

IPCSC Meeting - Day 2

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Day 2: Thursday June 10th, 2021; 9:00 A.M. MT

I. WRITTEN PUBLIC COMMENT

Written public comment may be submitted to the IPCSC prior to the meeting by mail (P.O. Box 83720, Boise, Idaho, 83720) or email (pcsc@osbe.idaho.gov).

Please note public comment related to a specific agenda item will be presented during that agenda item.

This section of the agenda is reserved for public comment related to topics not on the current agenda.

II. PRE-OPENING SCHOOL UPDATE

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(6)

BACKGROUND

Idaho Code allows authorizers to establish reasonable pre-opening requirements “to monitor start-up progress of newly approved public charter schools and ensure that they are prepared to open smoothly on the date agreed, and to ensure that each school meets all building, health, safety, insurance, and other legal requirements for school opening”

DISCUSSION

The IPCSC authorizes three (3) charter schools approved to open in the fall of 2021. These schools include: Gem Prep Meridian – North, Alturas Preparatory Academy, and Cardinal Academy.

IPCSC staff conducts a series of meetings with each pre-opening school to track the school’s progress toward opening day.

SPEAKER

IPCSC Program Manager, Jared Dawson

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

No Action.

III.A. CONSIDERATION OF FAILURE TO MEET PRE-OPENING CONDITION CARDINAL ACADEMY

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(6)

BACKGROUND

The IPCSC approved a new charter school petition for Cardinal Academy on 12/10/20 with the following conditions:

“a) No later than May 26, 2021, the school must evidence 50 students by record of accepted offers; and

“b) No later than May 26, 2021, the school must evidence award of 100% of the anticipated grants and philanthropic dollars included in the pre-operational and break-even year 1 budgets as presented in the petition; and

“c) No later than May 26, 2021, the school must evidence a fully executed facility lease specifying that the annual lease payment will not exceed the state reimbursement for facilities and lottery funds received by the school in any given year as described in the petition.”

In December of 2020, IPCSC staff recommended denial of the petition or conditional approval including conditions “b” and “c” as stated above. Condition “a” originally stated a minimum enrollment of 81 students (90% of the enrollment number the school presented as the break-even minimum enrollment in its petition). During the hearing, petitioners negotiated the number of required students in condition “a” down to 50.

DISCUSSION

Cardinal Academy met condition “b” by evidencing award of grant dollars. The school has presented a fully-negotiated lease with regard to condition “c”. However, the school has chosen to wait for the IPCSC decision on this agenda item before executing the lease agreement.

The school allocated \$10,000 of pre-operational grant funds to student recruitment and has marketed heavily over the past few months, including evening news features, open houses, and robust social media campaigns. Despite those efforts, the school has fallen significantly short of meeting condition “a”.

As of May 26th, 2021 the school has enrolled approximately 26 students. The IPCSC must consider whether to delay the school’s opening for failure to meet a pre-opening condition.

At this time, it does not appear likely that the market demand for this program is sufficient for the school to be a financially sustainable project long-term.

SPEAKER

Emily Bergstrom, Cardinal Academy Director, and Patricia Kempthorne, Cardinal Academy Board Chair.

IMPACT

If the IPCSC chooses to delay the school's opening until 2022, the school's performance certificate term end date would remain the same, and the school could attempt to meet the existing pre-opening conditions next year.

Alternatively, the IPCSC could take no action. In that case, the school would open in the fall of 2021 and both state and federal dollars would begin flowing to the school in July of 2021.

STAFF COMMENTS AND RECOMMENDATIONS

The academic and social/emotional programs are well developed. The implementing team is high-quality, hard-working, and passionate.

However, the situation presents a significant risk to taxpayer dollars in that the public funds flowing to and through the school to pay for the facility, curriculum, and social programs will not prove a long-term educational investment if the school is not financially sustainable after philanthropic dollars have been exhausted.

IPCSC staff recommends that the IPCSC move to delay Cardinal Academy's opening until fall of 2022 on condition that the established conditions are met.

COMMISSION ACTION

No action; OR

A motion to delay Cardinal Academy's opening until fall of 2022 on condition that the school is able to meet the pre-opening conditions established in the school's current performance certificate by May 31st of 2022.



May 26, 2021

To: Idaho Public Charter School Commission
Chairman Alan Reed
Vice-Chair Brian Scigliano

Re: Federal Charter School Program (CSP) Grant Support for Cardinal Academy

Dear Chairman Reed and members of the Idaho Public Charter School Commission,

I am writing to share with the Idaho Public Charter School Commission that Cardinal Academy in Boise has been approved under Idaho's federal *Communities of Excellence* CSP grant program for a start-up grant of up to \$376,085. These dollars are available to the school on June 1, 2021, or thereafter, contingent on receiving formal approval from the Idaho Public Charter School Commission to open their doors to students in 2021.

Grant funds must be expended in full by 09/30/2023. The CSP grants to State Entities (SE) (Bluum in the case of Idaho) is a competitive grant program that enables State entities to award subgrants to eligible applicants in their State to open and prepare for the operation of new charter schools and to replicate and expand high-quality charter schools. Grant funds must also be used by the State entity to provide technical assistance to eligible applicants and authorized public chartering agencies in opening and preparing for the operation of new charter schools, or replicating or expanding high-quality charter schools; and to work with authorized public chartering agencies to improve authorizing quality, including developing capacity for, and conducting, fiscal oversight and auditing of charter schools.

The use of grant funds is restricted to the activities defined in the proposal submitted and funded by the U.S. Department of Education (ED).

Should you have any questions or concerns please do not hesitate to reach out to me.

Sincerely,

A handwritten signature in black ink, appearing to read "Terry Ryan".

Terry Ryan
CEO

Cc: Emily Bergstrom, Deborah Hedden-Nicely and Cardinal Academy Board



J.A. and KATHRYN
ALBERTSON FAMILY
FOUNDATION

May 26, 2021

Alan Reed
Idaho Public Charter School Commission Chairman
304 North 8th St., Suite 242
Boise, Idaho 83702

Dear Commissioner Reed:

The J.A. and Kathryn Albertson Family Foundation has been a long-time supporter of The Salvation Army and its work to care for and educate pregnant and parenting teens in Idaho. We have continued to support this important work through a recent grant award in the amount of \$423,000 to the proposed Cardinal Academy public charter school.

We feel the partnership between The Salvation Army and Cardinal Academy will enhance the lives of these very young parents and provide much needed educational opportunities to ensure they complete high school. We want to emphasize that we are very much in support of the school and intend to follow through with our grant award to them. We believe in the mission and vision of Cardinal Academy and in their ability to attract an increasing number of students during their first year of operation.

I hope you will continue to support the efforts of Cardinal Academy as they work to reach some of the most vulnerable students in our community.

Sincerely,



Jamie Jo Scott

III.B. CONSIDERATION OF FAILURE TO MEET PRE-OPENING CONDITION PEACE VALLEY CHARTER SCHOOL

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(6)

BACKGROUND

The IPCSC conditionally approved Peace Valley Charter School (PVCS) to begin operating in 2018. The pre-opening conditions included:

1. PVCS will amend the petition to satisfactorily address the remaining deficiencies noted in the petition evaluation rubric, as evaluated by PCSC staff, prior to 8:00 a.m. on December 4, 2017.
2. PVCS will file the draft amendment to Article 9 of its Articles of Incorporation with the Secretary of State prior to 8:00 a.m. on December 4, 2017.
3. PVCS will demonstrate completion of the alignment of its K-6 curriculum with the Idaho Content Standards no later than June 1, 2018. Curriculum for any additional grades will be fully aligned by June 1 of each calendar year in which PVCS begins offering those grades.
4. PVCS will achieve accreditation candidacy status by July 1, 2019, and full accreditation through the Northwest Accreditation Commission by July 1, 2021.
5. PVCS will provide to the PCSC a balanced budget that is fully documented, including facility contracts and enrollment lottery results, no later than June 1, 2018, in order to exercise the option to open in fall 2018.

During the initial application process, and in response to concerns expressed by IPCSC staff, PVCS's founders suggested that achieving accreditation (condition 4) would provide third party guidance and tools to assist the founding team in establishing a high-performing school. The IPCSC agreed that this solution would allay its concerns that the school was not prepared for effective operations.

Conditions 1, 2, 3, and 5 were completed prior to the school's opening. Condition 4 was due in two phases. The school did not meet the first deadline in 2019, and presented a school update to the IPCSC in September of 2019 to explain the situation.

IPCSC meeting minutes from 9/19/19 note that the expert representative from the accrediting body was confident that the school could earn its candidacy status in a few months and that there was sufficient time for the school to become fully accredited before the 2021 deadline.

DISCUSSION

PVCS is not on-track to meet pre-opening condition 4. The school has not pursued accreditation and has not achieved candidacy status, which is necessary before the school can be eligible to apply for full accreditation.

SPEAKER

Andrea Pettitt, PVCS Board Chair and Andrew Ross, Principal.

IMPACT

Idaho Code does not expressly provide for action due to failure to meet a pre-opening condition beyond delaying the school's initial opening. As PVCS is currently operational, delay is not applicable. PVCS's performance certificate will be considered for renewal in 2023.

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to I.C. §33-5209C(1), the IPCSC could direct staff to conduct additional oversight activities, as the third-party guidance has not been engaged as expected.

The IPCSC could consider non-renewal in 2023 on the grounds that the school failed to meet the terms of its performance certificate.

COMMISSION ACTION

Any action is at the discretion of the Commission.



May 26, 2021

To: Idaho Public Charter School Commission
304 N. 8th Street, Ste 242
Boise, ID 83702

Re: Pre-Opening Condition (Accreditation) with Peace Valley

AdvancED (now Cognia) completed a Report of Readiness for Accreditation in 2019 for Peace Valley Charter School (PVCS). This report can be found in the charter commission board materials. Since this report, PVCS has worked on each of the next steps required for accreditation candidacy outlined in the report.

PVCS is scheduled for their subsequent Readiness Review with Cognia at the beginning of 2021-2022 school year. At that time, PVCS will provide Cognia with an Action Plan to address the next steps outlined in the report for all three domains:

1. Leadership Capacity
2. Learning Capacity
3. Resource Capacity

Highlights to the ongoing work to these domains include:

- A comprehensive board policy manual that is reviewed and revised by the policy committee. This committee includes current board members and the school administrator.
- A sustainable financial plan indicated by an improved debt service coverage ratio, cash on hand, enrollment accuracy and stability, and other variables taking into account educational program and facility needs. Sustainable growth is at the center of this financial plan.
- Curriculum maps that provide alignment of Core Standards and Waldorf Curriculum.
- Resources, and training of resources, for faculty and staff to provide tiered instruction based upon multiple assessment criteria.
- Expanding assessments to include the Star (math and reading) criterion-referenced benchmark assessment.
- An intervention and assessment committee that reviews the tiered instructional model, proposes additional resources, and develops additional procedures to support the specialized needs of all learners. This committee is made up of faculty members of PVCS.
- New positions are reviewed to best allocate human resources to improve organizational effectiveness and sustainability. One major position that has been added following this review was the Pedagogical Coach. An additional position that is being considered starting in the 2021-2022 school year is the RTI Coordinator/Federal Programs Coordinator.



Once achieving accreditation candidacy, PVCS will continue to work with Cognia to take the necessary steps to receive full accreditation for our K-8 public Waldorf education school.

Together We Serve,

A handwritten signature in black ink that reads "Andrew Ross". The signature is written in a cursive, flowing style.

Andrew Ross,
School Administrator



Report of Readiness for Accreditation

Peace Valley Charter School

Andrew Ross, Executive Director

1845 S Federal Way

Boise, Idaho

Date of Readiness Review: May 22, 2019

AdvancED® is dedicated to advancing excellence in education worldwide. The North Central Association Commission on Accreditation and School Improvement (NCA CASI), the Northwest Accreditation Commission (NWAC) and the Southern Association of Colleges and Schools Council on Accreditation and School Improvement (SACS CASI) are accreditation divisions of AdvancED.

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Purpose

This report is designed to reflect the institution’s readiness for accreditation through a review of its Readiness Diagnostic and examining its practices in relation to the AdvancED Standards for Accreditation. By assessing the institution’s readiness, a determination can be made regarding its capacity to meet the AdvancED requirements for accreditation including a recommendation to grant candidacy status.

Name of Institution	Peace Valley Charter School
Telephone	208-205-8818
Head of Institution	Andrew Ross
Email contact	a.ross@boisewaldorf.org
Grades Served	K-6
Enrollment	260

Summary of Readiness Review

The Readiness Review for the Peace Valley Charter School took place on May 22, 2019. Dale Kleinert, AdvancED Pacific Regional Director and Christy Anderson, AdvancED Regional Analyst, met at the school with Andrew Ross, Executive Director, who conducted the school leadership presentation. The Readiness Review Team interviewed the director, a random selection of teachers, observed 6 classrooms for a minimum of 20 minutes each, and watched multiple school-wide transitions that included student outdoor time. Prior to the Readiness Review, the AdvancED Regional Director met on the phone and onsite with the school director to review the application and readiness process.

The Peace Valley Charter School is in its first year of operation and is located near several residential areas in the Boise Bench area, just south of downtown Boise. The school is situated on a major arterial and is highly visible to those who travel to and from downtown Boise.

The school currently serves grades K-6 and will add grade 7 in the fall of the 2019-20 school year. The physical site has a privately-located outdoor playground with playground equipment behind the main school building. The school director indicated that playground fencing is planned and additional classroom space near the playground is available as the school grows.

During the Readiness Review, the director provided an orientation to the school, its purpose and strengths, its challenges, opportunities and areas for improvement. It was obvious to the reviewers that all staff are passionate and highly-engaged in all aspects of the educational program. Even though students were in their last days of school prior to summer break, they were engaged in multiple types of academic activities.

Leadership Capacity Domain

Summary and Assessment of the Institution’s Analysis of Leadership Capacity

The school is authorized by the Idaho State Board of Education Public Charter Commission. The school also has a local governing board and an executive director. The local governing board has up to thirteen positions available. As of the Readiness Review, there were seven members, with one just recently appointed. The school experienced multiple changes in board membership and a change with the executive director during this first year of operations. The new executive director, who joined the leadership team in December of 2018, is passionate, invested, and understands the challenges and work that needs to be done to stabilize the school, and communicate the Board’s purpose and direction to all stakeholders. The director has partnered and receives support from a “Principal Mentor” appointed by the Idaho State Department of Education (1.9).

The director reported the board has had some training by the Idaho School Board Association, and the Idaho Public Charter Commission has provided direction and support. Overall board commitment to the school’s purpose and support for the Waldorf pedagogy is reported as strong; however, the board has focused on operational effectiveness (1.7), and has not yet adopted a comprehensive policy manual to support the school. (1.4) The governing board developed and documented goals to measure proficiency outcomes, and parent and staff satisfaction(1.10), but a continuous improvement process also has yet to be developed (1.3).

The school reports strong support from stakeholders. Founders come from a wide variety of backgrounds and are reported by the school to hold a passion for curriculum, principles, and successes of the mission and purpose of the school (1.1).

Teachers who were interviewed by the Readiness Review Team expressed frustration about the lack of direction and purpose of the governing board, especially related to stabilization of finances and immediate decisions related to the future of the school.

Based on the results of the institution’s Readiness Diagnostic and discussions during the review process, the following actions are recommended as next steps:

Next Steps	Check if Required for Candidacy
Develop and effectively communicate a strategic “Action Plan” focused on communicating the priorities of the immediate future of the school. The strategic Plan should include a time-bound calendar to develop and implement a comprehensive board policy manual, a sustainable financial plan, and an annual improvement and implementation plan that incorporates appropriate collaboration of all stakeholders.	✓

Learning Capacity Domain

Summary and Assessment of the Institution’s Analysis of Learning Capacity

The school is guided by the core Principals of Public Waldorf Education with the priority of addressing students’ academic, artistic and practical skills. The institution purpose (1.1) is committed to the Waldorf pedagogy, even though training has been limited for teachers who are tasked with using the model.

