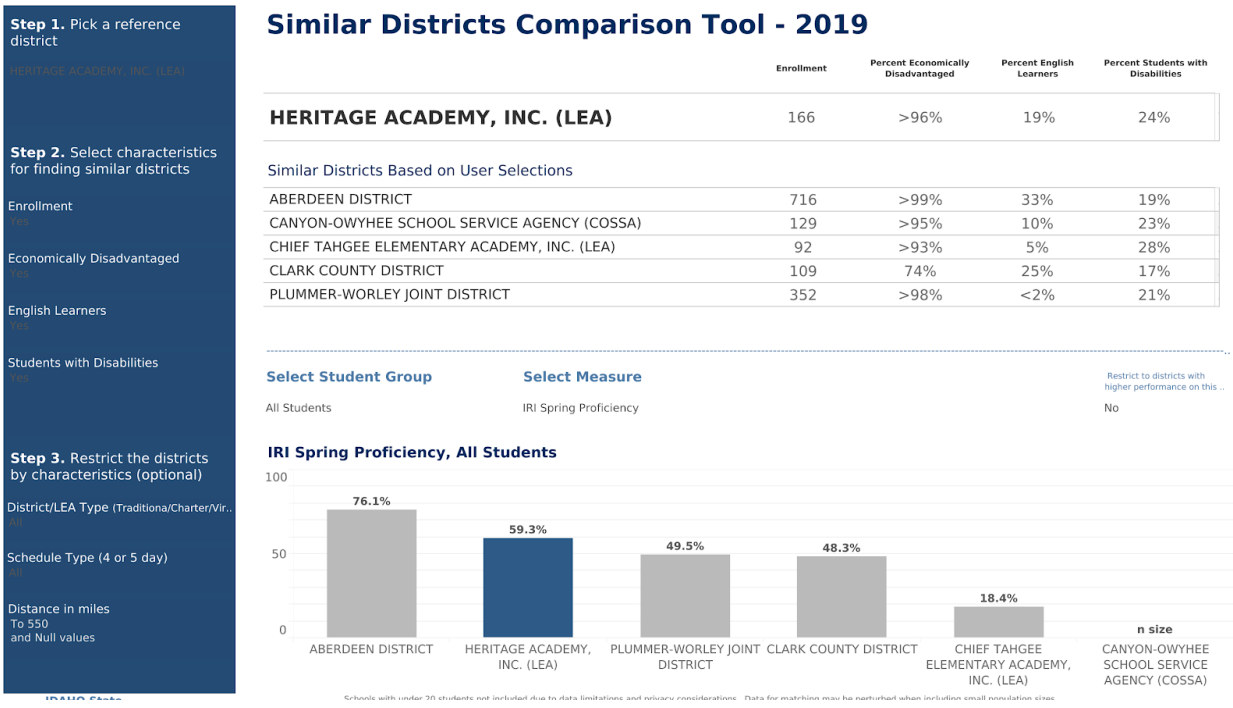
Reading - IRI Spring Proficiency



Heritage Academy - Progress Monitoring Data

2018/2019 Comparison to 2019/2020

January/Mid Year

Reading - ISIP by Tier

	18/19	19/20	18/19	19/20	18/19	19/20
	At Grade Level	At Grade Level	Near Grade Level	Near Grade Level	Below Grade Level	Below Grade Level
K	45	76	40	18	15	6
1	47	47	40	40	13	13
2	20	62	20	15	60	23
3	42	54	25	8	33	38
4	29	62	36	8	36	31
5	17	57	8	14	75	29
	33% >	60%	28% <	17%	39% <	23%

Growth in Achieving Proficiency - Reading

Already Proficient & Stayed Proficient	Not Proficient & Became Proficient	Not Proficient But Near Proficient	Not Proficient & Not Making Enough Growth
33%	27%	17%	23%
Well Served	Well Served	Well Served	Targeted for Intervention

Math - ISIP by Tier

	18/19	19/20	18/19	19/20	18/19	19/20
	At Grade Level	At Grade Level	Near Grade Level	Near Grade Level	Below Grade Level	Below Grade Level
K	50	65	30	18	20	18
1	56	27	31	27	13	47
2	29	50	21	29	50	21
3	50	69	17	8	33	23
4	35	54	41	23	24	23
5	14	58	10	17	76	25
	40.5% >	54%	25% <	20%	36% <	26%

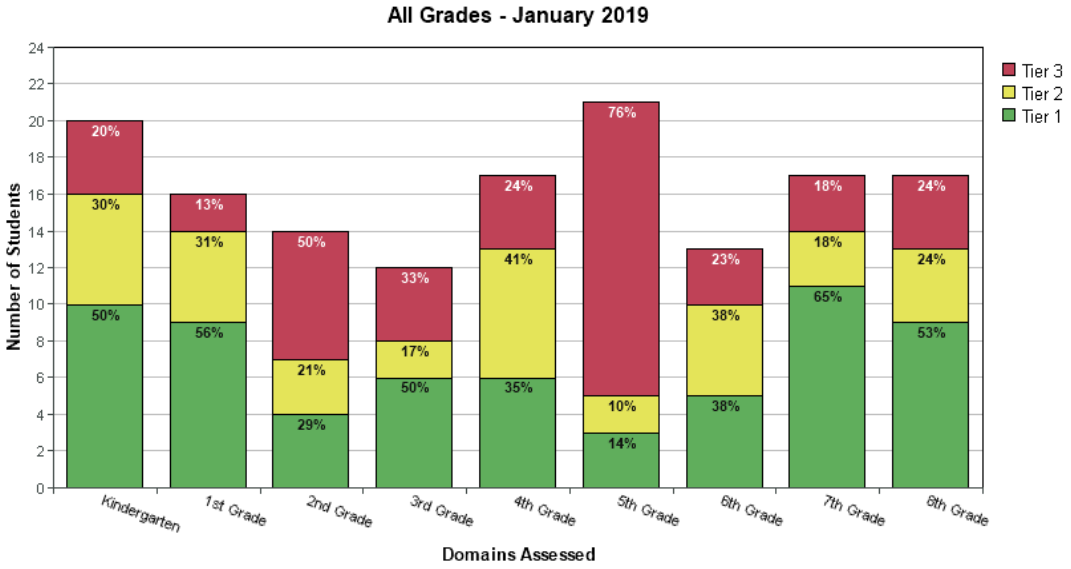
Growth in Achieving Proficiency - Math

Already Proficient & Stayed Proficient	Not Proficient & Became Proficient	Not Proficient But Near Proficient	Not Proficient & Not Making Enough Growth
41%	13%	20%	26%
Well Served	Well Served	Well Served	Targeted for Intervention