Six classrooms were observed for a minimum of twenty minutes each, with the exception of one grade level that was on a fieldtrip. Operational processes (1.7) are a strength, with students enjoying a daily routine in and out of the classroom that was organized and deliberately managed as observed by the reviewers. Classrooms, even on the last days of the school year were well-managed with instruction delivered appropriately throughout the building.

Teachers reported, and the reviewers observed, the Waldorf learning culture being integrated into the classroom with creativity, healthy movement, innovation and a homelike environment incorporated into the overall environment (2.2). Operational processes are in place for students to develop positive relationships with staff, and peer engagement with a strong relationship between play and learning experiences was observed by the Review Team (2.4).

Little alignment of Core Standards to the Waldorf model has taken place (2.6). In addition, a tiered instructional model is not formally adopted. Several teachers have begun a process to incorporate a Response to Intervention model (2.9) into the school’s instructional program, but without alignment to Core Standards, data collection using formative and summative literacy targets will be a challenge (2.10 & 2.11).

Based on the results of the institution’s Readiness Diagnostic and discussions during the review process, the following actions are recommended as next steps:

Next Steps	Check if Required for Candidacy
Develop a time-bound “Action Plan” to implement a process to ensure the curriculum is aligned to Core Standards (2.6) with learning progress targets in place to reliably assess and clearly communicate the alignment to appropriate stakeholders (2.10). This plan should include a Core Standards aligned tiered instructional model that identifies and supports the specialized needs of learners (2.9).	✓

Resource Capacity Domain

Summary and Assessment of the Institution’s Analysis of Resource Capacity

The Readiness Review Team observed passionate and invested leadership, teachers, support staff and students during the review. The school will retain all but two classroom teachers into their second year of operation. School leadership reported that they are trying to recruit more Waldorf certified teachers moving forward (3.4).

Leadership and teachers reported a natural professional learning structure, with teachers relying on each other to improve instruction and operational conditions (3.2) Teachers also reported, and leadership confirmed, that additional training in the Waldorf method will be necessary to sustain the model into the future (3.1). There are limited examples of public school Waldorf models to learn from, and trainings, time and cost for trainings will be a challenge for the school.

The school is challenged by financial issues (3.8). In December of 2018, the school faced a financial deficit of approximately \$180,000. In early spring, the school embarked on a fundraising project to raise \$40,000 to finish the fiscal year. The school is now projected to finish with an approximately \$30,000 carry-over to end the fiscal year.

Based on the results of the institution’s Readiness Diagnostic and discussions during the review process, the following actions are recommended as next steps:

Next Steps	Check if Required for Candidacy
As part of the Strategic Planning process, develop a documented and time-bound “Action Plan” to allocate human, material, and fiscal resources to improve organizational effectiveness and sustainability. (3.8)	✓

Assurances

Assurances	Yes	No
The institution currently meets the AdvancED Assurances.		X
The institution currently meets the Idaho Assurances.	x	

Next Steps (for any assurances with a response of “No”)	
Assurance #	Steps necessary to address for Candidacy
AdvancED #5	Develop and effectively communicate a Strategic Plan that includes an improvement and implementation plan to communicate the priorities of the immediate future of the school.

Conclusion and Recommendation

Based on the evidence, the Readiness Review Team makes the following recommendation:

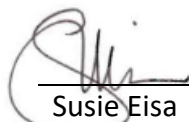
- Recommended as a Candidate for Accreditation
- Recommended to remain as an Applicant for Accreditation**

Next Steps – Required for Candidacy
Three main themes presented in this report must be planned and in motion prior to scheduling a subsequent Readiness Review. It is important to note that the themes are presented in the form of time-bound “Action Plans”. These “Action Plans” must be documented and in motion prior to hosting a subsequent Readiness Review that could result in candidacy. However, completion of the actions may take place over a longer period of time, during the period of candidacy.

Dale Kleinert
Regional Director, Pacific Region

June 20, 2019
Date

AdvancED Approval



Susie Eisa
Vice President, Engagement Services

June 27, 2019
Date

- Approved as a Candidate for Accreditation
- Approved to remain as an Applicant for Accreditation**

IV.A. NOTIFICATION OF FISCAL CONCERN PEACE VALLEY CHARTER SCHOOL

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)
IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the PCSC shall issue to the State Department of Education written notification of concern.

[Section VI.E, IPCSC Policy](#) was updated in August of 2020.

DISCUSSION

At the end of the 2019-2020 school year, Peace Valley Charter School's debt service coverage ratio was .33. A ratio of 1.1 is required to meet standard. This is likely due to an unfavorable facility lease agreement.

PVCS also has an FY21 enrollment variance of 81%. 95% meets standard on this measure.

Peace Valley is requesting that the notification be lifted and will be present (via Zoom) to share current year data.

SPEAKER

Andrea Pettitt, Board Chair, Andrew Ross, Principal, and Red Apple Financial.

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY22 on the regular schedule, with 75% of the annual projection issued by November 15th.

STAFF COMMENTS AND RECOMMENDATIONS

IPCSC staff recommends that the IPCSC maintain the notification of fiscal concern for Peace Valley Charter School for FY22.

COMMISSION ACTION

A motion to maintain the notification of fiscal concern for Peace Valley Charter School for FY22; OR

A motion to lift the notification of fiscal concern for Peace Valley Charter School, effective July 1, 2021.



May 26, 2021

Financial Watch Appeal

To be considered in the June 10th Commission Board Meeting

ATTE: Idaho Public Charter School Commission

Peace Valley Charter School would like to be considered for removal from Financial Watch.

Below are the financial metrics Peace Valley did not meet, found in the Idaho Performance Framework, and calculations forecasting Peace Valley Charter will have met each metric by the end of Fiscal Year 2021.

Enrollment Variance

Peace Valley Charter submitted an initial budget projecting an enrollment of 359. By February 2020, Peace Valley had enrolled over 340 students and has retained those students: a variance of 95%.

Debt Service Coverage Ratio

Net Income Available for Debt Service is projected to be \$383,274. Annual lease payment equals \$291,261. NIADS/DS = 1.18

Here are other financial metrics that will be met in FY21:

Current Ratio: 1.61 (FY21 Forecasted)

Days Cash on Hand: 60 Days (FY21 Forecasted, Positive trend from 37 days in FY 20)

Total Margin and 3 yr Aggregated Total Margin: Margin trends have been positive

Cash Flow Multi-year cash flow: Cash flow has been positive

Thank you for your consideration to remove Peace Valley Charter School from remaining on Financial Watch.

Sincerely,

Andrew Ross (School Administrator) and Red Apple Financial Team

IV.B. NOTIFICATION OF FISCAL CONCERN BINGHAM ACADEMY

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)
IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the PCSC shall issue to the State Department of Education written notification of concern.

[Section VI.E, IPCSC Policy](#) was updated in August of 2020.

DISCUSSION

Bingham Academy's FY19 year-end fund balance was negative by \$18,182. This has improved. The school's FY20 year-end fund balance was positive by \$206,428. The school's debt service coverage ratio was .5 in FY19 which did not meet IPCSC standards. This has also improved to 1.9, which did meet standard at the end of FY20.

In the current year, Bingham Academy maintained 94% of its July enrollment projection and 100% of its adjusted September enrollment projection. 95% meets standard.

IPCSC staff has corresponded with Bingham Academy's principal and business manager to assess the current year financial situation. The school expects that it will be able to meet all of the financial standards within the next few months, but as they currently have just below 30 days cash on hand (30 days meets standard), the school has decided not to request that the notification of fiscal concern be lifted at this time.

SPEAKER

No Guest Speaker.

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY22 on the regular schedule, with 75% of the annual revenue projection issued by November 15th.

STAFF COMMENTS AND RECOMMENDATIONS

IPCSC staff appreciates Bingham Academy's conservative approach and recommends that the IPCSC maintain the notification of fiscal concern for Bingham Academy for FY22.

COMMISSION ACTION

A motion to maintain the notification of fiscal concern for Bingham Academy for FY22; OR

A motion to lift the notification of fiscal concern for Bingham Academy, effective July 1, 2021.

IV.C. NOTIFICATION OF FISCAL CONCERN THE VILLAGE CHARTER SCHOOL

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)
IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the PCSC shall issue to the State Department of Education written notification of concern.

[Section VI.E, IPCSC Policy](#) was updated in August of 2020.

DISCUSSION

The Village Charter School has been engaged in renegotiating its facility debt structure since 2018. Technically, the school is in default of loan covenants, specifically those related to maintaining an enrollment minimum. While the bond holder has verbally stated its intent to not call the debt due, this agreement is not documented, leaving the school vulnerable.

The IPCSC chose to maintain TVCS's notification of fiscal concern in June of 2020 based on the same lack of documentation.

TVCS does not wish to contest maintenance of the notification of fiscal concern at this time. However, the school does want to provide an update to the IPCSC regarding their financial and operational progress.

SPEAKER

Josh Noteboom, TVCS Principal and Adam Holcomb, MAST Financial.

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY22 on the regular schedule, with 75% of the annual revenue projection issued by November 15th.

STAFF COMMENTS AND RECOMMENDATIONS

IPCSC staff recommends that the IPCSC maintain the notification of fiscal concern for The Village Charter School for FY22.

COMMISSION ACTION

A motion to maintain the notification of fiscal concern for The Village Charter School for FY22; OR

A motion to lift the notification of fiscal concern for The Village Charter School, effective July 1, 2021.

IV. D. NOTIFICATION OF FISCAL CONCERN MONTICELLO MONTESSORI CHARTER SCHOOL

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)

IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the IPCSC shall issue to the State Department of Education written notification of concern.

[Section VI.E, IPCSC Policy](#) was updated in August of 2020.

DISCUSSION

Monticello Montessori Charter School (MMCS) struggled with enrollment in the fall of 2020. In July, the school projected 256 students. By November, the school had enrolled approximately 200 students. The school's enrollment for the 2021-22 school year is not clear and, as of the date of these materials, the school has not held a budget hearing to establish an FY22 budget.

The school has two outstanding special education disputes that have exhausted resources for resolution outside of the court system. As these issues progress, legal fees for formal hearings will likely prove an additional financial burden on the school.

Through review of the school's financial reports and discussion with the State Department of Education, it is clear that MMCS has struggled with cash flow in FY21. The school appears to have used credit cards to manage cash flow issues throughout the year, incurring both interest and late fees on carried balances.

The school's newly appointed business manager has provided documentation that more than \$200,000 is available, but under previous administration, went unclaimed by the school. These funds are available for FY21 purchases through various federal funds administered by the State Department of Education. If these funds had been claimed earlier in the year, use of credit cards would likely have been unnecessary and the school would be in a position to meet IPCSC financial standards.

Most of the available money is provided on a reimbursement basis or otherwise requires documentation of allowable expenditures. Based on further discussion with the SDE's finance team and considering that receipts requested by the IPCSC on April 30th have not yet been produced, there is concern that the school may not be able to evidence the documentation required to claim the outstanding funds.

MMCS's governing board has been actively engaged in resolving the operational issues. The school's new Business Manager is experienced and capable. It does seem likely that the school can get back on track, though it may take some time to sort out the organizational transition.

SPEAKER

MMCS representative.

IMPACT

If the IPCSC issues a new notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's base support for the whole of FY22.

If the IPCSC does not issue a notification of fiscal concern, no notification will be made and the school will receive its revenue on the regular schedule for FY22.

STAFF COMMENTS AND RECOMMENDATIONS

The IPCSC staff appreciate the cooperation from MMCS's administration, staff, and board of directors in getting the school back on track operationally. However, the financial situation could pose a risk to taxpayer dollars should the school not remain financially viable for the remainder of its performance certificate term.

Currently, IPCSC staff recommends issuing a notification of fiscal concern for MMCS.

COMMISSION ACTION

A motion to issue a notification of fiscal concern for Monticello Montessori Charter School for fiscal year 2022; OR

No action.

V. CONSIDERATION OF NEW CHARTER SCHOOL PETITION KOOTENAI CLASSICAL ACADEMY

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Code § 33-5205
IDAPA 08.02.04

BACKGROUND

Kootenai Classical Academy is a proposed new charter school in northern Idaho. The school intends to deliver a classical model, supported by Hillsdale College. The school is seeking to open in the fall of 2022 and intends to serve 702 students in grades K-12 at capacity. In its first year, the school will serve 428 students in grades K-8. The school intends to build a new facility.

DISCUSSION

Please see the Petition Evaluation Report for details regarding PCSC staff's evaluation of the petition. Potentially impacted school districts and charter schools were notified of the hearing. Written comment from two schools is included in these meeting materials.

SPEAKER

Terrence Moore, Ph.D., Prospective Principal and Edward Kaitz, Ph.D., Board Chair.

IMPACT

If the IPCSC approves the petition, the IPCSC and KCA will have seventy-five (75) days to execute a performance certificate.

If the IPCSC denies the petition, the denial decision will be delivered to KCA in writing. In such a case, KCA could appeal the decision to the State Board of Education.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the IPCSC either deny or conditionally approve the new charter school petition for Kootenai Classical Academy.

COMMISSION ACTION

- A. A motion to deny the Kootenai Classical Academy new charter school petition on the following grounds: the Leadership and Management section of the petition is incomplete and/or the Facility and Finance section does not meet standard II.1.b with regard to the facility plan and/or KCA's current affiliation with an Education Services Provider (Hillsdale College via the Barney Charter School Initiative) is not allowable under Idaho Code; OR

- B. A motion to approve the Kootenai Classical Academy new charter school petition with the following conditions:
1. petitioners evidence secured grants or loans, facility lease, and accepted enrollment numbers sufficient to execute the facility plan as presented in the petition by May 27th, 2022; AND
 2. One of the following
 - a. The petitioners complete the Leadership and Management section of the petition to a “meets standard” level within thirty (30) days of approval, evidencing that the intended Education Services Provider (whether Hillsdale College via the Barney Charter School Initiative or another Education Services Provider) is allowable under Idaho Code; OR
 - b. The petitioners evidence that the program will be implemented without an Education Services Provider within thirty (30) days of approval; OR
- C. A motion to approve the Kootenai Classical Academy new charter school petition as presented.



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

PETITION EVALUATION REPORT



Re: Kootenai Classical Academy Inc.
Report Issued May 26, 2021

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

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

Alan Reed, Chairman
Jenn Thompson, Director

Petition Review Summary

Kootenai Classical Academy (KCA) intends to provide an American Classical education to up to 702 K-12 students in north Idaho beginning in the Fall of 2022, with a first-year enrollment of 428 students in grades K-8. The curriculum is well-designed and based upon an existing model that has proven academically and operationally successful across the country, focusing on the “classics” and incorporating traditional values into the academics. The school intends to enroll K-8 in its first year and grow through K-12 over time. While this model generally focuses on grades K-8, the petitioners have a plan in place to educate students in grades 9-12.

The school leader identified in the petition has experience implementing this model in other states, and has contributed to the overall growth and development of the proposed educational model supported by Hillsdale College and the Barney Charter School Initiative (BCSI).

There is significant concern that the school is affiliated with a sectarian institution, that evidence of financial stability and secured funding is not provided, a facility location is not secured, and the school is working with an Educational Services Provider (ESP) without providing the required information, which makes the petition incomplete.

The petition does not currently meet the following standards of the Public Charter School Commission’s (IPCSC) [Petition Evaluation Report and Standards of Quality](#):

- Standard II.1.a
- Standard II.1.b
- Standard V.3

Based upon IPCSC staff’s review of the petition, staff recommend that the Commission either:

- a) deny the petition on the grounds that the education services provider information is incomplete, the petition does not meet several established standards of quality in the financial section, and the school’s affiliation with Hillsdale College via the Barney Charter School Initiative appears to be in violation of Idaho Code; OR
- b) that the Commission conditionally approve the petition with conditions related to reconciliation of these issues.

Summary of Section Ratings

Section 1: Educational Program ↓

MEETS STANDARD

Section 2: Financial & Facilities Plan ↓

DOES NOT MEET STANDARD

Section 3: Board Capacity and Governance Structure ↓

MEETS STANDARD

Section 4: Student Demand & Primary Attendance Area ↓

MEETS STANDARD

Section 5: School Leadership and Management ↓

DOES NOT MEET STANDARD

Section 6: Virtual Schools ↓

NOT APPLICABLE

Section I: Educational Program

MEETS STANDARD

Comments

Kootenai Classical Academy will implement an academic model developed and supported by Hillsdale College, as part of the Barney Charter School Initiative. The school intends to provide students in grades K-12 with an American classical education, and leans heavily on a classical, content-rich approach to liberal arts and sciences.

The school also intends to incorporate principles of moral character and civic virtue amongst students. The school will do this by adhering to a vision of traditional, liberal education and a firm set of core virtues.

The school will have access to well-developed training for teachers, and overall support from the Hillsdale network of schools.

Strengths

- Curriculum is largely established and is financially advantageous due to the relationship with Hillsdale College.
- The program uses established curricula such as the Core Knowledge sequence and Singapore Math. These instructional programs are accompanied by significant professional development for teachers and are philosophically aligned to the school's mission through spiraling instruction and ample formative assessment.
- The intended school principal has played an instrumental role in the development of this model for many years and has written academic articles that the school uses as sources of its educational philosophy. Please see resume on page 157.
- The school presents attainable and measurable goals as part of its educational philosophy.

Concerns

No Significant Concerns

Section II: Financial and Facilities Plan

DOES NOT MEET STANDARD

Comments

The petitioners have identified two separate locations near Post Falls, Idaho, and intend to partner with Round Table, Bouma, Inc., and Building Hope in order to provide funding to acquire land and build a facility in the area.

The budget presented indicates that the school requires several grants and loans in order to succeed financially. Documentation of the status of grants and loans included in the budget is required.

Strengths

- The budget is clear and easy to read.
- Petitioners are in the process of negotiations with facility option 1.
- The petitioners are engaged with several companies that have a track record of success working with Idaho charter schools.

Concerns

- The draft contract for back office services is not signed by the grantee (Terrence Moore).
- The budget shows that Round Table Funding is providing financing (page 84). There is no draft contract with Round Table or other indication that Round Table is actively engaged in the project included in the petition.
- Documentation provided in the petition dated April 28th, 2021 (pages 205-206) shows that KCA has only recently reached out to Building Hope to request \$5,000,000 in funding for the facility project. The petition does not include evidence that Building Hope has agreed to provide the requested funding
- The request for funding also indicates that KCA is “working to delay any possible pre-construction costs until permanent financing is secured”, indicating that financing for the full scope of the project has not yet been realized.
- This petition was initially submitted in December, 2020 with a proposed facility located in Hayden. The initial petition was withdrawn. The petition was subsequently resubmitted in March 2021, with a proposed facility location in Hauser. As of the May 11th final submission, the proposed facility is to be located in Post Falls. Inconsistency in the proposed facility

location raises concerns about the viability of the facility project in the current real estate market.

- It is not clear whether Round Table, Bouma, Building Hope or Kootenai Classical Academy is carrying the proposed loan for the facility. The school's budget indicates that KCA will be carrying a \$9,400,000 facility loan beginning in the pre-operational year. No documentation that the school has been able to secure such a loan is included in the petition. The facility option template indicates that the risk will be taken by Round Table (35%) and Building Hope (65% subordinate).
- As converting interest into enrollment has proven difficult for other charter schools, and this petition is dependent upon recruiting 428 students in order to meet its intended financial obligations, this raises concerns about whether the school will be financially viable.
- In addition to the facility concerns, there are several other budget line items that are unclear, including \$25,000 for miscellaneous expenses, as some of the items listed in the explanation of miscellaneous expenses have their own individual line item (e.g., Powerschool, SchoolMint, etc.).
- The recruitment plan shows \$13,500 for advertising/promo, and \$7,500 for staff recruitment. The numbers for advertising/promo increase year over year, even though the recruitment in year one will be for several hundred more students than in any future year. The recruitment plan described in the petition does not appear to justify the high dollar amount.

Section III: Board Capacity and Governance Structure

MEETS STANDARD

Comments

The board for Kootenai Classical Academy is comprised of two college professors (Philosophy and Economics; Business); a pilot and strategic development professional; an accountant; a human resource specialist; a machinist; and a home educator.

The petitioning group also includes founding members that are not board directors. These members provide additional skillsets intended to complement the board in the petitioning/recruiting process.

A summary of the board governance capacity interview is included in this report.

Strengths

- The board is made up of a diverse group of members with different backgrounds.
- Board directors are passionate about the model and engaged in training and learning.

Concerns

No Significant Concerns

Governance Capacity Interview Summary

Interview Date: May 3rd, 2021

Present: Ed Kaitz, Rachel Kaitz, Renee Burgess, Marcel LeBlanc, Kirsten LeBlanc, Robbie Miles

Not Present: Michael Burgess, Ben Kettle

IPCSC Staff Present: Jenn Thompson, Jared Dawson, Mel Rivera

Personal introductions – Please take a moment to introduce yourself and tell why you chose to serve on this board:

- **Ed Kaitz** – board chair, helped assemble group, background in education, 30 years teaching, 2 daughters that attend Hillsdale college, crusader for classics, passionate believer in educational model
- **Rachel Kaitz** – college educator, taught internationally/in States, tremendous need
- **Renee Burgess** – accounting finance background, close to 20 years as business manager for private classical school, how transforms students
- Michael Burgess – (via Renee) local politics, serve constituents as best as possible, machinist
- **Marcel LeBlanc** – engineer, Navy, leadership and management experience
- **Kirsten LeBlanc** – teacher, enjoys classical model, can help children with special needs, phonics, etc., one will be attending Hillsdale in the fall
- **Ben Kettle** – (via Ed) former student of Ed's, accounting, with Renee and Michael on finance committee
- **Robbie Miles** – came on in early April, grew up in North Idaho, Post Falls area, former CCA teacher

1. What do you feel are the defining characteristics of a successful public charter school?

Board directors stated that a successful charter school fulfills a mission, provide academics and good character to students. They also stated that it is important to add a character component to education. The board has a great interest in serving special needs and at-risk students, and board directors expressed that there is no better mission than providing a Hillsdale model education to the community.

Board directors also stated that a successful charter school serves an underserved population in the community, and the ability to serve those students is a measure of a school's success in its community. Board Directors also noted that while they really enjoy Coeur d'Alene Academy's rigor, they view that school as a college prep model, not a classical model. Directors stated that first-year students at North Idaho College (NIC) often don't have the necessary background to be well-prepared for college, and a classical education should prepare them to go out into the world and be contributing members of society.

Board Directors feel strongly that the model serves all students well and make available a good education to families who may not have an opportunity to seek out this education otherwise.

Board directors will not experience personal benefit from the opening of this school, as all of their kids are too old to participate, but they believe in the model.

2. What training have you sought out? What training would you like to pursue in the future?

The board has engaged in great board training through Hillsdale College. Board directors stated that they intend to engage in trainings efficiently and effectively, with more training on a regular basis. Hillsdale brought in legal training, a CFO for budgets, strategic planning, and brought in a star principal from a Cleveland school to discuss charter school issues. Additionally, Hillsdale brought in the head of BCSI, and participants observed a marketing presentation. Separately, Board directors participated in a BLUUM-sponsored training, and the board plans to take advantage of Idaho training. All board directors will be required to attend training sessions based on the school's bylaws.

3. How did you come together as a board? How did you decide on the Principal, school model, etc.?

Dr. Ed Kaitz uses the Socratic Method while teaching, discussing how ideas and concepts changed the world. He sees a lot of kids come to college unprepared, and due to this has tapped into Hillsdale and Dr. Moore for years, following Dr. Moore's writings and books. Dr. Kaitz reached out to Hillsdale College as his daughters wanted to go there. Hillsdale put him in touch with Stephen Lambert at TVCA.

Renee met Rachel at Lewis-Clark State College, where they discussed the model, etc., Marcel/Kirsten, may want to start a school up in Boundary/Bonner county at a later date.

Robby was Kaitz's children's favorite teacher at CCA, and Dr. Kaitz reached out to him to join the board.

4. The petition shows a logo with a flower that states "Hillsdale Families." Do any of you have a prior connection to Hillsdale College or the Barney Charter School Initiative?

Most board directors have children going/gone to Hillsdale College, which provided inspiration for the design.

5. Please tell us about the proposed facility location and why it was chosen.

Board Director's noted that Post Falls is the number one real estate market in the country, and that the area is experiencing significant growth. Board Director's stated that they identified Post Falls as a good location for a public charter school, since the area is expected to double in size in the next ten years.

6. Please tell us about the board policy for handling complaints and grievances.

Board directors stated that all issues are expected to be managed at the most direct level possible and escalated to the Vice Principal/Principal first. If the problem cannot be addressed in that way, then board will address complaints. The board does not want to be involved unless needed to address an issue. The board intends to work with Steve Lambert to review the policies used at Treasure Valley Classical Academy.

Section IV: Student Demand and Primary Attendance Area

MEETS STANDARD

Comments

The petitioners propose to build a facility in Post Falls, Idaho, with a primary attendance area comprised of the Post Falls, Coeur d'Alene, Lakeland and Kootenai school districts. The petition includes two potential facility options, and expects to primarily recruit students from local private, charter and home schools.

Strengths

- The petition has identified many prospective parents, primarily in the Post Falls/Coeur d'Alene area (Appendix F.3 List of Interested Families, p. 172).
- The petition provides a map of intended bus routes.
- The facility location is close to a concentrated population area that correlates with the location of families on the interest list.

Concerns

- The similarities between KCA's program and other charter schools in the area raise concerns that existing high-performing charter schools will be negatively impacted if KCA is approved. Please see attached letters from local charter schools in regard to this concern. Additional evidence provided by the school appears to be inconsistent.
- While North Idaho is clearly experiencing a boom in growth, it appears to be primarily high-end homes available on the market. This raises concerns about whether affordable housing is accessible for teachers and parents with young families (a [recent article](#) by KREM2 states that the median house price in Coeur d'Alene is \$495,000, citing data from Realtor.com).
- The school has requested an increase in growth from 325 to 428 (page 45). The increase in student enrollment is intended to be in grades 6-8, which is traditionally harder for charter schools to achieve.

Section V: School Leadership and Management

DOES NOT MEET STANDARD

Comments

The school leader has extensive experience developing and implementing the proposed model in other states, and has an extensive history working for Hillsdale College and developing the Barney Charter School Initiative, which provides the curriculum and training.

This section does not meet standard due to the incomplete education services provider section.

Strengths

- The school leader is well-versed in the proposed educational model and curriculum, and has a clear vision for how the school will be managed.
- The Board has a clear and thorough evaluation tool for the Principal.
- Job descriptions are thorough.

Concerns

- KCA's affiliation with a religious institution does not appear to be authorized under Idaho Code. Specifically, I.C. §33-5206(1) states that "a public charter school shall be nonsectarian in its programs, affiliations..." Hillsdale College describes itself as a 'non-sectarian Christian institution.' The Barney Charter School Initiative (BCSI) is a program of Hillsdale College. KCA is listed as a Hillsdale College [affiliate school](#) on the BSCI page of Hillsdale College's website.
- As BCSI appears to be acting as an educational services provider, it is unclear whether the school could implement this model if severing the affiliation with BCSI is necessary.
- The Educational Services Provider section of the petition is incomplete. This section of the petition is required based upon the following:
 - Idaho statute §33-5202A(4) defines an educational services provider as a "nonprofit or for-profit entity that contracts with a public charter school to provide educational services and resources including administrative support and educational design,

- implementation or management.”
- The petition includes a signed contract for educational services between KCA and the Barney Charter School Initiative (BCSI) on pages 189-197. This document identifies that BCSI provides the following educational services:
 - Educational Resources: Access to licensed training materials (includes “certain materials and curricula for classical charter school education grades K-12...a program guide for each grade K-12”);
 - Implementation Support: Assistance with creation of bylaws, IRS forms and application for charter status to state authorizer;
 - Administrative Support: Interviewing and providing recommendations for head of school candidates;
 - Educational Resources: License to access licensed works (e.g., training materials).

 - Educational Design Services: The petition also notes that “Kootenai Classical Academy will collaborate with Hillsdale College’s Barney Charter School Initiative (BCSI) in design and execution of the educational program” (page 12).

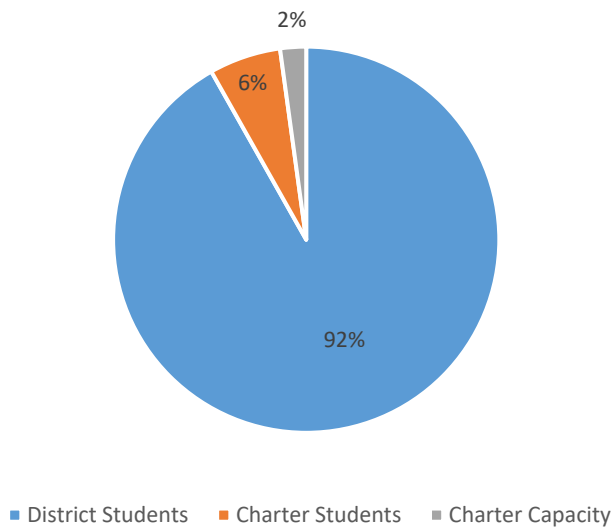
 - Management Services: The school’s bylaws state that should the school make any amendments to its bylaws or articles of incorporation, BCSI must be notified (page 130).

Section VI: Virtual Schools

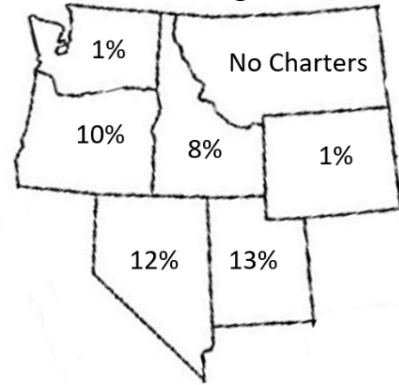
NOT APPLICABLE

Yield Rate and Portfolio Composition Kootenai Classical Academy Amendment

Yield Rate Coeur d'Alene/Post Falls/Lakeland
Full-Term ADA July 2020



Yield Rate Idaho & Surrounding States

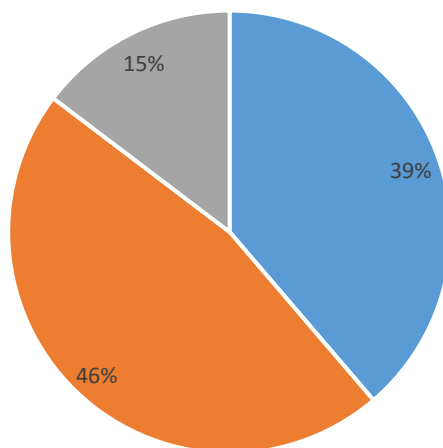


National Yield Rate: 7% excluding Washington D.C.; 8% including.

3 Largest Yield Rates: Washington D.C. 52%; Arizona 26%; Florida 16%

National Alliance for Public Charter Schools (2021). "Measuring up to the Model: A Ranking of State Public Charter School Laws"

Coeur d'Alene/Post Falls/Lakeland Area Charter Model
Diversity
Full-Term ADA July 2020



- NiSTEM - STEM
- Coeur d'Alene Charter Academy - Postsecondary Prep
- Kootenai Bridge Academy - Virtual
- Hayden Canyon Charter - Expeditionary Learning



AFFILIATE CLASSICAL CHARTER SCHOOLS





COEUR D'ALENE CHARTER ACADEMY

4904 N. Duncan Drive • Coeur d'Alene, Idaho 83815-8312
(208) 676-1667 • FAX (208) 676-8667
www.cdacharter.org • info@cdacharter.org

May 6, 2021

Idaho Public Charter School Commission

Commissioners and Staff:

I write in response to your solicitation of input on the proposed opening of Kootenai Classical Academy in the fall of 2022.

As you know, my school, the Coeur d'Alene Charter Academy is perennially one of the highest-performing schools in the state. Our curriculum and our mission are geared toward producing graduates who perform at a high level on tests and thrive in a college setting. We and our students have been very successful.