Summary - January 2019

ISIP™ Math results for Heritage Academy

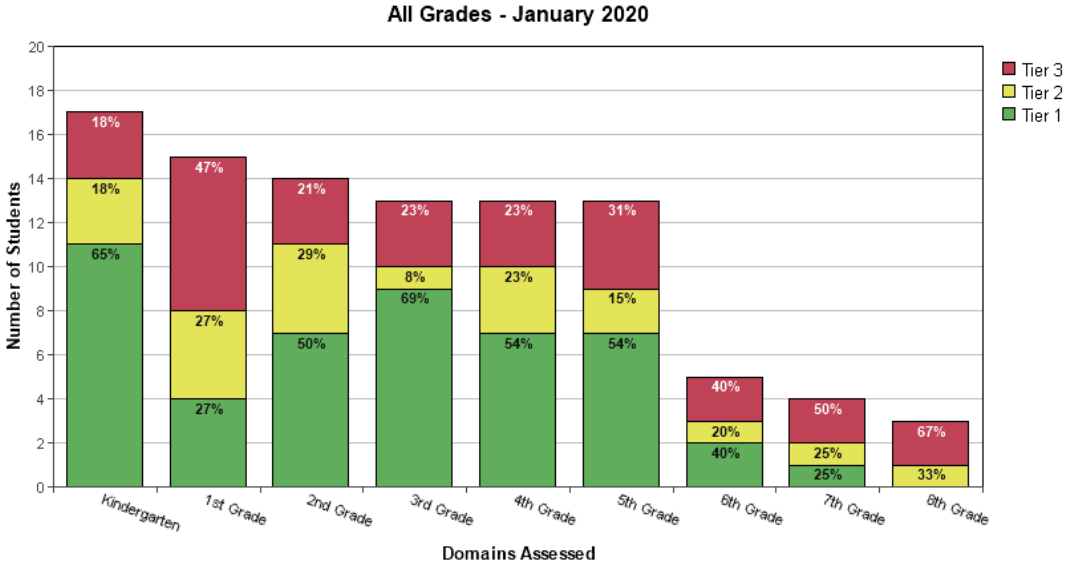
2018/2019 School Year



Summary- January 2020

ISIP™ Math results for Heritage Academy

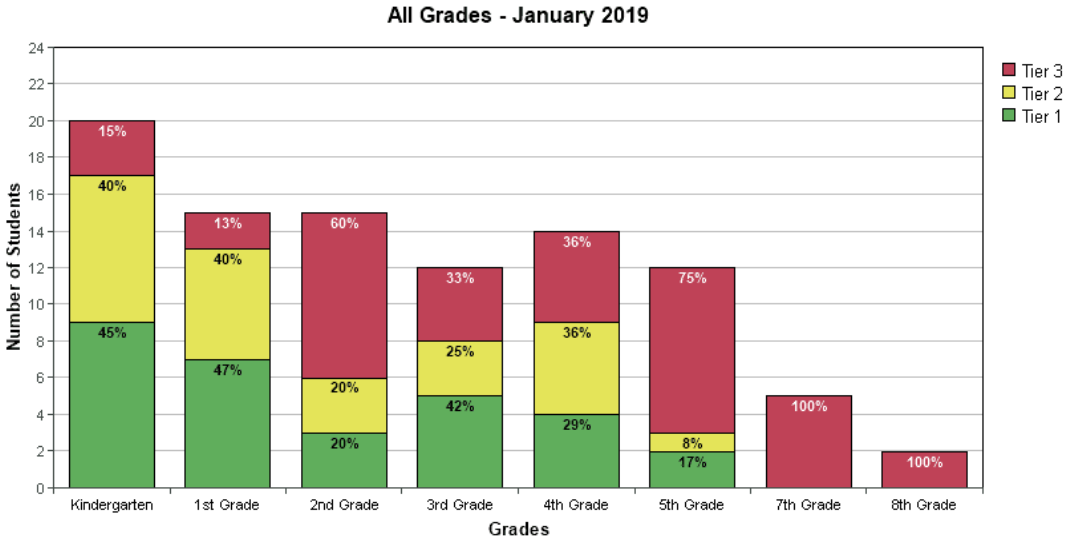
2019/2020 School Year



Summary - January 2019

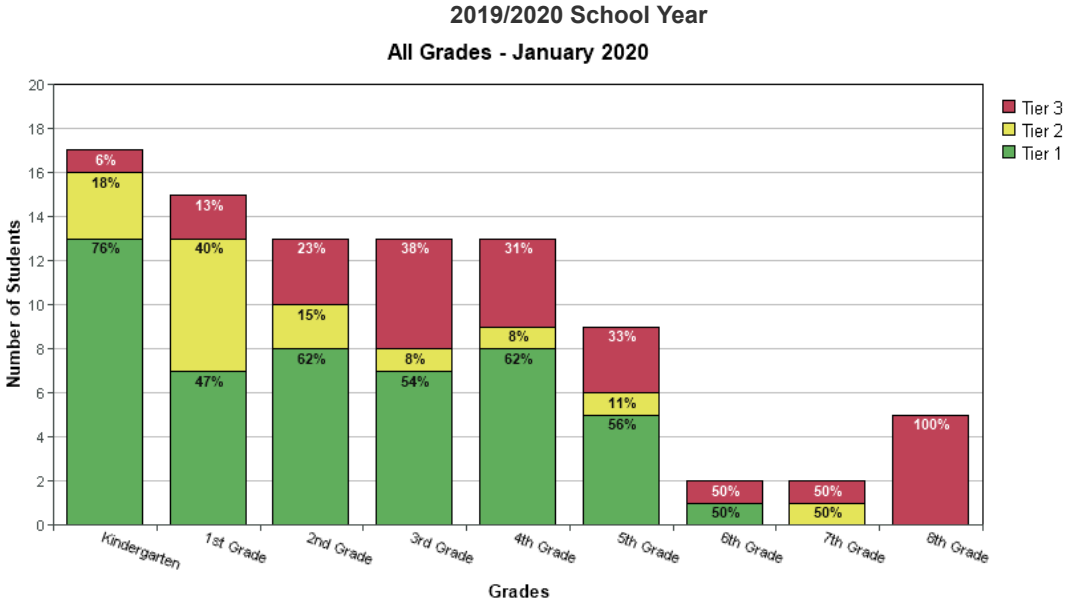
ISIP™ Early Reading results for Heritage Academy

2018/2019 School Year



Summary - January 2020

ISIP™ Early Reading results for Heritage Academy



Heritage Academy Initiatives

The following initiatives, programs and results from our school. Most of these have been in place for at least 2-3 years. Some have been in place for 6-7 years. All of these things are necessary to help students grow academically. We focus on the Idaho Core Standards, Bloom's Taxonomy and Maslow's Hierarchy of Needs as a foundation for our school programs.

- **ISAT Interim assessment results, processes and use of data**
- **Number and/or percentage of students who grew 1 level or more on the ISAT (some still would not score proficient and would not be captured by the Commission Performance Framework, even though they grew tremendously)**
- **Average point increase from 2018 to 2019 on ISAT by grade level**
- **Tri-Annual benchmark assessments (IStation, Aimsweb, Bridges, Core Phonics Survey, CKLA language arts) and monthly progress monitoring (IStation math and reading, Bridges, CKLA); RtI process (we add Bridges Intervention assessment, Gloss, ICan, more frequent Core Phonics Survey and Aimsweb)**
- **Regular, ongoing data analysis completed by team members (led by the school administrator and capacity builder) of benchmark data, annual assessment data and progress monitoring**
- **Assessment Team, School Accountability and Engagement PLC, RtI Team, FACE, Team, Elementary Team, Middle School Team, Special Services Team, Child Nutrition Team, Social Emotional Learning Team, School Leadership Team**
- **7 Mindsets (SEL), Sources of Strength, Extensive school counseling program, middle school advisory, love and logic, restorative practices**
- **Child Nutrition Program - free breakfast and free lunch for all students; free fresh fruit and/or vegetable snack for K-5**
- **Free school uniforms, washer and drying to wash clothes for students who don't have access to clean clothes**
- **Full day kindergarten (no additional cost)**
- **College of Southern Idaho adult education - EL, GED and technology classes in the evening**