Our model is not innovative. It is essentially a classical model that focuses on great literature, respectful debate of ideas, and advanced studies in math, science, and foreign language. In addition, we require all students to take classes in civics and Latin. Compare this to the mission statement of the proposed KCA: "...a classical, content-rich education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue..." In my opinion, this school targets the exact market segment that we serve, and has potential to divide that market to the detriment of all.

What you may not know is that our waiting lists have evaporated in recent years as the result of several new "schools of choice" in our area—several charter schools and magnet schools have opened in recent years, resulting in a more diverse and competitive education market. It is important for you to know that we have been extremely generous with our time and our knowledge, and have aided every one of the new charter schools as they worked to open their doors. Significantly, this includes our work with North Idaho STEM—a school designed for the same motivated, academic-minded students that make up our student body. That is to say, we believe in the value of competition; we welcome it.

However, because KCA's model is nearly identical to ours, I believe that their opening will cause a significant drop in our enrollment—making it difficult for us to continue to deliver the outstanding education that has defined us over the years. Despite the fact that our community is seeing growth, the number of people looking for a classical education does not seem to be growing along with it. In other words, it is difficult to believe that there is a need for another school of this model in this community.

Were this a school for the arts, or a tech school, or perhaps a language immersion school that would draw equally from all existing schools, I would offer my endorsement and assistance. But I could not get behind another STEM school (which would hurt our excellent NI STEM Academy) nor an expeditionary school (which would compete directly with our newly-founded Hayden Canyon Charter.) New charter schools are supposed to offer alternatives to existing models, so that kids and parents have meaningful choice. This proposed school will take directly, and almost exclusively, from our market segment, and does not represent a meaningful new choice.

As it is the responsibility of the Commission to support quality charter schools, I believe it would be counterproductive for you to approve the opening of Kootenai Classical Academy. To do so would almost certainly cause harm to one of the most successful schools—charter or other—in the state.

Thank you for your consideration, and for the opportunity to share my thoughts.

Sincerely,

Daniel P. Nicklay
Principal

May 29, 2021

To: Idaho Public Charter School Commissioners and Staff,

In response to the May 6, 2021 letter from Coeur d'Alene Charter Academy concerning Kootenai Classical Academy's charter petition and its perceived potential to harm other schools in Kootenai County if the charter is approved, we respectfully disagree.

As the commission is aware, CDA Charter is regularly one of the highest performing schools in the state. The presence of Kootenai Classical Academy (KCA) will not change the incredible work and performance of the students, teachers, and staff at CDA Charter. CDA Charter and KCA have two separate missions and serve different key populations. Just as neighboring Spokane has demand for both Gonzaga Preparatory School and the classical Chesterton Academy, Kootenai County has demand for both college prep and classical charter schools.

Kootenai Classical Academy Board Director Robby Miles was a social studies teacher at CDA Charter for seven years. He left on good terms in 2019 to start his own business. Mr. Miles has sent two of his children to CDA Charter, one of whom still attends there. With this experience, Mr. Miles has an understanding not only of the mission of CDA Charter, but the curriculum model and school culture. In his words, "I fully support the content rich challenging college prep mission of the CDA Charter Academy as a teacher and as a parent, but *its mission is fundamentally different* from the mission of Kootenai Classical Academy which is to teach timeless truths and prepare the minds and hearts of young people to be moral and virtuous citizens in their community."

CDA Charter's mission revolves around college prep, academic rigor, and high stakes PSAT, SAT, ACT, and AP testing for "those willing to accept the challenge." This is a very specific segment of the population; CDA Charter is not designed to be a school for everyone. All 6th - 12th grade North Idaho students have the opportunity to be admitted, however, not every student is up to the challenge CDA Charter provides.

KCA on the other hand is a fully classical education focused on studying timeless truths. The classical curriculum of great books, primary sources, and time-tested teaching strategies is scaffolded throughout a student's entire education, building on itself year-after-year, to help students discern truth and wrestle with timeless human questions. It emphasizes developing holistic virtues, while focusing on citizenship and service, with an integrated curriculum from K-12. As students study an area of history, literature, or philosophical concepts, for example, they study that area across the curriculum in all of their subjects. This not only increases each student's depth of knowledge, it develops broader knowledge supporting our mission of holistic

education and virtue. Preparing students for college is important, as it should be at all schools, but that is not the primary goal of a classical education.

Though CDA Charter's letter stated that it "is essentially a classical model," they fall short of a true classical education. They may teach great literature, emphasize debate of ideas, and teach in-depth knowledge in various subjects, but there is no unifying mission beyond providing rigor and preparing students to succeed at college. State standards, AP tests, and teacher discretion drive what is taught in the classroom. According to their own charter petition, they hire highly qualified master teachers and encourage them to teach their own curriculum in the classroom. There is little if any integration across the curriculum and no scaffolding year-after-year.

CDA Charter's claim that waiting lists have "evaporated in recent years as the result of new 'schools of choice' in our area," stretches the imagination. New charter and magnet schools in the area likely pull from different demographics than those who are attracted to CDA Charter's college prep model. As the community continues to grow, CDA Charter and KCA should see their school populations and waiting lists grow at the same rate.

CDA Charter experienced declines in waiting list numbers before the opening of other area charter schools, prior to KCA filing its charter petition. During Mr. Miles' tenure as a teacher at CDA Charter, he observed multiple factors that influenced the declines in waiting list and student population numbers, including:

- Many parents in the community see CDA Charter as a safe option for middle school; after middle school they transfer their students to a traditional public high school where they can earn higher GPAs with less work.
- Though CDA Charter has several strong sports programs, many students leave to pursue the greater diversity of sports at other schools.
- Due to the intense nature of the college prep curriculum, many parents and students find the homework load to be too much and realize that work-life balance is an important part of the teenage years.
- As college has become increasingly expensive, many families are considering different career paths or attending traditional public schools and Dual Credit programs that focus on technical and career readiness.

CDA Charter serves its ideal student demographics well, however there is a need to serve other populations within our community. In particular, Kootenai County has a need for a classical charter school with a curriculum that has a proven record of success in the crucial elementary grades. Multiple studies have shown the importance of mastering reading by the end of third grade; the Core Knowledge sequence which is the basis of Kootenai Classical Academy's curriculum in the younger grades has a proven record of enabling students to excel in this area.

The KCA Charter petition shows the desire within the community for a classical alternative to the currently available schools. When surveyed, over 70% of prospective KCA students were not enrolled in a public school with 37% of respondents being homeschooled. As students enrolled at the elementary levels age, they may opt to attend CDA Charter for its college prep model. KCA's classical model will provide an additional competent pool of students for CDA Charter's programs.

KCA also has specific outreach programs in place to encourage low-income students to attend. This segment of the population does not currently have many options within reach for pursuing classical education. Outreach programs include: working with the Post Falls Food Bank, developing a free and reduced lunch program, the availability of bus transportation (not offered by other area charters), and Spanish-speaking outreach.

State school reports show that area charter schools do not serve these populations to the same degree as traditional public schools. This leads some in the community to see charter schools as elitist, non-equitable, or only for those who can afford to drive their kids to school and purchase lunch. These schools can seem out of reach for the populations that need them most. Parents with special needs students also feel underserved by the current school choices.

KCA is projected to serve special education students at similar rates as the traditional public schools, 7-10% of the student population. CDA Charter's 2018 report shows that 1-2% of their student population qualifies as special needs students. CDA Charter fulfills the law when serving these students, however many families with special needs students feel as though they are not able to accept the challenge of CDA Charter and have left the school. This is one key differentiator in having a meaningful alternative school choice in our area.

Mr. Nicklay stated in his letter, "New charter schools are supposed to offer alternatives to existing models, so that kids and parents have meaningful choice." It is our contention that KCA offers a true alternative and meaningful choice as a school with a fundamentally different mission. We are dedicated to a true classical curriculum, not focused solely on college prep and test scores, but truth, justice, beauty, virtue, civic duty, and serving underrepresented or absent populations within the community.

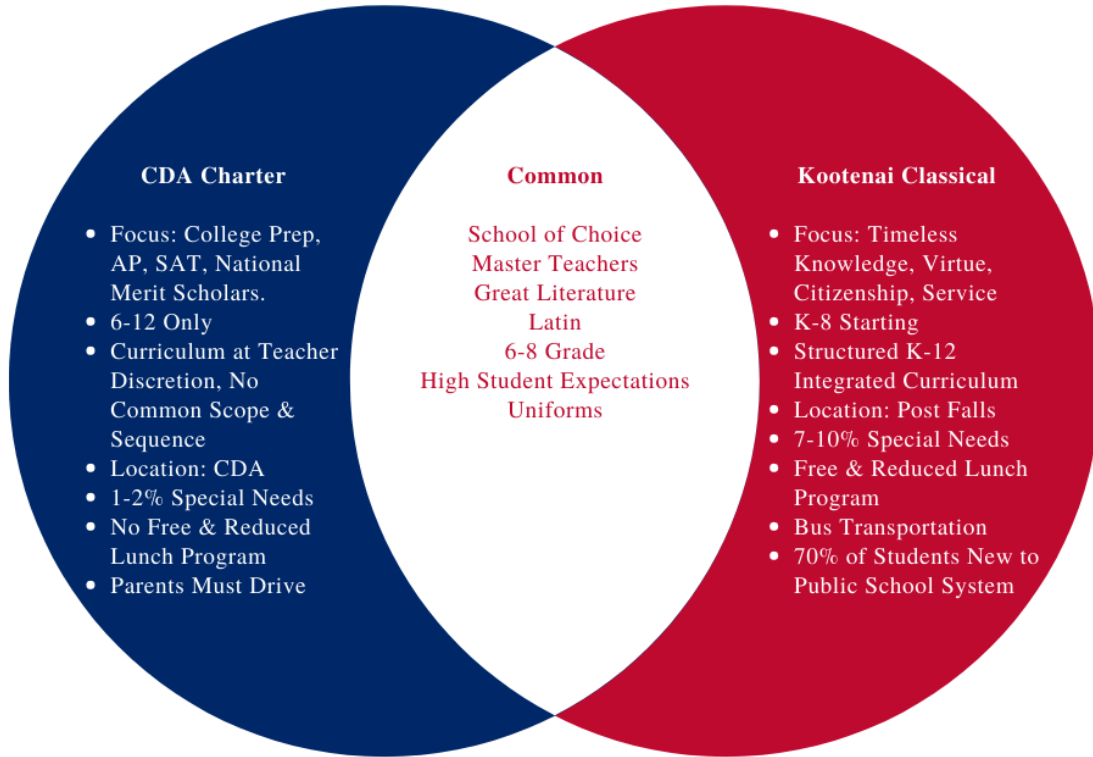
Thank you for your consideration of our petition and the chance to share our response.

Sincerely,

Kootenai Classical Academy Board of Directors

Enclosure: Appendix A - Compare & Contrast Infographic

Appendix A - Compare & Contrast Infographic





PO Box 434
Rathdrum, ID 83858-5129
Office (208) 687-8002; Fax (208) 687-6167
stemcharter.org

May 6, 2021

Idaho Public Charter School Commission

Dear Commissioners and Staff:

In response to the proposed opening of Kootenai Classical Academy in the fall of 2022.

While I am an advocate for school choice, I strongly question the wisdom, and even the thought process that would put a school with an almost identical model in such a small market. KCA looks to be the same model as CDA Charter Academy.

Should we put another STEM school in Kootenai county? (STEM Charter Academy) Another Expeditionary school (Hayden Canyon), another credit recovery model (Kootenai Bridge). Managing your portfolio of schools should be like your stock portfolio, well balanced and not too much capital placed in the same areas. Putting KCA in Kootenai county adds unnecessary risk to the health of your portfolio.

One of the roles of the commission is to ensure healthy schools, operationally, academically, and financially. I can assure you that opening a school with this mission, in this area, will hurt at least 3 schools financially. STEM Charter Academy, CDA Charter, and KCA itself. As soon as finances get hurt, the quality of instructors that we have to compete for will diminish along with the academics. This is a bad idea.

Again, I am in favor of choice, but we have had a charter school and several magnet schools open in the last couple years. Let's focus on quality as well as quantity. There needs to be responsible growth and placement or the whole movement will be hurt. While this is not anyone's intent, it will be the result.

I hope you will give these points serious consideration in this decision as well as future decisions.

Please contact me with any questions and thank you for your consideration.

Scott Thomson
Executive Director
STEM Charter Academy
208-687-8002

May 30, 2021

Idaho Public Charter School Commission

Dear Commission and Staff:

The board of directors at Kootenai Classical Academy would like to take the opportunity to respond to a recent letter from STEM Charter Academy principal, Scott Thomson. Mr. Thomson's letter is clearly designed to help convince the charter commission to deny our charter request on June 10. In his letter Mr. Thomson makes numerous claims in defense of his position, and asks the commission to give his points "serious consideration in this decision as well as future decisions."

What's unfortunate however is that the letter provides no evidence to back up its claims of potential harm to existing Kootenai County charter schools. Mr. Thomson alleges that Kootenai Classical Academy (KCA) and CDA Charter Academy have "almost identical" educational models – we "look to be the same." However, no research or documentation is provided to demonstrate that this claim is accurate. A thorough examination of Kootenai Classical Academy's charter petition will show that KCA and CDA Charter Academy could not be more different in very deep, significant ways:

First, for KCA, the K-12 "spiraling" type of classical education is essential to our mission. One of the reasons students learn cursive in the lower grades is to help them build connections between otherwise disparate letters so that they can be open to understanding the remarkable connections and parallel scaffolding inherent among seemingly disparate subjects like science, history, math, music, art, literature, philosophy, and music. One of the remarkable byproducts of learning cursive is the beneficial effect it has on students with dyslexia.

CDA Charter Academy does not have a K-5 component, nor does it plan to offer these grades anytime in the future. What KCA can do however to fill this gap is to provide happy, healthy, curious, and academically prepared students to CDA Charter Academy at the sixth grade level if these students and their families choose to take the college prep route through middle and high school.

Second, equally important to our academic mission is our dedication to cultivating the moral virtues in our students. Aristotle argued that a fully flourishing human being is someone who cultivates both the moral and intellectual virtues, and KCA students will reflect on and demonstrate the moral virtues from the earliest grades. Aristotle famously said that "with friendship, there is no need of justice." In other words, laws and "disciplinary policies" are much less needed in a society where human beings learn the humanities in order to be, in the words of Dr. Terrence Moore, KCA's founding principal, "more humane."

In reading CDA Charter Academy's charter petition it seems clear that the "character" component in the educational mission is valued as a means to attain competitive success, rather than a worthwhile and comprehensive end in itself. This is by no means a surprise at a college prep school, but it does distinguish CDA Charter Academy from KCA in very dramatic ways. For example, the CDA Charter Academy's petition asks an important question: "What will it take for a student to be successful at Coeur d'Alene Charter Academy?" The following contain very revealing portions of their answer:

"Diligence, perseverance, a refusal to quit, the desire to succeed, and an understanding of the necessity and dignity of labor are all qualities of a highly developed work ethic."

The various virtues mentioned in the CDA Charter Academy petition, while extremely important, are all fashioned to the end of establishing a "work ethic" which does not appear

unusual at all at a college prep institution. KCA's core virtues definitely include perseverance, but also highlight most importantly the virtues of courage, courtesy, honesty, self-government, and service. For Aristotle, courage and self-government are the leading virtues, followed by generosity (service) honesty, and friendship among others. In other words, courage and self-control pave the way for the more social virtues that follow. KCA is interested in cultivating humanity as much as a "desire to succeed."

"Because of this, excessive hours spent in part-time jobs or play restricts the time at students' disposal leaving them at a competitive disadvantage with their peers nationwide."

KCA, again, believes that part-time jobs, "play" and, more importantly, family time are important parts of a student's overall moral development, and provide rich environments in which to practice the moral virtues.

"We happen to believe that the first business of a student is learning. Students who see their personal academic preparation as a full-time occupation gain a distinct advantage over those with whom they compete. Coeur d'Alene Charter Academy will develop students by increasing their capacity for work through a demanding curriculum that lays the foundation for future educational and professional success."