- **Mentoring program for beginning and alternate route teachers; grow your own program to help paras interested in becoming teachers; 22 full-day professional development days built into the schedule. Most focus on data analysis, identifying and planning growth targets, math professional development or reading professional development**
- **Extensive board and staff strategic planning process, plans and outcomes (this year's plan is attached). We use an appreciative inquiry approach to strategic planning that results in a very detailed plan.**
- **Over 1000 pages of documentation submitted to Commission staff members over the past 3 years - none has been reflected in the school's annual performance reports or in comments or recommendations made by**

Commission staff members to the Commission. Documentation is primarily from the Idaho Department of Education and the Center for Education Reform (they did a complete review and analysis of our school three years ago)

Current and Ongoing Accountability - Heritage Academy

Here is a list of <u>some</u> of the ways Heritage Academy is already held accountable. All Idaho public charter schools are expected to be compliant with each area.

- ***These accountability measures would continue through both proposed performance certificates***

All Idaho public charter schools must meet academic, operational and financial standards required for every public school or local education agency(LEA). Agencies responsible for ensuring public charter schools meet or exceed all programmatic, statutory and regulatory requirements:

- The public charter school's **Board of Directors**;
    - School district/LEA policies
    - Legal oversight - Responsible for compliance with local, State, federal laws, rules and regulations
    - Financial oversight
        - Annual audit
        - Financial statements
        - Balanced budget with no additional tax levy ability
    - Operational oversight
        - Hiring practices
        - Bidding process and contracts
    - Mission, vision, compliance with charter
    - Compliance with local regulations (City, County, Building Inspection, Fire Inspection, Occupancy, etc.)
    - Compliance with Charter Commission (this workload has substantially increased since 2013)
- **Idaho Department of Education**;
    - Finance
        - Compliance with annual budget hearing notice, publication of budget and approval of budget
        - Submission of approved budget
        - Compliance with annual audit requirements