The record shows that students at other BCSI affiliated schools can "compete" with the best students across the country in terms of their academic preparation if they choose to go to college. However, Kootenai Classical Academy does not intend to be a college prep school; our mission is not about students gaining a "distinct advantage" over others but simply about cultivating happy, productive, kind, curious, and enthusiastic young adults who are well-prepared to face their next set of challenges in life in whatever field they choose – college or no college.

Third, as a college prep school, CDA Charter Academy is heavily focused on standardized tests. According to our founding principal, Dr. Terrence Moore, this kind of educational "data" falls well "short of our ultimate mark." In other words, CDA Charter Academy's academic focus in this area could not be more different than KCA's. KCA's educational model is second to none, and according to Dr. Moore:

"We know that a school that upholds learning to such a high degree will have a high percentage of graduates going to selective colleges, and then a disproportionate number of those going to graduate school and into demanding professions such as medicine, law, military service, teaching, and their own start-up companies. Yet a large part of our teaching aims at turning young hearts towards service to, and understanding of, their fellow human beings. The medical doctor who looks at his or her patients in the eye and talks to them about their health rather than simply filling data into a program; the teacher who regularly stays after class to help those students who are struggling; the police officer who may have to write tickets and, yes, sometimes arrest people, but who still sees the humanity in those he has sworn to "serve and protect"; the customer-service representative who, in answering scores or even hundreds of calls per day, still asks "how is your day going?" to each one of them; the busy executive who takes the time to drop off spare blankets at the local food shelter during a cold snap: these acts of humanity are hard to capture in a graph or "rubric." Yet they are the simple fabric of civilization that keeps us together even during the most trying times. If it is not self-evident after this past year that we must all of us, daily, "try a little kindness," then it never will be. In short, we teach the humanities—the classics—in order to teach young people how to be humane. We trust that the young minds and hearts so taught today will be the principled, compassionate leaders of tomorrow."

In reading CDA Charter Academy's charter petition, we were not able to find anything remotely similar to the passage above about the importance of civic virtue and service.

What's indeed striking however, is that KCA's heavy focus on moral cultivation does not at all compromise its ability to score very high on the national "rubrics." For example, in 2019 CDA Charter Academy's average SAT score was a 1279, and the average SAT score for BCSI schools across the country was 1191. In other words, the BCSI school score is only 88 *points* behind CDA Charter Academy. The national average in 2020 was 1051.

Fourth, neither STEM Charter Academy nor CDA Charter Academy offers robust sports programs compared to the local public schools. KCA has made it its mission to secure a large enough piece of property to offer not only basketball, volleyball, soccer, track, and cross-country, but wrestling, baseball, and possibly rugby as well. KCA also plans to offer robust after school clubs which may include programs such as woodshop, archery, shooting sports, drama, music, or other activities.

Fifth, KCA is deeply committed to serving what the IPCSC calls "at-risk and undeserved families" through intensive outreach, bilingual marketing, special education services, transportation and bussing, nutritional services and free lunch programs.

During the 2014 CDA Charter Academy transfer petition evaluation, the IPCSC determined that CDA Charter Academy only "partially met" the state standards for "reaching at-risk and underserved families." In the words of the commission:

"Historically, the PCSC has shown interest in ensuring that all Idaho charters go out of their way to make at-risk and underserved families aware of enrollment opportunities. Does the Academy apply any specific strategies for reaching families of low income, at risk, non-English speaking, special education, and similar students? The most recent revisions share the Academy's perspective that high achieving students also tend to be underserved in traditional schools; however, the previous PER's query regarding at-risk, SpEd, etc. students remains unaddressed. Staff notes that SpEd enrollment is projected at only 1-2%, which is much lower than the statewide average of about 7%. While self-selection by families is likely a legitimate factor, it is also important that charter schools endeavor to reach a diverse population."

In addition, CDA Charter Academy had no plans to offer any comprehensive transportation plans and bussing services. The IPCSC's response is as follows:

"Statute requires that public schools, including charters, provide student transportation "where practicable." Some charters have interpreted this to mean that they don't need to provide transportation if they can't afford it, because lack of adequate funds make provision of transportation impracticable. However, the statute was intended to refer to the practicability of transporting students in difficult circumstances, such as on mountain roads in winter. The most recent revision indicates that providing transportation is not practicable due to the large size of the primary attendance area (Kootenai County). In the past, some other public charter schools have amended their primary attendance areas to make them smaller and ensure eligibility for maximum transportation reimbursement from the state. CCA could consider a similar amendment. (The enrollment status of current students would not be affected.) Particularly in the light of the Academy's good fiscal health, it is important for the PCSC to understand why transportation is not being provided, and under what circumstances the school will offer this service." Please note that the PCSC may have questions regarding whether CCA believes that the decision not to provide transportation up to this point has resulted in the inability of some students from low-income families to attend."

Further, CDA Charter Academy did not choose to include any provisions for nutritional services. The IPCSC's response is as follows:

“Although no plan to provide nutritional services is in place, the SDE’s sufficiency review indicates that this section of the transfer petition meets SDE standards. Please note that the PCSC may have questions regarding whether CCA believes that the decision not to provide nutritional services results in the inability of some students from low-income families to attend.”

The IPCSC noted in summation that CDA Charter Academy only “partially met” the provision that the “petition revisions address most concerns and recommendations cited by the SDE and PCSC staff.” In the words of the commission:

“As noted in comments throughout this PER, some comments from the previous review were addressed only marginally. While perhaps unintentional, the use of oblique answers in response to direct questions – particularly with regard to issues surrounding availability of the school’s program to a diverse demographic – is concerning.”

Under “general comments” at the end of CDA Charter Academy’s petition evaluation, the IPCSC noted that “the PCSC is also obliged to protect the interests of students and taxpayers.”

In the interests of students and taxpayers, KCA has an extensive outline of programs and policies in order to address the needs of a “diverse demographic.” KCA plans to provide bussing from multiple locations in Kootenai County, Free and Reduced Lunch programs, nutritional services, bilingual outreach, and in general serve the entire community so that low income and marginalized residents can enjoy the same outstanding educational experience as their more affluent and mobile neighbors.

Sixth, although the letter claims that our school models are “almost identical,” CDA Charter Academy does not follow any particular curriculum:

“Our philosophy is based on the belief that academic excellence is to be found not in a specific curriculum, but in the hiring of qualified experts in their field of study, given the freedom to develop their own curriculum, based on their own strengths and professional judgment.”

This could not be more different than KCA, which follows the Core Knowledge sequence and the BCSI K-12 educational design, which are both very “specific” curriculums.

Mr. Thomson’s letter refers to Kootenai County as a “small market” and alleges that CDA Charter Academy, STEM Charter Academy, and even KCA itself would be “hurt” financially by the approval of the KCA charter petition. It’s quite remarkable that Mr. Thomson failed to mention that according to national news outlets like the WSJ and US News and World Report, Coeur d’Alene is the fastest growing city in the *country*, and represents the hottest housing market in the country, while Idaho itself is the second fastest growing state in the country. Spokane represents the fifth fastest growing city in the country. We’re bookended by two of the hottest growing cities in the *country*.

In other words, we’re not in a zero/sum environment by any means. Further, KCA has a much different school model than both STEM Charter and CDA Charter – we will all be offering a different type of school experience for area students and families. An important, real difference between KCA and STEM/CDA Charter is that KCA would welcome the establishment of new charter schools in our area – that’s how much confidence we have in our school model and in our area’s growth projections.

In 2015, during CDA Charter Academy’s transfer petition evaluation process, Idaho Ed News ran a feature on CDA Charter Academy. The feature opened with the following:

“Ask the seniors at Coeur d’Alene Charter Academy what sets them apart from other public high school students and they’ll tell you: They’re survivors. They’ve watched their class shrink from more than 120 students to just over 40.”

The article goes on:

It’s been a long process, says Principal Dan Nicklay, but the school is sticking to its singular focus: Academic success.

“The philosophy is: The few, the proud,” Nicklay says. “It was never stated that way, but that is the sentiment.”

Rather than “the few, the proud” KCA’s pervasive sentiment is “veritas, virtus, and vita” which means to study and pursue truth, to practice virtue and goodness, in order to flourish in life. We believe this type of mission will not only set us apart from all other area charter schools, but will serve our entire community, not just the few.

Kootenai Classical Academy's educational model will provide a unique addition to school choice options for Kootenai County, and will provide a much needed alternative for underserved and economically disadvantaged students. We look forward to working cooperatively with both Mr. Thomson and Mr. Nicklay for the enrichment of students and families in Kootenai County.

Sincerely,

Kootenai Classical Academy Board of Directors

Kootenai Classical Academy

K-~~6~~8 opening, growing to K-12

Opening Fall of 2022

School Location: Kootenai County

Post Falls, Idaho 83854



~~March 18, 2021~~ May 11, 2021

Ed Kaitz, Ph.D.

Board Chairman

Terrence O. Moore, Ph.D.

Founding ~~Principal~~ School Leader

Kootenaiclassical.org

Non Discrimination Statement:

Kootenai Classical Academy Charter 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.

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Executive Summary: Mission, Vision, and Core Virtues

Let us dare to read, think, speak, and write . . .
Let us see delineated before us the true map of man.
—John Adams, 1765

Executive Summary

Kootenai Classical Academy is being proposed as a tuition-free, open-enrollment, public charter school for students residing within Kootenai County, Idaho, and surrounding areas. Kootenai Classical Academy will provide an *American classical education* through a classical curriculum conveyed by dynamic teaching and through inspiring high standards of student behavior. To achieve this end, Kootenai Classical will offer a content-rich, comprehensive, spiraling curriculum based on a mastery of the “three R’s”, a systematic study of language, a combined fact-driven and inquiry-based study of the sciences, and a thorough study of the classic works of the Western and American tradition.

Such purposeful study will lead students to an understanding of themselves and of the world, both human and physical. Concerned with the hearts of young people as much as their minds, the school will quite naturally draw from this rich historical and philosophical tradition in order to inculcate in students the moral virtues and thereby prepare them to lead flourishing lives as engaged and productive human beings and citizens. Our aim for our students is quite succinctly expressed in our Latin motto:

veritas, virtus, vita

Translated, we want our students to study and pursue truth (*veritas*) and to practice *virtus* (virtue, goodness) in order to be prepared to flourish in life (*vita*), to include during the more trying times of life, both individual and societal, that challenge us all.

Kootenai Classical’s aim is to develop the academic potential and personal character of each of its students, regardless of cultural or racial background, socio-economic status, or ability level, and thus to graduate all students fully prepared to participate as intelligent, responsible, and active members of their community.

Mission

The mission of **Kootenai Classical Academy** is *to train the minds and improve the hearts of young people through a classical, content-rich education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue in an orderly and disciplined, yet dynamic environment.*

Vision

An American classical education follows the vision of the American Founders and other civic leaders and educators throughout our history. This vision holds that a traditional, liberal education based both on mastery of the rudiments of learning and a sustained inquiry into the best that has been thought, said, done, and discovered in our tradition is

the surest foundation for individual flourishing and leads, through a robust yet civil conversation about our well-being, to civic freedom, justice, and happiness for all.

While we understand the education establishment’s desire for “data” in achieving this vision, the contemporary standards of “college and career readiness” fall short of our ultimate mark. We know that a school that upholds learning to such a high degree will have a high percentage of graduates going to selective colleges, and then a disproportionate number of those going to graduate school and into demanding professions such as medicine, law, military service, teaching, and their own start-up companies. Yet a large part of our teaching aims at turning young hearts towards service to, and understanding of, their fellow human beings. The medical doctor who looks at his or her patients in the eye and talks to them about their health rather than simply filling data into a program; the teacher who regularly stays after class to help those students who are struggling; the police officer who may have to write tickets and, yes, sometimes arrest people, but who still sees the humanity in those he has sworn to “serve and protect”; the customer-service representative who, in answering scores or even hundreds of calls per day, still asks “how is your day going?” to each one of them; the busy executive who takes the time to drop off spare blankets at the local food shelter during a cold snap: these acts of humanity are hard to capture in a graph or “rubric.” Yet they are the simple fabric of civilization that keeps us together even during the most trying times. If it is not self-evident after this past year that we must all of us, daily, “try a little kindness,” then it never will be.

In short, we teach the humanities—the classics—in order to teach young people how to be humane. We trust that the young minds and hearts so taught today will be the principled, compassionate leaders of tomorrow.

Core Virtues

A large part of accomplishing the mission and vision of Kootenai Classical will depend on making the students active participants in their own education, especially by encouraging and training them to be good human beings as well as able scholars and active citizens. To this end, the school will explain and impart specific virtues in order to guide our students throughout life. These core virtues will include the following:

Courage Courtesy Honesty Perseverance Self-Government Service

To imprint these virtues and the school’s vision into students’ minds and hearts, the school will likely have our students, after saying The Pledge of Allegiance every morning, also say a school pledge that reflects our mission.

I will learn the True.

I will do the Good.

I will love the Beautiful.

Such engagement with students in the distinct mission of the school will (as has proven the case in other schools of this model) encourage them to be active, eager participants in their own education. Active engagement in rich, foundational learning, aimed ultimately at both

personal and civic happiness, is exactly the inspiring education an increasing number of parents and their children are actively seeking in our times.

Kindergarten through Twelfth Grade

It must be emphasized that Kootenai Classical will offer a K-12 curriculum, scope, and ethos—thus taking the child from the rudiments of learning to an exceedingly high level of thought and character. Such an educational trajectory is unique even in the charter-school realm and essential to our vision.

Section 1 – Educational Program

Means

To accomplish our mission, Kootenai Classical will employ the following means:

- teach reading and correct spelling through an explicit phonics program that gives children a systematic understanding of English orthography;
- require memorization of math facts, practice mental math, and explore the larger concepts behind mathematical operations;
- impart a mastery of language through teaching formal grammar, word origins in order to build vocabulary, and Latin;
- teach students to acquire mastery in writing through frequent writing assignments of varying lengths combined with study and imitation of the great writers of our tradition;
- likewise teach students to speak purposefully, convincingly, and politely in a variety of settings, as well as to listen to, analyze, and appreciate what others have to say, thus bringing students into an active participation in “the Conversation”;
- study great works of literature through close reading and dynamic Socratic discussion;
- cultivate citizenship and historical knowledge through an intensive study of our Western and American heritage, often using primary sources;
- teach both the facts and concepts of the sciences from the earliest grades in order to unveil the story of nature;
- require daily study of the fine arts in grades K-8 with a focus on the great compositions in music and art, as well as theory and performance;
- build character in young people through explicit training in the moral virtues combined with the study and emulation of good character found in history and literature;
- hire subject-matter experts steeped in the liberal arts and sciences to bring this both demanding and inspiring education to young people; and provide a disciplined and dynamic school environment in which students love learning, are active participants in their own education, make lasting friendships, and learn how to take part in “the Great Conversation.”

Curriculum Overview

At a true classical school, *content is king*. As such, we are very explicit in this charter petition about what the curriculum will be. Kootenai Classical will achieve its mission of providing an American classical education to all its students by adhering to the curriculum

below. The elements of this curriculum are time-tested, systematic, coherent with each other, and accessible to all children. Specifically, Kootenai Classical will teach the following:

- an explicit phonics program developed by Access Literacy, deriving from the research of Orton-Gillingham and the experience of the Riggs’ Institute;
- The Core Knowledge Sequence in grades K-8 for literature, history and geography, science, the fine arts, and an overarching cultural literacy;
- Singapore Mathematics from Kindergarten through pre-algebra;
- the Weeks & Adkins texts for algebra and geometry;
- the best current textbooks for the higher levels of math based on recommendation from a math professor/expert;
- supplemental programs in the elementary school to teach grammar and word sense, such as English from the Roots Up;
- Latin, beginning in grade six, through seventh and eighth, and at least one year in the high school;
- the high-school curriculum featured by the Hillsdale College charter-school partnership (Barney Charter School Initiative), originally developed by the Kootenai Classical founding [principal/school leader](#), featuring inter alia a great-books sequence in literature from the ancients to the moderns;
- a separate but allied sequence of ancient history through the twentieth century drawing heavily on the reading of primary sources;
- required courses in composition, government, economics, and moral philosophy;
- the writing of a senior thesis;
- and classical pedagogy. In a classical school, teachers must be masters of their subject matter and able to convey that knowledge to their students. In other words, teachers teach. Obviously, a school, like any other human endeavor, allows for a variety of styles and personalities, particularly in a K-12 setting. Yet whether teaching through lecture, Socratic discussion, or having students demonstrate mastery of the material as in poetry recitations, spelling bees, or working math problems at the board, the teacher will always be the leader in the classroom and leading students via clear, content-rich lessons.

Partnership with Hillsdale College

To help implement this mission, Kootenai Classical Academy will be a partner with Hillsdale College as one of the schools in the Barney Charter School Initiative (BCSI). As such, Kootenai Classical will be able to draw on intensive teacher training and other forms of professional development, various curriculum materials developed by the BCSI staff, and ongoing collegiality with over twenty-five similar schools in the Hillsdale network.

Charter schools assisted by the Hillsdale College Barney Charter School Initiative adhere to the following key characteristics:

1. The centrality of the Western tradition in the study of history, literature, philosophy, and fine arts;
2. A rich and recurring examination of the American literary, moral, philosophical, political, and historical traditions;
3. The use of explicit phonics instruction leading to reading fluency, and the use of explicit grammar instruction leading to English language mastery;
4. The teaching of Latin;
5. The acknowledgement of objective standards of correctness, logic, beauty, weightiness, and truth intrinsic to the liberal arts;
6. A school culture demanding moral virtue, decorum, respect, discipline, and studiousness among the students and faculty;
7. A curriculum that is content-rich, balanced and strong across the four core disciplines of math, science, literature, and history;
8. A faculty where well-educated and articulate teachers explicitly convey real knowledge to students using traditional teaching methods rather than using “student-centered learning” methods;
9. A school that uses technology effectively but without diminishing the faculty leadership that is crucial to academic achievement;
10. A school with a plan to serve grades K through 12, although the grades at school opening may be scaled back if reasonable.

As an outside, independent institution of higher learning committed to the liberal arts at the college level, and to the flourishing of K-12 education, Hillsdale is uniquely qualified to assist the Kootenai Classical board with board training, the school [principal](#) [school leader](#) with leadership training, and the faculty with teacher training. Such training draws upon the experiences of charter schools across the nation that now form a strong partnership, yet one that does not impede local self-government. Further, though by no means all or even most graduates of Kootenai Classical will attend Hillsdale, a classical school’s having a liberal-arts college as a partner and advisor sets up a concrete example of what constitutes “college readiness,” a phrase often invoked in today’s educational climate, yet without always being clear.

Hillsdale College’s BSCI is completely funded by donations to the college for that purpose and receives no revenue from the school. Hence this partnership is a valuable asset for a start-up school both financially and mission-wise since the school does not have to weigh “the cost” when deciding on whether to seek first-rate training and advice.

Sources of Educational Philosophy

The mission of Kootenai Classical Academy is derived from the history and philosophy of liberal education in Western Civilization and in America. Currently, traditional, classical education is experiencing a Renaissance in this country after decades of neglect. Within

this broader reform, Kootenai will follow the principles and curriculum of what might be called an American classical education, whose mission encourages the formation of human beings and citizens who will flourish in life and serve their communities and country in manifold ways. In order to embrace this mission, the school holds certain essays and texts to be foundational. Among those are the following.

E. D. Hirsch, *Cultural Literacy*

E. D. Hirsch, *The Schools We Need and Why We Don't Have Them*

E. D. Hirsch, *The Making of Americans*

William Kilpatrick, *Why Johnny Can't Tell Right from Wrong*

Robert Maynard Hutchins, *The Great Conversation*

Important Historical Sources:

Quintilian, *Institutio Oratoria (On the Education of the Citizen-Orator)*

John Locke, *Some Thoughts Concerning Education*

George Turnbull, *Observations upon Liberal Education*, ed. Terrence O. Moore

Benjamin Franklin, "Proposals Relating to the Education of Youth in Pensilvania" (sic.)

Thomas Jefferson, *Virginia Bill for the More General Diffusion of Knowledge*

Benjamin Rush, "A Plan for the Establishment of Public Schools"

Benjamin Rush, "Thoughts Upon Female Education"

In addition, the founding [principal/school leader](#), Dr. Terrence O. Moore, has written numerous articles and given many addresses on the subjects of classical education and public school reform. An article used by numerous schools across the country as a foundational document is his "A Classical Education for Modern Times."

Further, Hillsdale College has posted videos on important topics in classical education from its BCSI training over the past twelve years. These videos canvass both broad themes and commentary on how to teach specific subjects. These may be used as a resource for teachers, parents, and board members.

No school can accomplish its mission while leaving its philosophy on the shelf. As such, an important part of faculty training each year will be a return to first principles (ad fontes, as was said in the Renaissance) through a vigorous discussion of a foundational text as well as a Socratic discussion of some book or piece taught in the curriculum. The teachers will, no doubt, enjoy and appreciate these conversations. Hence, the school's own "professional development" will model what is supposed to take place in the classroom.

Instructional Practices and Curriculum

Kootenai Classical Academy will provide students a content-rich, classical education designed to challenge them to excel in both learning and character. What follows is more detail to elaborate on the academic program outlined above.

Kootenai Classical Academy will collaborate with Hillsdale College’s Barney Charter School Initiative (BCSI) in design and execution of the educational program. There is no other school in the proposed attendance area that uses this model. Further, the school will grow to serve grades Kindergarten through twelfth grade. Such a model is rare even in the world of school choice but is thus truly able to accomplish its mission by laying the solid foundation of classical learning in the elementary years, then building on that foundation with a robust inquiry into both the human and natural world—with the arts—that exceeds what most colleges accomplish in the way of liberal learning. Thus, Kootenai Classical will provide the parents and students of Kootenai County with further choice in the educational opportunities available in a public, charter setting. Hillsdale has collaborated with more than two dozen other classical schools to implement this curriculum, one that has shown success across a wide variety of student backgrounds. The curriculum is characterized by a strong emphasis on language, robust content in a core curriculum of traditional subjects, and a focus upon our historical, literary, and civic inheritance.

In the elementary years, KCA will use three key programs in the curriculum: Access Literacy, Singapore Math, and the Core Knowledge Sequence. These programs were selected because they are designed to lay the foundations of knowledge in the elementary years, and thereby enable students to acquire greater knowledge and understanding of the world as they progress in age and advance in their studies. Learning the fundamentals is comparable to being taught to use a map and compass. Being able to “land-navigate,” one can enter into the thickest forests, know where he or she is, appreciate the beauty and complexity of nature, and even reach a precise spot on the map—without fear or confusion but rather with joy and a sense of accomplishment. For someone unacquainted with a map and compass, the deeper one goes into the forest, the more utterly lost he becomes.

In the earliest grades, the curriculum focuses primarily on “the three R’s,” with a large part of the school day given to teaching literacy and numeracy. Both subjects are foundational to a student’s education, so the knowledge and habits of thought formed in each must become permanent. Over time, one may forget some of the details learned in history or science class or even parts of the happy songs sung in youth (though we hope not). Yet no one can afford to forget how to spell words or to marshal numbers or to speak correctly. To teach properly these foundational subjects, KCA will use the Access Literacy phonics program to teach literacy and the Singapore Math Program to teach numeracy.

The Access Literacy phonics program is a multi-sensory, brain-based approach for teaching phonics, spelling, reading, handwriting, and parts of grammar. It is comparable to the Orton-Gillingham and Spalding Methods, and is a major overhaul of the Riggs program. Access Literacy teaches the 71 letter-sound (phonogram) combinations used in the English language beginning with the easiest sight-to-sound correspondences, working towards those that are most complex. Syllabication is critical to a proper understanding of letter-sound relationships, so syllabication is taught beginning in kindergarten. While learning phonograms and marshalling them into systematic spelling and a growing knowledge of vocabulary, students will be formally taught handwriting, to include cursive in the middle elementary years. Further, as students grasp the basics of English literacy, the program lays a foundation in basic grammar and composition.

The Singapore Math Program provides students with a strong conceptual foundation in basic mathematics. From the earliest grades, this program emphasizes concepts and mental math while employing both physical and graphical illustrations of underlying mathematical rules and phenomena. The program presents mathematical skill building and problem solving such that students have a better understanding of not simply when to use a particular equation, but why. Moving students on to higher levels of math before they are ready is short-sighted, so the program will be geared to meet students' ability levels. Hence, ability-level groups will be determined at the beginning of each academic year.

The central position of language in the curriculum continues throughout the elementary and middle-school grades. In grades four (4) and five (5), students will learn Latin and Greek roots of English words. In the sixth grade, students will begin to learn formal Latin and will continue with Latin through grade nine (6-9). Latin is introduced and taught alongside English so that students learn the structural underpinnings of their own language, expand their vocabulary, improve their reading comprehension, and build a bridge to modern foreign languages as well.

As students mature in their facility with language, the curriculum directs more of their time and intellectual energy into more content-based (as opposed to skill-based) facets of the curriculum. The order and content of these subjects from Kindergarten through grade eight (8) is derived from the Core Knowledge Sequence made available through the Core Knowledge Foundation. KCA will employ the Core Knowledge Sequence to meet or exceed all Idaho State Standards and benchmarks. The goal of Core Knowledge is to build cultural literacy through a systematic curriculum that eliminates gaps in learning and also features "spiraling" wherein students re-encounter subjects they have learned as they reach higher levels of cognition. This sequence was developed to provide comprehensive order to K-8 education in the core subjects of literature, science, history, and the arts that constitute our cultural and intellectual inheritance. While Core Knowledge does set goals for study of the English language and mathematics, it allows freedom for schools to choose their own more systematic programs (such as Access Literacy and Singapore).

The Core Knowledge Sequence was first published in 1988 and has been successfully employed and tested in hundreds of schools throughout the United States. It is based upon E. D. Hirsch's idea of cultural literacy, which makes it the ideal curriculum for a classical school. The Core Knowledge Sequence provides a grade-by-grade sequence of specific topics to be taught in literature, history, geography, science, music, and the visual arts. Topics which are especially important for cultural literacy are repeated in a spiraling fashion so that younger students build a firm but broad foundation while older students are able to achieve depth of understanding. The Sequence, where possible, aligns the various subjects in a given grade, so that what is taught in literature will complement what students are learning in history and art and often even science. The sequence also invites a collaboration among teachers in different grades and with parents who are brought into the conversation about how the curriculum works and how they can best support their children (and often "keep up" with them academically). The Core Knowledge Foundation provides many helpful resources to support teaching of the Sequence. Nonetheless, both the principles behind Core Knowledge and the school's philosophy embrace the idea of

teachers becoming masters of their subject and thereby crafting their own lessons rather than relying on pre-fab lesson plans. To teach, teachers must know.

There are currently three schools in Idaho that consider themselves Core Knowledge schools, in addition to Treasure Valley Classical in Fruitland, also a partner of the BCSI. As indicated on the Idaho PCSC website, Core Knowledge schools “provide a curriculum that is both specific and sequenced,” with a “focus on building a broad core of shared knowledge in the early education years to empower deeper learning later.”

Although the rhetoric surrounding a classical school often emphasizes the humanities, the sciences are no less important and will not play a secondary role at Kootenai Classical Academy. The Core Knowledge science program focuses on thematically linked science topics and the biographies and discoveries of great scientists. The coherent order of the Core Knowledge program allows for regular repetition and mastery of the most important facts and concepts in the sciences, such that students are well versed in the fundamentals by the time they reach the demanding high-school science courses.

In the high school years, the students will truly be able to attain higher levels of thought and inquiry. In high school, Kootenai Classical Academy will follow the Hillsdale course sequence. This includes four (4) years of history, literature, math, and science; three (3) years of foreign language; a semester of composition; a full year of American government; and a semester each of economics and moral philosophy. In history, students begin with Western Civilization I & II in grades nine and ten (9-10), study American government integrated with the Revolution and Founding period of American history in grade eleven (11), and finish with a year of modern European history (1789-2000) in grade twelve (12). In literature, students read great works, usually in their entirety, with an emphasis on ancient and classical literature in grade nine (9), medieval and British literature in grade ten (10), American literature in grade eleven (11), and modern literature in grade twelve (12). The required track for science is biology in ninth (9), chemistry in tenth (10), followed by two additional science classes in grades eleven (11; physics if the student’s math level is sufficient) and twelve (12; an elective, most likely the second year of a science). In mathematics, students will follow a sequence based on their ability levels, beginning with algebra (which may be taken in middle school or earlier). That sequence will be Algebra I, geometry, Algebra II, trigonometry/precalculus, Calculus I, Calculus II. Students who prefer to take another math course (such as statistics) in their senior year rather than calculus may do so. In foreign languages, students will be expected to take at least one (1) year of Latin in high school and two (2) additional years of a foreign language, whether Latin or a modern foreign language.

The culmination of this comprehensive education will be the senior thesis. Seniors will be required to write a lengthy thesis based on a book or an aspect of one of the subjects they have studied that attempts to answer a question of their own design—that question somehow being rooted in the philosophy of the school (broadly, the nature of the human and natural world and the various means of human flourishing). The thesis will be written and delivered orally to fellow classmates, teachers, and invited guests, including parents, and will thereby serve as a rite of passage to an independent life of informed thought and responsible citizenship.

Despite the rigor and depth of this curriculum, the school will not limit students to “all work and no play,” nor be lacking in a vibrant school culture, both during and after school. First, the schools on which this school is modelled have all had a full fifty-minute lunch period for the upper-school students. Thus, the students can eat lunch, then play sports or help in one of the younger grades or just relax and converse (and sometimes study) for a half hour in the middle of the day, a break they very much appreciate. There will also be room in students’ schedules for at least one elective per year from seventh grade onward. Students will thus be able to take choir, band, theatre, one of the visual arts, physical education, or some other elective based on student demand. After school, students will be able and encouraged to participate in sports and other activities. Teachers will be given tips on how to make homework both useful and manageable so that students of all grades will have time for these activities and to pursue other interests outside of school.

E. D. Hirsch, Jr., *Cultural Literacy: What Every American Needs to Know* (Boston: Houghton Mifflin, 1987). For an outline of the humanities curriculum, including readings, see Terrence O. Moore, *The Story-Killers*, ch. 9, “A True Common Core” (2013).

Expected Student Outcome

The board, school leaders, teachers, parents, and the students themselves will know Kootenai Classical is achieving its mission when high standards of academic achievement, the spirit of learning, exemplary conduct, and a robust school culture combine to provide optimal learning opportunities for all students that will become manifest in standardized test results, high acceptance rates into post-secondary educational institutions, and other signs of effective education.

Student academic performance is central to a school’s existence. Student performance expectations must be aligned with the mission and the educational plan. The student performance expectations will provide student-centered goals that are SMART:

- **Specific**
- **Measurable**
- **Ambitious and Attainable**
- **Reflective of the school’s mission**
- **Time-Specific with Target Dates**

The school’s immediate goals are:

- By the end of KCA’s third year of operation (2025), 90% of continuously enrolled students assessed will score proficient or higher on the ISAT 2.0 Reading and Math sections.
- In years 3-5 of operation, KCA's scores on the ISAT will exceed those of the local districts.
- Once the high school is complete, KCA will have a 90% graduation rate by its 3rd graduation cohort.
- To measure successful training in character development, KCA will administer and review parent satisfaction surveys at the end of each academic year with questions specifically related to discipline, classroom decorum, character education, and the effectiveness in teaching the school’s core virtues.

- The survey will also ask specific questions related to student learning, such as the effectiveness of instruction, the amount and quality of content being mastered, and the students' enjoyment in and engagement with their own education.