        - Submission of board-approved annual audit
        - IFARMS Annual Report submission
        - Coding by fund number to report publicly on School Report Card
    - Transportation
    - Child Nutrition Programs (along with the USDA)
    - Safe Schools
    - School Counseling, College and Career initiatives
    - Content Standards
    - Assessment (ISAT, IRI, Access WIDA, ISAT Alt, Civics Exam, Science EOC)
    - Compliance with instruction hours and school calendars
    - Compliance with federal programs that are connected to state programs
    - Teacher certification
    - Gifted and Talented Plan
    - State Limited English Proficiency/English Learner
- **Idaho State Board of Education**;
    - Administrative Rule (08.02.01, Rules Governing Administration; 08.02.02, Rules Governing Uniformity;08.02.03, Rules Governing Thoroughness;08.02.04, Rules Governing Public Charter Schools
    - Accountability System (developed and approved by SBOE)
    - Continuous Improvement Plan - must be submitted every year by Oct. 1
    - Teacher Evaluation System
    - Literacy Plan, Bullying Plan, College and Career, Gifted and Talented (yearly submissions)
    - Graduation Requirements
    - Career and Technical Education Programs
- **United States Department of Education**
    - Every Student Succeeds Act (ESSA) of the Elementary and Secondary Education Act
        - Title IA, Title II, Title III, Title IX, REAP, RISL, Homeless, McKinney Vento Act, Migrant etc.
    - IDEA
    - 3 - 5 year Federal Programs review - Robust academic/ operation measures for compliance and evidence submission
    - Annual - Review of academic/ operation measures for compliance systematic reviews and evidence collection
    - Annual - Maintenance of Effort
    - Federal Programs Financial review
- **United States Office of Civil Rights**
    - Americans with Disabilities Act

    - Section 504 of the Rehabilitation Act
    - CRDC data collection (every 2 years)
- **Idaho Public Charter Commission**
    - Charter Dashboard
    - Financial submissions (are these changing this year?)
    - Annual Performance Framework (Academic, Operational, Financial)
    - Annual Performance Framework appeal
    - Mission-specific goal development
    - 5 Year review process w/ Renewal Application and evidence
    - 5 Year review Site Visit
    - Appeal to Site Visit report with supporting evidence
    - Charter revision process for program changes
    - Charter revisions when academic measures changes at state/federal (like referencing old ISAT tests)
    - Charter renewal hearings (if you appeal the recommendation)... even if you do not decide to appeal, this takes immense legal consideration with is time and money for schools
    - Reporting directly to the Commission at PCSC meetings (seems like most of this is when a school is struggling financially but I've seen it happen for program changes, charter revisions).
- **AdvancEd/Cognia** (Accreditation Requirements) - SEE ATTACHED 5 year REVIEW PROCESS
    - Continuous school improvement model based on multiple measures (academic/operationally/strategically)
    - Online schools are review based on recommended Digital Standards
    - Agency compliance check (state, BOE, federal, PCSC)
    - Data collection (annually and goal specific)
    - Evidence submissions tied to Cognia Standards

AdvancED Performance Accreditation

STEP BY STEP

Application & Readiness

1 **Contact an AdvancED managing office and complete an application.**
An AdvancED representative will contact you to prepare for a Readiness Review. This contact person will provide you support throughout the process. Once the Readiness Review is complete, you will receive a report from the review and be asked to confirm your commitment to move forward with the process.

Internal Review

2 **Collect student performance data** before or in conjunction with the Self Assessment to gain a comprehensive picture of student performance.

3 **Conduct the Self Assessment** by analyzing data and using supporting evidence to rate performance against a series of evaluative criteria.

4 **Conduct stakeholder surveys** as part of the Self Assessment to get feedback from representative parents, students and staff during a specific time frame. Analyze results and complete the stakeholder feedback diagnostic.

5 **Write an Executive Summary** that describes and celebrates the school or system, defines purpose and direction and identifies achievements and challenges.

6 **Create a quality improvement plan** based on analysis of data that aligns improvement goals with diagnostic results, communicates purpose and direction and builds shared commitment.

7 **Demonstrate compliance with AdvancED, government and partnership requirements by:**

- ✓ Reporting substantive changes
- ✓ Sharing crisis/security management plan
- ✓ Demonstrating effective financial audit system
- ✓ Engaging in continuous improvement
- ✓ Verifying that across systems all schools meet accreditation standards

External Review

8 **Work with AdvancED to conduct and host an External Review.** Led by an AdvancED certified Lead Evaluator, a rigorously trained review team will visit your institution. This team will:

- Perform classroom observations using the **AdvancED Effective Learning Environment Observation Tool™ (eleot™)**
- Review student performance and stakeholder feedback
- Conduct internal and external stakeholder interviews
- Determine the extent to which your institution meets *AdvancED Standards for Quality* and other evaluative criteria as compiled in the AdvancED Index of Education Quality™ (IEQ™)
- Examine additional artifacts and evidence

Through the External Review process, institutions receive a comprehensive report of the team's findings with recognition of Powerful Practices, Opportunities for Improvement and Improvement Priorities.

Post Review

9 **At the end of the External Review, findings are presented, and the initial IEQ score is announced, pending further review by the AdvancED Accreditation Commission.**
In January and June of each year, the AdvancED Accreditation Commission meets and grants an accreditation status.

Accreditation STATUS

10 **Following accreditation, institutions should maintain momentum for continuous improvement by:**

- Engaging in ongoing self-reflection, internal review and stakeholder communication
- Responding to Improvement Priorities for ongoing improvement
- Submitting their Accreditation Progress Report within two years of the External Review
- Celebrating the reward of hard work, success and dedication!

PCSC Staff Summary of Heritage Academy
Performance Certificate Negotiation Requests

1. Mission, Vision, and Key Design Elements

   Heritage Academy's Board of Directors has adjusted the school's mission and vision statements through a strategic planning process. The school proposes to revise the performance certificate to include the updated mission and vision. These proposed changes are reflected in Sections 3A and 3C of the school's proposal.

2. Maximum Enrollment

   Heritage Academy is proposing to lower their maximum enrollment from 450 to 207 and reduce their per-grade cap size to 20 students in grades K-3, 22 in grade 3, and 25 in grades 4-8. This proposed change is reflected in Section 5B of the school's proposal.

3. Attendance Area

   Heritage Academy is proposing to adjust their attendance area from the Jerome School District boundaries to a more specific description. This would allow students living outside of the traditional school district boundaries, but within the newly defined Heritage Academy boundaries, to qualify for attendance area enrollment preference. This proposed change is reflected in Section 5E of the school's proposal.