Testing

The following assessments will be used to monitor student progress:

- ISIP ER (K-3)
- ISAT 2.0 and ISAT, Alts when appropriate (3-10 in both math and ELA)
- ISAT science (5, 7)
- science end-of-course exams (HS biology and/or chemistry)
- WIDA Access 2.0
- SAT exam (11)
- IELA (K-12, LEP only)
- NCSC alternative exam (3-8 and 11)
- PSAT (Grade 10, optional)
- Teacher-developed pre- and post-assessments
- Teacher-developed rubrics
- For grades K-8, KCA will administer the Iowa Test of Basic Skills (ITBS) within the first month of opening and each subsequent spring thereafter. This comprehensive, nationally normed exam offers teachers a way to assess how well their students are learning and retaining the curriculum. The ITBS also has the added advantage of measuring student achievement in different school settings and across the country. The ITBS covers the content areas of mathematics, language arts, social studies, and science. Since the proclivity of states to change standardized exams has been a phenomenon across the country (sometimes influenced by actions at the national level), and a state's standardized test can change at any time, having a nationally-normed test that has been around for decades will ensure consistency in school evaluation.
- Singapore Math assessments will be used as placement tests to determine math levels and as a means to demonstrate mastery of the material taught at each level.
- Starting in grade 8 and repeating as often as necessary in subsequent grades, a civics test composed of the one hundred (100) questions used by officers of the United States citizenship and immigration services will be given and a passing grade of 90% expected.

Kootenai Classical Academy will participate in all state-mandated testing. The school may appoint a testing coordinator who will oversee the testing program and ensure the process is followed with fidelity for all tests. The school will work with teachers, students, and parents to help them understand the importance of the assessments and the meaningful information that can be gained from them.

On the whole, the school will meet the state standards simply by teaching the curriculum in a classical way. Whereas the standards often call for general areas of mastery, such as being able to analyze literary texts in a certain way, the Core Knowledge Sequence in K-8, followed by KCA's demanding high-school curriculum, requires mastery of specific subjects and texts that meets or exceeds state standards. For example, in history and literature

from Kindergarten through second grade students will have learned the basic symbols and songs of American history and culture, the origins of Western Civilization in Egypt and Greece, the stories of the early American settlers, the history of the American Revolution, the framing of the U.S. Constitution, numerous fables from Æsop, classic fairy tales, tall tales, the nursery rhymes of Mother Goose, and even the nature of schools in our history through the novels of Laura Ingalls Wilder. Nor does the classical approach simply look at a particular work for a moment, then cast it aside, but rather insists upon mastery and often memorization of it so that students may carry that learning with them as a treasure throughout their lives and thereby compare what they learn in their early education to new things they learn in school and in their own experience. Thus, our students in these early grades will memorize, à la Laura Ingalls, traditional sayings, jingles, children’s verses, poetry, songs, the opening lines of the Declaration of Independence, the Preamble to the Constitution, American and world geography, and so on. Further, many of these lessons will quite naturally take the form of building character through mastering virtues. For example, reading the tale of John Henry is not simply an exercise in cultural literacy but an invitation to acquire the virtues of self-reliance and perseverance, virtues still very much needed in our times.

If the curriculum does not meet or address a specific standard at a given grade, time will be allotted over the course of the year to give that standard proper coverage. Instruction to this end will be provided by the [principalschool leader](#) to the faculty as a part of the annual professional development.

Plan for Serving All Students

A public charter school, as any public school, by law must offer a continuum of services for *ALL* students. Kootenai Classical will happily follow that expectation in the K-12 setting. As stated in the executive summary, the school’s aim is to develop the academic potential and personal character of each of its students regardless of cultural or racial background, socio-economic status, or ability level, and to graduate students prepared to participate as informed, responsible, and active members of their community. Hence, Kootenai Classical Academy’s vision for its students is not limited solely to their academic achievement but extends to their becoming responsible and happy human beings and citizens. The school will serve both the special-needs and the exceptional-needs student.

Special Education

Kootenai Classical Academy will adopt and comply with the current Idaho Special Education Manual from the Idaho State Department of Education. The school will use the forms for special education as outlined in the Special Education Manual. KCA will also ensure that all facilities are appropriately accessible for students with disabilities. On the school’s enrollment form, there will be a question asking, “Does your child have an IEP, 504, or any other support plan?” Until a special education teacher is hired, the [principalschool leader](#) will answer any questions parents may have about services provided by the school and will have access to expertise in this area through the BLUUM Foundation as well as Idaho Seta.

A certified special education teacher will be hired to implement special education programs. Classified assistants may be hired and trained to assist the special education

teacher with the teaching and support of SPED students. With oversight by the [principal/school leader](#), Child Find activities and evaluations will be completed within the appropriate time frame.

A continuum of services will be provided at Kootenai Classical. IEP (Individualized Education Program) teams will be established as set forth by IDEA and will, for a given student, include the student's general education teacher, a special education teacher, an administrative representative, the parents, other team members as appropriate, and the student himself or herself whenever appropriate, particularly when the student is older.

Special Education/Student Services Coordinator

The school will plan to hire the special education coordinator as early as possible so that incoming existing IEPs can be reviewed. What follows is a sample job description of the coordinator for SPED and overall director of what will be called Student Services.

General

The Student Services Coordinator is accountable to the [Principal/School leader](#).

The Student Services Coordinator shall:

- Ensure the academic integrity of the school by overseeing the modifications and accommodations for students in specialized programming;
- Oversee the education of students with IEPs, 504 Plans, and ALPs;
- Assist and supervise general education teachers to meet individual students' educational goals for students with IEPs, 504 Plans, and ALPs;
- Supervise and evaluate Student Services staff; and
- Set budget priorities for Student Services and have general knowledge of the department's fiscal status.

The following expands on the four main areas of responsibility:

Ensure the Academic Integrity of the School for Students with Specialized Programming

In order to maintain the academic integrity of the school, the Student Services Coordinator shall:

- Oversee school-wide practices to assure they are aligned with the requirements of the Idaho Special Education Manual;
- Remain faithful to the academic curriculum and character education in the school;
- Understand the importance of the defined curriculum;
- Ensure that modifications and accommodations are consistent with students' individualized needs relative to the school's mission and philosophy;
- Stress the importance of continued student progress both academically and in character development;
- Demonstrate mastery as a teacher to students;
- Develop the intellect of each student to the utmost of his or her ability;
- Develop the personal character of every student;
- Participate in annual professional development.

Oversee Mandated Educational Processes

To ensure the proper services and supports for students who need supplemental programming, as well as to ensure that the school is in compliance with state and federal laws, the Student Services Coordinator is expected to develop and/or oversee:

- Special Education support and services;
- English Learning program;
- Section 504 Plans;
- Advanced Learning Plans

Assist General Education Teachers with Implementing Specialized Programming

To ensure the proper services and supports for students who need supplemental programming, the Student Services Coordinator shall:

- Educate school faculty and staff regarding students with disabilities;
- Disseminate information regarding IDEA (Individuals with Disabilities Education Act) and ADA (American Disability Act), and any changes or updates to these laws;
- Collaborate with teachers to maintain consistent communication regarding student needs; and
- Oversee the effectiveness of modifications and accommodations.

Management of Student Services Department

The management of Student Services include the following to ensure appropriate direction to supplemental teaching staff and ensure progress for Kootenai Classical Academy's students:

- Direct supervision of Student Services staff;
- Collaborative work with the [Principal/School leader](#) to recruit and hire the best para-professionals, special education teachers, and other personnel for positions that will meet the individual needs of students;
- Definition and coordination of contracts for itinerant services (e.g., psychologist, speech therapist, occupational therapist) with the [Principal/School leader](#);
- Oversight of the effectiveness of the itinerant services;
- Coordination of services and support to align with student needs;
- Maintain consistent communication with teachers, parents, administration, and BOD, as needed;
- Management and monitoring of progress-tracking within the state structure (SPED, ILP, etc.)
- Management and keeping appropriate confidentiality of all student records and school reports;
- Close coordination with the enrollment coordinator regarding services for incoming students;
- Ensure the confidentiality and professionalism of the faculty and staff with regards to students in supplemental programs;
- Coordination of summer school programming.

Minimum Job Requirements

- Master's degree in a brain-based field (e.g., occupational therapy, speech therapy, or school psychology) or an equivalent combination of education and experience
- Bachelor's degree in a relevant and appropriate field as it pertains to student learning and development
- Familiarity with special education laws and regulations regarding IDEA
- A special education license approved by Idaho Department of Education or the willingness and ability to obtain licensure
- Experience with students who need additional supports and services
- Management/supervision experience
- Ability to speak and write clearly
- Ability to oversee specialized programming

Other Desired Characteristics

- Experience in educational management or administration
- Knowledge of charter or independent schools
- Interest in classical educational
- Interest in educational reform
- Previous K-12 education classroom experience
- Ability to adjust to the needs of the changing student population

Evaluation Process

The special education coordinator and the IEP team will review and, if necessary, revise current IEPs and consider the students' needs and continuum of placements and related services in order to meet educational needs as soon as possible.

Whether for students with existing or revised IEPs, or new students entering the school who are identified as needing support, individualized plans will be developed to maximize the students' time with peers in the least restrictive environment. Nonetheless, a variety of means of support may be made available according to the needs of each student and as outlined in the IEP.

Outside personnel may be contracted to provide the following services based on need: e.g., speech-language pathology, occupational therapy, physical therapy, and school psychologist services. Special transportation may be provided for those students whose IEP requires that service. The need for an extended school year, paraprofessional assistance, adaptive technology, positive behavioral supports, and assistive technology may be considered and provided if deemed necessary in line with the student's IEP.

When a student is suspected of having a disability that requires specially designed instruction, Kootenai Classical Academy will form an evaluation team comprised of members consistent with the requirements of the Idaho Special Education Manual to consider a student's eligibility for special education. The evaluation team reviews information from various sources including, but not limited to, response to intervention data, ISATs, classroom grades, formal and/or standardized assessments, curriculum-based measurements, and general progress in the grade level or subject. After reviewing all the data, the team will determine if a referral and subsequent consent for evaluation to

determine eligibility for special education services is appropriate. If the student meets eligibility criteria, the team then will seek parental consent for the student to receive special education services.

Whenever students do not clearly meet SPED criteria, the team may refer students to other avenues of support, such as the 504 process.

Behavior intervention plans will be utilized if a student has behavior that impacts his or her learning and/or the learning of others.

The IEP team will determine the best avenue and least restrictive environment regarding each student's needs. KCA may utilize a Response-to-Intervention (RTI) team meeting format to evaluate student response to such intervention, consisting of problem identification, analysis of the problem, appropriate research-based interventions, and progress monitoring.

In its recruiting efforts, KCA will ensure that prospective parents understand that the school is a public school that intends to meet the needs of all students, to include those with learning disabilities. The school will also work to ensure that parent and student rights are protected, to include in the handling of personally identifiable information in student special education records. All records will be kept confidential and locked in the SPED office.

Discipline and IEPs

The guidelines provided by the IDEA and the Idaho Special Education Manual will be followed with regard to disciplining students with disabilities. If a student currently has a Behavior Intervention Plan (BIP), the plan will be reviewed to determine if intervention and response steps were implemented appropriately in a given disciplinary situation. If a BIP is not in place, the IEP team will meet to determine whether a Functional Behavior Assessment is appropriate. A Behavior Intervention Plan may be implemented if the special education team determines that the behavior of the student impacts his or her learning and/or the learning of others. This intervention, if deemed necessary, would be included in the IEP. Counseling, both individual and group, will be available to all students, including those with disabilities.

English Learners

In order to meet the needs of bilingual students or those who have limited English proficiency, Kootenai will follow the guidelines of the state EL Guidance for Idaho Districts manual. English Learners (EL) fall into three categories: (1) students whose primary home language is one other than English, (2) students from heritage language groups needing enrichment and further development of English while maintaining fluency in their heritage language, and (3) any other students needing enrichment and further development of academic English. The school will use the required procedures to serve the language needs of English Learner (EL) students. These procedures may include the following:

1. Identification of the primary or home language other than English by administering the Home Language Survey when students are enrolled.

2. Whenever the Home Language Survey indicates a language other than English, administration of the WIDA Access Placement Test (W-APT) to determine whether the student is proficient or non-proficient in all language domains. If not, placement in an appropriate program within 30 days.
3. Student evaluation and student progress assessed annually until proficiency is attained.

For EL students, the school may contract with an appropriately certified EL or bilingual teacher who can provide assistance within the classroom to the student(s) as needed. In the classroom, and through supplemental support outside the classroom, the EL teacher may assist the classroom teacher through various means, such as rewording or adapting various texts or assignments, rehearsing and summarizing class discussions, asking basic questions to ensure student comprehension, providing background knowledge the student may not have, and simply extra reading practice. In addition, other appropriate strategies will be used as ways to transcend language barriers, including the use of apt visuals and demonstrations. Since a classical school places a great deal of stock in the fundamentals of language, cognates, i.e. word roots, or “word histories,” may be used to shed light on the English language and its similarities to other languages. The aim of all these methods is content mastery, which leads to growing confidence in the language in what will be a language-rich environment for everyone.

Depending on the demographics, needs, and resources, one or more program models may be implemented (as per State EL Guidance for Idaho Districts manual):

- **in the classroom in a “push-in” setting** - teachers assist English language learners with differentiated instruction within the classroom so that students are able to access the curriculum presented; or
- **in a “pull-out” setting** - students would be pulled out of the general classroom during *non-core* instructional time to receive intensive English instruction. In the early grades in particular, these pull-out sessions may reinforce, further explain, or offer more practice in the classroom lessons, particularly in the areas of phonics, grammar, and reading.

The curriculum itself is designed to give students a mastery of the fundamentals. As such, a classical school may prove to be the best setting for EL students. Both the phonics program of Access Literacy and Singapore Math are designed to meet the individual needs of all students. Since most students will not have been taught to read or spell using an explicit phonics method, all students in the elementary school will need to begin at the beginning: with the twenty-six letters and their sounds, the almost fifty letter teams and their sounds (the 70+ phonograms), and learning how these phonograms are deployed in words of varying difficulty. The traditional term for this approach is *orthography*, which could be called the science of correct spelling. The advantage of orthography is that it systematically shows how phonograms work in each word rather than depending on students simply to memorize the word (without rhyme or reason) or intuit “the code” of the English language itself with no instruction to that end. As has been revealed in many studies, about a third of children do not intuitively understand English spelling in the way that some of us “are just not good in math.” As such, the phonetic patterns found in the

Orton-Gillingham family of research have been used for students who struggle with reading because of some kind of barrier, whether having a different native language, being dyslexic, or having suffered physical injury affecting the brain—or who simply do not have a natural grasp of English spelling.

Our phonics program is a multi-sensory approach. That is, students *hear* the explicit sounds of the phonograms spoken by the teacher, *say* the sounds themselves in a choral response, *see* the teacher writing the phonograms on the board to form words, continue to *say* the phonograms as they write the words on paper, then *see* their own written words, marked with a code that enables them to understand what each phonogram is doing in the word (as when the letter O says its third sound, or the letters CH say their second sound). This multi-sensory way of teaching helps *all students* master and commit to memory what they are learning. Thus, rather than just being handed a list of unexplained sight words (the way most of us learned to spell), students hear, say, see, and write words whose spelling patterns are explained to them, thereby taking “ownership” of correct spelling. And they love it!

Needs in Mathematics

While there is no specific disability related to mathematics (though dyslexia can drastically affect a person’s reading of numbers) many students (and adults) struggle with understanding even basic calculation. Our increasing reliance on technology—which began with the hand-held calculator decades ago—has not helped but rather disguised what appears to be a growing trend of innumeracy. A classical school seeks to provide students with a mastery of numbers no less than a mastery of words. Realizing how and why students struggle with math shapes both our teaching and our program as we work with students of widely varying abilities in order to help them achieve true understanding.

In the same way phonics offers explicit instruction in the way words work, Singapore Math offers a conceptual approach to mathematics that explains how numbers work. The Singapore Mathematics curriculum comes originally from the country of Singapore, whose students have ranked at the top of international exams for decades. Its design addresses one of the flagrant shortcomings of much math teaching in America. Plainly, many students have trouble “seeing” exactly what numbers are and how numbers relate to each other, even when counting beyond a certain number. The Singapore program explicitly teaches students in three stages of math instruction: from the *concrete* stage to the *pictorial* to the *abstract*. Students in the early grades work with small “manipulatives” (such as popsicle sticks) that allow them to feel what numbers mean. Soon, they move to the pictorial, that is, symbols or bars to represent numbers as they interact, which the students may have to draw themselves. Then they are prepared to use numbers in the abstract and understand how they relate to each other in various operations.