4. Terms of Agreement

   Heritage Academy's current performance certificate is valid from July 1, 2017 – June 30, 2022. The school is proposing that the PCSC adopt a new certificate with term dates of July 1, 2020 – June 30, 2025 and that the PCSC adopt two consecutive 5 year terms, effective February 13, 2020. This proposed change is reflected in Section 1B of the school's proposal and further explained in the cover letter provided by the school.

   Section 4E of the school's proposal explains that the school is proposing that the 2020-2025 certificate term serve as a reparation period for the school and asks for acknowledgment of unfair treatment.

5. Performance Framework

   Heritage Academy is proposing that the PCSC waive the incorporation of the Performance Framework until after June 30, 2025. Additionally, the school proposes that it shall be exempt from financial and enrollment measures for the length of this performance certificate term and that the framework not serve as the basis for renewal decisions. The specifics of these proposed changes are described throughout Section 4 of the school's proposal.

6. Authorizer's Right to Review

   Heritage Academy proposes that the PCSC's right to review academic, operational, and financial documentation be limited to once per year and that all site visits be conducted by only 3rd party teams, mutually agreed upon by the school and the authorizer. Details of this request are included in Section 4F of the school's proposal.

7. Annual Budgets

   Heritage Academy proposes that budgets submitted to the PCSC each year only be required in the same format as that requested by the SDE. As background, the certificate currently includes: "other formats as may be reasonably requested by the Authorizer". Current procedures require that budgets are submitted at the same time of year to both the SDE and the PCSC and that schools may choose to send reports to the PCSC in the same format or a simplified version. Additional reporting requirements include up to quarterly balance sheets and budget to actual comparison reports. This proposed change is included in Section 6D of the school's proposal.

8. Revocation

   Heritage Academy proposes that the PCSC waive its right to revoke the school's charter due as allowable under the current law through the end of the proposed performance certificate period (June 30, 2025) except for substantial, material non-compliance with state and federal law. Details of this proposal are included in Section 7C of the school's proposal.

SUBJECT

PCSC Director's Report

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Code §33-5209C(1)
Idaho Code §33-5209C(2)
PCSC Policy Section IV

BACKGROUND

The PCSC Director oversees the day-to-day management of the authorizing office. This agenda item provides opportunity for a brief report regarding actions taken and work in progress at the staff level.

DISCUSSION

- The PCSC Annual Report is complete and posted online. The report is also included in these meeting materials. https://chartercommission.idaho.gov/pcsc-schools/pcsc-annual-report/

- FY19 annual reports for all PCSC schools are complete and posted online. A summary chart is included on page 5 of the PCSC Annual Report included in these materials. https://chartercommission.idaho.gov/pcsc-schools/by-region/

- An error was identified in a school's conditional status update and the mission specific goals section of that same school's annual report. This error has been corrected in both the FY19 and the FY18 reports.

- Q2 Income Statement and Balance Sheets have been collected from all schools for annual review.

- A minor performance certificate amendment for Treasure Valley Classical Academy (TVCA) was approved.

- PCSC Director will provide a brief summary of outstanding compliance issues.

- PCSC staff requests clarification on PCSC policy Section III.A.xii, regarding the definition of "minor" amendments. The text reads: "In accordance with IDAPA 08.02.04.302.02, the PCSC delegates to the Public Charter School Commission Director authority to approve minor amendments to a school's charter or performance certificate."

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

N/A

Idaho Public Charter School Commission

2019 Annual Report

IDAHO PUBLIC CHARTER SCHOOL COMMISSION

304 NORTH 8TH STREET, ROOM 242
BOISE, IDAHO 83702

PHONE: (208) 332-1561

PCSC.IDAHO.GOV

ALAN REED, CHAIRMAN

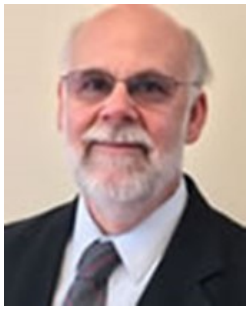
JENN THOMPSON, INTERIM DIRECTOR

PUBLIC CHARTER SCHOOL COMMISSION

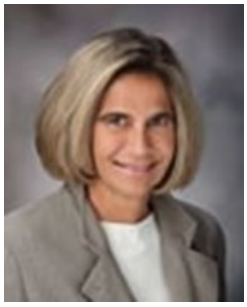
Alan Reed, Chairman
Term Ends 2022
Appointed by Pro Tem

Brian Scigliano, Vice Chair
Term Ends 2020
Appointed by Governor

Sherrilynn Bair
Term Ends 2020
Appointed by Governor



Nils Peterson
Term Ends 2023
Appointed by Speaker



Wanda Quinn
Term Ends 2020
Appointed by Governor

Kathleen “Kitty” Kunz
Term Ends 2023
Appointed by Pro Tem

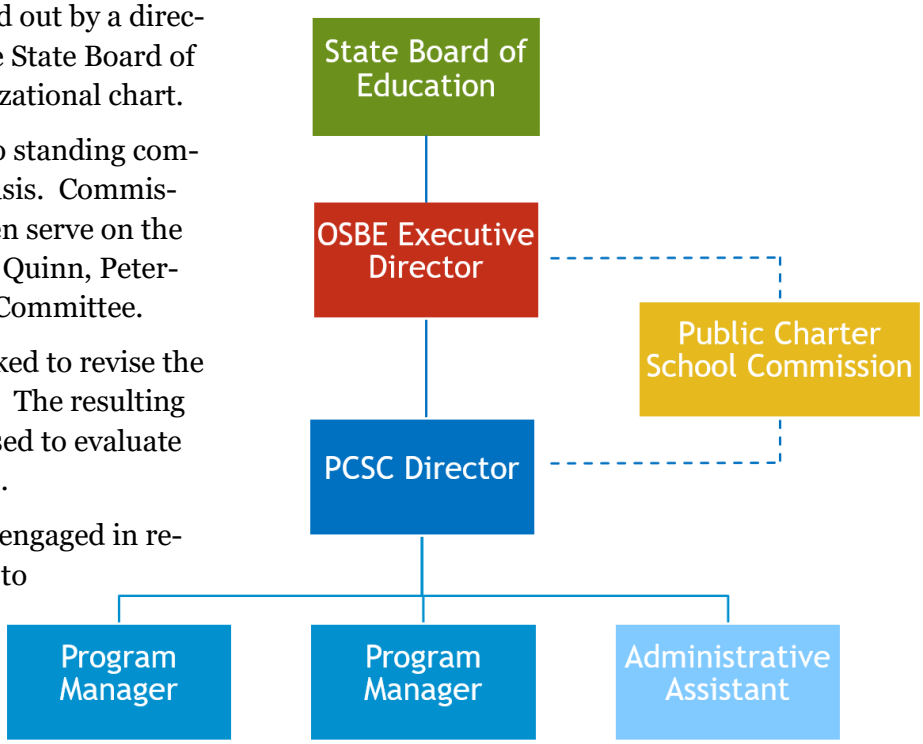
Julie Van Orden
Term Ends 2023
Appointed by Speaker

MISSION STATEMENT

The Public Charter School Commission’s mission is to ensure PCSC-authorized public charter schools’ compliance with Idaho statute, protecting student and public interests by balancing high standards of accountability with respect for the autonomy of public charter schools and implementing best authorizing practices to ensure the excellence of public charter school options available to Idaho families.

ORGANIZATIONAL STRUCTURE

The work of the commission is carried out by a director and a small team employed by the State Board of Education as illustrated in the organizational chart.



Additionally, the PCSC maintains two standing committees that meet on an as-needed basis. Commissioners Scigliano, Bair, and Van Orden serve on the Petition Committee. Commissioners Quinn, Peterson, and Kunz serve on the Renewal Committee.

In 2018, the Petition Committee worked to revise the PCSC's new petition evaluation tools. The resulting Standard of Quality document was used to evaluate 10 new and transfer petitions in 2019.

The Renewal Committee is currently engaged in reviewing the academic measures used to evaluate schools for the purpose of renewal decisions. The committee intends to hold feedback sessions and continue researching through March and will make specific revision recommendations to the PCSC in the spring.

KEY DOCUMENTS

Performance Certificate

Within 75 days of approving a new charter school petition, the authorizer and the charter school's board must execute an agreement for operations. In Idaho, this document is called a Performance Certificate. The certificate establishes the terms and conditions under which the school can operate, including how many students and what grade levels the school may serve, as well as the key design elements the school's model will deliver. All certificates provide a 5-year term of operation.

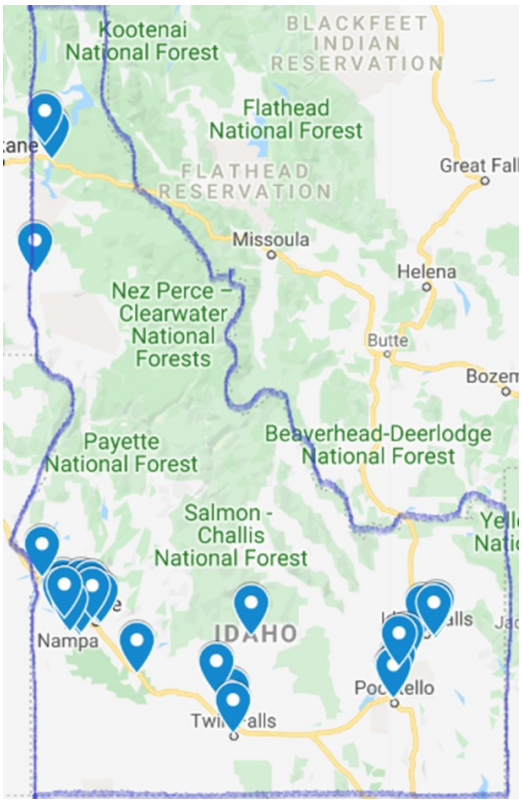
Performance Framework

All performance certificates must include a performance framework that establishes the minimum acceptable standards a school must meet in order to earn a subsequent 5-year term of operation. Authorizers have some flexibility in how measures and metrics are defined. However, all frameworks must consider proficiency, growth, college and career readiness, and board stewardship. The PCSC's framework considers 34 measures across the categories of academic, operational, and financial performance.

Annual Report

Each year, authorizers are required to publish a report that communicates each school's outcomes in relationship to the framework measures adopted in the school's operational certificate.

This report provides continuous improvement data for the school and serves as the primary data source for the commission when considering whether to issue a subsequent operational term to any given charter school.



SCHOOLS SERVED

The Idaho Public Charter School Commission currently serves as authorizer for 52 schools. 45 of these schools were operational during the 2018-19 school year. 7 are pre-operational and plan to open fall of 2020 or 2021.

While the PCSC serves schools across the state, 70% of PCSC portfolio schools are located in either Eastern Idaho or the Treasure Valley.

Approximately 19,200 students attended PCSC portfolio schools last year. This represents 7% of the students who attended Idaho public schools during the 2018-19 school year.

22% of PCSC portfolio schools serve grades K-8. 15% serve only secondary grades, and 18% provide their unique instructional model for students from Kindergarten through graduation.

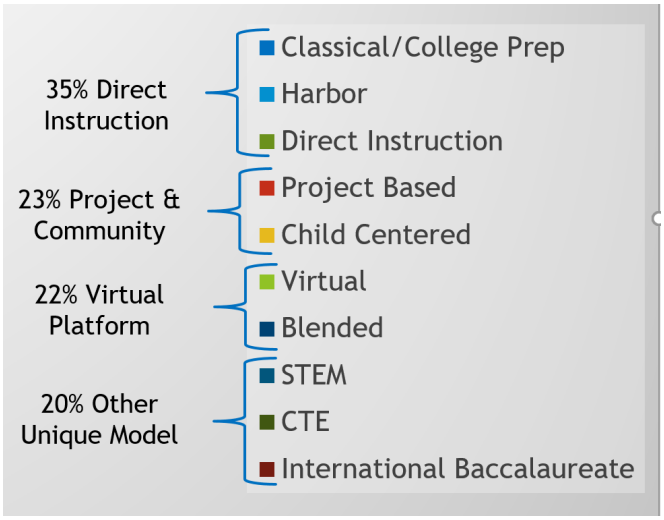
"Let us put our minds together and see what life we can make for our children."
— Sitting Bull

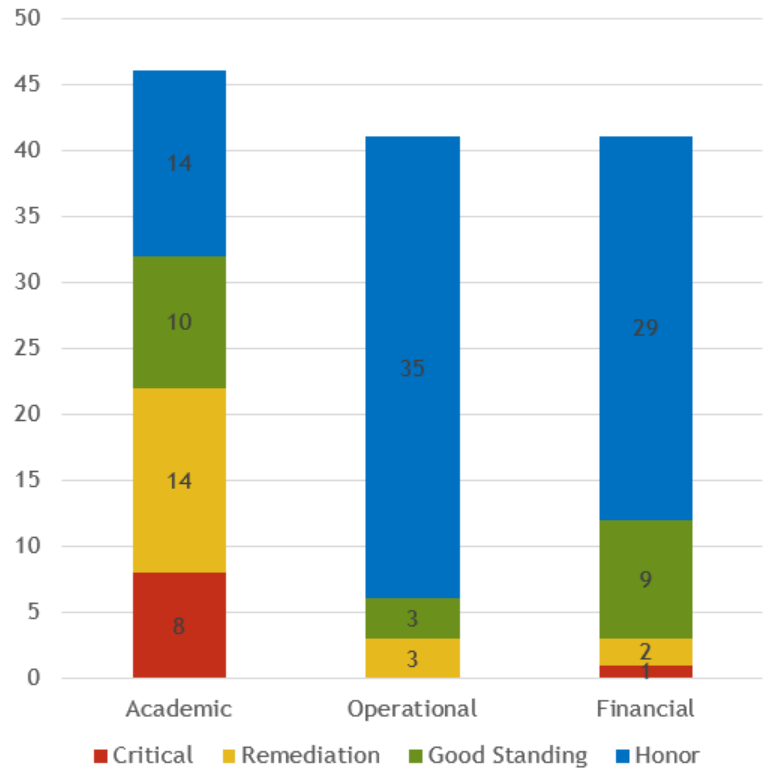
PORTFOLIO DIVERSITY

The PCSC values choice in education and has developed a portfolio that offers a wide variety of instructional models to Idaho families. PCSC schools include models that celebrate the importance of early childhood discovery, such as Montessori and Waldorf, as well as models that deliver a classical education that includes Latin instruction and accelerated learning plans. Instructional models at PCSC schools also include STEM, Project Based Learning, International Baccalaureate, and an Idaho specific model called Harbor.

In addition to diverse instructional models, the PCSC portfolio also offers a variety of delivery methods. These include face-to-face, blended learning, and virtual models, as well as 4-day weeks, 5-day weeks, and traditional, modified, and year-round calendars.

All charter schools in Idaho enroll students based on the equitable selection process established in Idaho Code. This process provides all students equitable access to Idaho's charter schools.





"Public charter schools are unique public schools that are allowed the freedom to be innovative while being held accountable for advancing student achievement…"

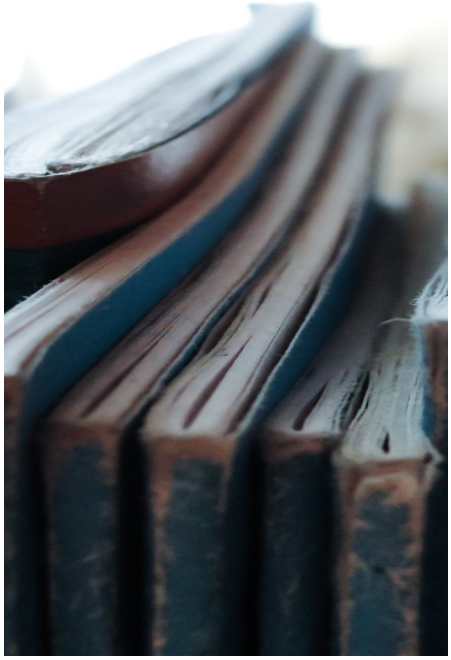
— National Alliance for Public Charter Schools

SCHOOL OUTCOMES FY19

Annually each PCSC school's performance outcomes are evaluated against the standards established in the PCSC's framework. School's receive an accountability designation of honor, good standing, remediation, or critical in three categories (academic, operational, and financial). Accountability designations are determined based on the percentage of points earned across multiple measures in each category. The chart above represents the distribution of accountability designations across PCSC schools during the 2018-19 school year.

Schools that earn an academic accountability designation of Good Standing or Honor in the academic section are guaranteed to receive another 5 -year operational term when the school is considered for renewal. 61% of the schools that earned a Critical or Remediation accountability designation in the academic section are also identified as CSI UP, CSI Grad, TSI or ATSI by the SDE. Through this identification, schools receive additional support and funding targeting improvement in academic outcomes. Because of the scope and quality of services and resources provided by the SDE, the PCSC does not currently offer additional supports in this area.

However, as the operational and financial issues encountered by charter schools are often unique to charter schools, the PCSC does provide additional support in these areas. Schools that earn a Critical or Remediation accountability designation in the operational or financial section receive additional evaluation, direction, and progress monitoring from the PCSC. The ultimate goal of this work is to help schools strengthen their outcomes.



PRIMARY POINTS OF ACTION—COMMISSION

Idaho statute provides three opportunities for authorizers to make operational decisions about any given charter school. These include: the school's initial petition hearing, the school's renewal hearing (every 5 years), and on any deadlines established by an operational condition adopted during the renewal process.

At a petition hearing the Commission must approve, deny, or conditionally approve a petition. At the time of renewal the Commission must renew, non-renew, or conditionally renew a school's performance certificate. If a renewal condition is not met by the established deadline, the PCSC must decide whether to allow the school to continue operating for the remainder of its existing term.

In many ways, the PCSC functions as a risk management team, assessing the initial risk to taxpayer dollars and student achievement, and then revisiting that assessment regularly to determine whether the risk remains below the threshold established by the Performance Framework.

"There are no shortcuts to true excellence."
— Angela Duckworth

PRIMARY POINTS OF ACTION—STAFF

In between a school's initial petition approval and each 5-year renewal decision, the PCSC staff performs the work of ongoing oversight. This team prepares annual reports for each school aligned to the performance framework. They monitor financial reports and issue notifications of fiscal concern when there is reason to believe that a school may not remain financial viable for the remainder of their operational term. They also manage interventions and investigations when necessary— issuing courtesy letters detailing the concerns a school needs to address for minor issues and reporting more significant issues to the appropriate investigative bodies.

In addition to oversight work, PCSC staff visit schools on a rotational schedule, provide quality resources in areas not addressed by other entities, and deliver proactive communications in an effort to build strong relationships between the authorizer and its schools.

FINDING BALANCE

The PCSC strives to find balance in its dual roles of "Educate and Inform" and "Oversee and Enforce".

Communicating policy and procedure, providing annual reports, and discussing concerns with honesty and kindness in a timely manner sit on one side of the scale.

On the other side of the scale is the responsibility to protect taxpayer dollars and student achievement through responsible authorizing decisions.

PHASES OF AUTHORIZER DEVELOPMENT

In addition to making decisions about new school approvals and renewing existing schools' operational terms, authorizers serve an important role in facilitating choice, quality, and growth of the sector.

Initially, an authorizer's focus is on providing diverse options for families. The goal during this phase is to respond to community demand for choice while remaining sensitive to data such as population growth and district yield rate to prevent oversaturation. The PCSC's Petition Evaluation Reports help ensure that petition decisions are well-informed.

As an authorizer begins to work with more schools, the work of authorizing evolves to include quality as well as choice. During this phase, evaluating academic, financial, and operational performance are primary actions of all authorizers. This work helps school boards and school leaders identify areas of potential growth. It informs taxpayers and lawmakers about the return on their investment in charter schools, and it ultimately informs the authorizer's renewal decisions.

Once its schools are performing well, an authorizer can begin to focus on replicating its strongest models. At this mature stage of school development, new school openings are less frequent and more stable.

While charters have existed in Idaho for twenty years, only a few school models have found themselves in a position to effectively replicate, this includes the Gem Innovation blended learning schools as well as the Harbor schools located in Nampa.

Although choice and growth are always in motion, the PCSC is also concerned with supporting its schools as they strengthen and grow.

LOOKING FORWARD

2019 has been a record year of growth in Idaho's charter sector. The PCSC saw 10 charter petitions, the largest annual number in its history. Six new schools are currently preparing to open their doors for the first time. This year has also been one of reflection and lessons learned.

Several improvement projects are in progress. First, the PCSC is evaluating the structure of the academic measures used in its framework to ensure accuracy and credibility of annual reports. Second, the PCSC intends to clarify and document standard intervention procedures to ensure consistency in implementation. Third, the PCSC is working to revise its site visit rubric to better align it with its framework to ensure that site visits are more meaningful for schools and that the contextual information gathered can be used to supplement annual report data during renewal.

Much work lies ahead. The PCSC is committed to its continued service as a quality authorizer in Idaho.

IDAHO
Public Charter
School Commission

SUBJECT

Renewal Committee Update

APPLICABLE STATUTE, RULE, OR POLICY

N/A

BACKGROUND

In October 2019, the PCSC tasked the Renewal Committee with the exploration of opportunities for increasing performance framework flexibility. The committee was directed to form recommendations to the PCSC regarding a model for ensuring that all schools have the opportunity to be evaluated using fair and meaningful performance framework standards.

DISCUSSION

The Renewal Committee will update the PCSC regarding its plan and progress for the performance framework flexibilities exploration project.

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

N/A

SUBJECT

PCSC Discussion: location of regular meetings; legislative update; review of PCSC policy

APPLICABLE STATUTE, RULE, OR POLICY

N/A

BACKGROUND

1. On October 10, 2019, the PCSC adopted a calendar of regular meetings for 2020. The motion passed at that time identified meeting locations outside of Boise for the PCSC regular meetings in April, October, and December. However, the logistics of relocating meetings has proven complicated.

2. Several bills will be presented during the 2020 legislative session that will impact Idaho's public charter schools. The PCSC may choose to support, oppose, or remain neutral with regard to proposed legislation.

3. The PCSC's current policies were originally adopted in 2015, and were revised with stakeholder feedback in both 2016 and 2018. Further revision may be appropriate in 2020.

DISCUSSION

1. Commissioners have expressed interest in holding all regular meetings in Boise during 2020 to alleviate the additional travel burden for staff during this year of transition. (Action Item)

2. PCSC Staff will provide an update of 2020 legislation relevant to charter schools. (Action Item)

3. Commissioners have expressed interest in conducting a review process of all PCSC policy in 2020. Commissioners will discuss plans for moving forward on this work. (Action Item).

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

1. A motion regarding the location of the April, October, and December, 2020 regular commission meetings could be made at the discretion of the commission.

2. A motion regarding support or opposition of any particular piece of legislation could be made at the discretion of the commission.

3. A motion directing the review of PCSC policy could be made at the discretion of the commission.