Use of the pictorial to represent numbers does not stop in the elementary grades, however. Particularly with fractions, and then moving into pre-algebra, students must draw on bar-graph modeling to understand how mathematical equations actually work. For example, with bar-graph modeling students can see visually what a fourth of a half is—as it becomes one-eighth—rather than just following a rote, abstract procedure (multiply the tops of the fractions, multiply the bottoms) which does not truly register in their minds.

Such a method of teaching math supports students with varying needs. Whenever a student does not understand a particular operation, the teacher can always go back to the concrete or the pictorial representation rather than just stalling on an equation that makes no sense to the student(s).

The school will also differentiate math instruction by ability grouping in all grades beyond the early elementary (K and 1). Students, particularly those entering a charter school in the first few years, will have vastly different abilities in math. When all students are kept at grade level, the teacher is forced to teach to an artificial middle, which usually leaves at least a third of the students bored and a third confused. After initial evaluation and review, the students will be placed according to their ability levels during a common math block in the elementary grades while the upper school will offer a schedule allowing students to take the appropriate courses. The purpose of ability-grouping is *not* to “hold students back” in math, but rather to give them a solid foundation on which to build. If students do not master the basic operations, then their calculations at all levels will always be slow and mistake-ridden. Handing them a calculator in the early grades is “not an option.” Rather, we shall ensure that they master their math facts.

The school will explain the rationale of ability grouping to the parents and provide a culture in which students go to different teachers during “math time” but are not being demoted or put in “second-grade math” as third-graders, for example. Schools that have used this approach have been able to bring students who struggle with math up to their grade level more quickly and to build students’ confidence in their own math abilities as they learn to enjoy the puzzles, patterns, and mysteries of numerical relations.

Ability-grouping in math will also be the school’s approach to challenge students deemed gifted and talented in mathematics. The upper-school schedule will be made to ensure classes in pre-algebra, Algebra I, and possibly geometry will be offered during the math block in the elementary school for students who need that level of instruction.

A 2007 longitudinal study led by Dr. Greg Duncan of Northwestern University concluded that early literacy and math skill acquisition is the greatest predictor of later learning. By choosing sound research-based programs in phonics and mathematics, coupled with a classical curriculum that by definition is literacy-focused, we propose to provide students with these skills as a foundation to ensure a successful academic future.

G. J. Duncan, et al. “School Readiness and Later Achievement,” *Developmental Psychology* (2007) Vol. 43, No. 6.

Gifted and Talented

Classical education, by its very nature, upholds time-tested standards of excellence and is challenging and academically rigorous at its core. Students first encounter Shakespeare in the fifth grade. They first learn about Socrates in the second grade. They will start learning Greek and Latin roots at least by the third grade. As such, experience hath shown that students deemed gifted and talented in other schools are genuinely challenged by the demands of classical learning. The classical curriculum is by its nature a gifted and talented program for all students.

Obviously, certain students will excel more than others. Should a student wish to pursue a more demanding level of instruction than called for in class, the teachers will work to

provide such a challenge *within the curriculum* itself rather than creating an alternative curriculum or program. For example, when second-grade classes are memorizing the Preamble to the Constitution, a more talented or ambitious student could “keep going” and memorize as much of the Constitution as he or she can, or, if that proves too dry, just the Bill of Rights. In the fourth grade, the students read an adapted version of *Robinson Crusoe*. A student wishing to excel further could read Daniel Defoe’s original text, though written in eighteenth-century prose and not originally meant for children. In the sixth grade, students encounter philosophy head-on through their study of the Greeks and Romans, followed by the Enlightenment. Students wishing to go beyond the teacher’s lectures introducing the philosophical concepts of “the Cave,” the *vita activa* versus the *vita contemplativa*, the “state of nature,” the division of labor, and so on, could be given actual passages taken from Plato, Cicero, John Locke, Adam Smith, *et alia* to read and report on.

This approach of finding more challenges within the already rigorous curriculum could be compared to a Marine or soldier recruit who is not sufficiently challenged by the initial training hikes in boot camp. The drill instructor might put more weight in the recruit’s pack, already weighing fifty pounds. When the five-mile hikes on relatively flat trails turn to ten, then fifteen, then twenty-mile hikes in hilly country on days of ninety-degrees-plus temperatures, the recruit may not find the extra weight as essential.

Professional Development Plan

Professional development in the classical model will be an essential feature of Kootenai Classical’s annual program. Though training and evaluation is continuous, most faculty training will come in the form of book ends to the academic year: held in the last week or weeks of summer prior to the start of the school year and for two or more days in the early summer as an annual retreat involving similar schools.

Professional development is essential to the school achieving its mission. Though many teachers will likely have a background in classical education, whether in their own K-12 or college experience or in teaching, others will not. While elementary teachers may be very strong and well-trained in their particular academic disciplines, they may not be as well-versed in the classical approach to others. Further, even within the classical community there are different ideas concerning what is both most classical and most effective. Thus, the school’s faculty training will bring together all teachers in all subjects and for all grade levels to create a common conversation about what constitutes the school’s mission, vision, methods of teaching, and means of promoting good student conduct and progress within a vibrant and cheerful school culture.

Within this framework, the professional development will take several forms. There will be a significant amount of attention given to the mission and philosophy of KCA’s American classical approach, to common features of classroom management and school decorum, and to school policies and practices, all discussed as a whole faculty. Further, teachers will participate in training for individual subjects: phonics, mathematics, history, grammar, etc. Elementary teachers, who teach multiple subjects, should expect every year to participate in training for phonics, grammar, mathematics, literature, history, and science. While it might appear at first glance overkill for an experienced teacher to sit alongside a teacher new to the school and to the curriculum (and sometimes experienced teachers will not be

required to participate in the introductory phases of training), all of these subjects are both rich and complex enough to warrant repeated inquiry. In addition, both the insights and questions of more experienced teachers can be very helpful to newer teachers and to their veteran colleagues.

The largely subject-based training for upper-school teachers will usually be directed only at the teachers who teach those disciplines, with two provisions. First, all teachers should be given at least an introduction to all subjects taught in the school. Knowing what other teachers are doing in other subjects builds camaraderie, gives teachers a much broader understanding of the school, and invites a teacher to reflect on the methods of teaching his or her subject. (There are similarities between math and grammar, art and literature.) Second, upper-school teachers should be encouraged to attend much of the elementary training in their subject areas, again for several reasons. Doing so builds a strong alliance between upper-school and elementary teachers. It reveals to all teachers what the grade-level expectations of students are, what students will have learned in the earlier grades, what they should prepare for in the upper grades, and much more. And it both offers ideas for or roots out misperceptions of what methods should be used in any given subject or at particular levels.

Teachers (and school leaders) should practice what they preach. To this end, the school should feature a common book all the teachers and staff read over the summer and discuss in the faculty training. Rather than just talking about what The Great Conversation should look like, the faculty should participate in or “model” it. Such a conversation should give teacher insights into what is expected of them as teachers and what they should expect of their students. Though such a conversation could feature many different great books, it would be of most advantage if the chosen reading, 1) is a book that appears in the school’s curriculum (presumably on a rotating basis among elementary, middle, and high school), and 2) sheds light on classical, liberal education and/or the nature of children and youth. Here are some examples: Benjamin Franklin’s *Autobiography*; Frederick Douglass’s *Narrative*; Laura Ingalls Wilder, *Little Town on the Prairie*, esp. chapter “The School Exhibition,”; Mark Twain, *The Adventures of Tom Sawyer* (not “the model boy” of the village, nor the model student, but like many a young boy who just may end up in your fifth-grade class).

The training detailed above will be provided and orchestrated by the following leaders and institutions:

The Hillsdale College Barney Charter School Initiative (BCSI) holds an intensive week-long training for its start-up schools. This training addresses the mission and history of classical education, the teaching of various subjects, and the overarching expectations of a classical school. BCSI follows up on this initial training with two to three days of annual training on the Hillsdale campus for teachers at the various grade levels and subjects taught (i.e. early elementary, upper elementary, upper-school by subject). Further, members of the BCSI staff visit each school in the Hillsdale network at least once per year in order to provide guidance and training.

At the annual training in Hillsdale, teachers are able to meet and collaborate with other teachers from across the country, many of whom have been in these classical schools for some time. Some of the training is led by these more experienced teachers. This kind of training conducted by those who “know the ropes” is very beneficial to teachers: both in offering new ideas for “best practices” but also in reassuring and guiding them when some things are just hard by their very nature.

The founding [principal/school leader](#) of Kootenai Classical, Dr. Terrence Moore, has been a leader in the classical charter movement for nearly twenty years. As the founding [principal/school leader](#) of Ridgeview Classical in Fort Collins, Colorado and the lead architect of and first leader- and teacher-trainer in the Hillsdale initiative, he has conducted and supervised teacher training for numerous schools, both start-ups and those well-established. He will both personally conduct some of and orchestrate the rest of the faculty training for KCA, particularly after the start-up year. His experience and connections will allow him to draw upon excellent veteran teachers from across the country who will be able to help teachers improve their craft in very specific ways.

Over time, both in-house and in-state training will figure prominently in the Kootenai Classical professional development. After a couple of years, certain teachers will no doubt have distinguished themselves as masters of their craft. Such teachers are often informally consulted by their colleagues for advice about what works in the classroom. A school with outstanding teachers does well to use their talents to help lead discussions and train other teachers, particularly those new to the school and new to teaching altogether. This is also a good way to train future school leaders, whether of this school or others.

Another feature of the growth of the classical school movement is an increasing level of collaboration among schools in the same state or region of the country. States that have had classical charters for some time have built, or are beginning to build, collaborative efforts such as annual conferences and rotating faculty visits. These efforts allow teachers who are geographically closer and teach in the same state system to discuss and trade their ideas. As more classical charters come to Idaho, no doubt such joint training will increase.

While the kinds of training needed to achieve the school’s mission vary according to grade level and subject matter, certain common elements transcend age and subject. The school will work to ensure teachers have these fundamental ideas of good classical teaching on their minds as they prepare and execute their lessons. Such elements or questions are:

- How does a teacher provide teacher-led instruction that nonetheless engages the students individually and enlivens the class as a whole?
- How does a teacher employ the Socratic method? What does Socratic inquiry look like in different subjects and at different grade levels?
- How do more lecture-based classes (history and science) tell the story of the human or the natural world and keep students engaged while doing so?

- How do the arts (visual and musical) appeal to certain models of excellence, and can the modern student imitate or be inspired by these models?
- How does a teacher create study questions, quiz and test questions, and essay questions that engage and do justice to the subject as they inspire the students' minds, thus resulting in true understanding?
- How does a teacher develop assignments and tests whose "shelf-life" extends well beyond the assignment itself but remains in the students' minds, thus producing cultural literacy, a storehouse of knowledge, and genuine, life-long participation in The Great Conversation?
- Aside from day-to-day student participation in class discussion, what other forms might the rhetorical component of classical education take? These should include memorizing of poetry; brief statements or reports from the front of the class; class debates; mini-lectures on appropriate subjects, such as a work of art, "justifying one's answer" as in a math class, etc. The student's academic course at Kootenai Classical will culminate in a senior thesis both written and presented orally to his or her classmates, teachers, and other invited guests.
- What constitutes fair and effective grading? (Hint: Our ideal ought to be a "Golden Mean" between every student easily making straight A's, on the one hand, and most of the students "bombing" a test or a class, on the other.) This topic is particularly important since most students will enter the school without a classical background, and the material being taught is very demanding. Over time we should see greater mastery of the curriculum and therefore significant improvement in grades for all.
- To what extent can/should modern technology be used in a classical school?

In addition to training, the Hillsdale BCSI and the Core Knowledge Foundation have ample resources that help teachers prepare lessons and follow the sequence in any given subject or grade level. Singapore Mathematics and Access Literacy likewise offer such resources. Time will be provided during the training to show teachers how to use these materials.

Obviously, the bulk of professional development will be devoted to the curriculum and teaching. Nonetheless, sufficient time will be given to other essential topics: maintaining good discipline and decorum in the classroom; SPED, EL, and differentiated instruction; effective communication with parents; school policies and procedures, the grading portal.

Of those topics, the most essential will concern student conduct and classroom rules and overall decorum. Teachers will be instructed in the best techniques and school's policies and philosophy of what is usually called "classroom management." The basic strategy is to combine structured learning wherein students always know what is expected of them with interesting lectures and discussions that keep students engaged and with appeals to the best in their nature through an explicit teaching of the moral virtues (of which the school will choose six as its "core virtues"). In addition, the school will have a fair and consistent plan of discipline to correct behavior when it is not appropriate or conducive to learning. This plan will vary according to grade level so as to be age-appropriate but will throughout the grades require students to acquire what the school will call "self-government." Though teachers may have different "styles" or "voices" in implementing discipline, as is the case with teaching, all teachers will embrace the school's philosophy and practices of promoting good behavior.

Faculty and Staff Performance Evaluation

Through a fellowship of the BLUUM Foundation, Kootenai Classical has hired a founding [principalschool leader](#) who has eleven years of experience as a school leader, eight years as a college professor, and was the lead architect of the Barney Charter School Initiative at Hillsdale College. He will be able to hire the school's faculty and staff in the year prior to the fall of 2022, when the school will open. The [principalschool leader](#) has hired faculties for three different start-up charter schools. In addition, he will hire personnel for staff (non-teaching) positions as needed. The [principalschool leader](#) will obtain training in Idaho-specific administrative procedures.

In addition to the training provided by the Hillsdale initiative, the [principalschool leader](#) will clearly explain to the teachers expectations for their teaching, classroom management, various administrative responsibilities (such as taking attendance in a timely manner, getting in grades, etc.) communication with parents, monitoring students outside the classroom, and the various aspects of school safety.

From the first week, the [principalschool leader](#) will be a presence in the halls and in the classrooms to ensure the teachers fully understand and are following the expectations of the school: with the [principalschool leader](#)'s understanding being that this is a first-year school, many teachers may be in their first-year of teaching, and the school has a very unique mission. Thus, much "OJT" is to be expected. Teachers should feel that they can go to the [principalschool leader](#) with questions and to get help in what is a friendly and productive learning environment for all. Even beyond the first year, when most of the teachers are experienced, there should always be a culture of self-improvement.

This culture is best created—at least in the classical community—by what is called “the Conversation.” Teachers should expect the [principalschool leader](#) or, eventually, lead teachers to come into their classrooms, to observe, and then to discuss the lesson afterwards. Rather than a highly formal and formulaic evaluation, the [principalschool leader](#) or lead teacher should be able to give a teacher advice for improvement as well as comment on the strengths of the lesson—with guidance on the subject itself—through a conversation that includes “I likeds”, questions, commentary, and suggestions. Thus, the idea of a conversation which animates the school extends to the evaluation of teaching. The hope is teachers will actually enjoy the [principalschool leader](#) visiting classes and look forward to such “feedback” rather than dreading a hyper-official highly formal evaluation. Though this personal approach may seem antiquated in our über-rubricized and numbers-driven universe, it is most definitely *the classical approach* to teaching—in this case teaching the teachers. Was Socrates or Plato or Aristotle (or Jesus) ever evaluated by a rubric? Did Quintilian use that method with his *magistri*?

Annually, teachers should receive a formal evaluation, which includes an interview and a written evaluation to be kept in the teacher's file. The [principalschool leader](#) should have the flexibility to follow the same conversational style (as opposed to a rubric) in the written evaluation as long as the teacher is able to see clearly his or her strengths, level of professionalism, areas needing improvement, and overall contribution to the school.

In the case of most teachers, this classical and humane approach to teacher evaluation and improvement is both useful and motivating—for both new teachers and those masters

of their craft who have been teaching for years and, frankly, want to be treated as adults. There are some teachers who, though, either from want of ability or lack of willingness on their part, do not improve where improvement is clearly needed. In these cases, a more formal letter may be written notifying the teacher of specific areas of correction or change. Further, the [principal](#) [school leader](#) may consider having others visit the class to observe and potentially to help the teacher, whether through suggestions or direct support. For first-year teachers, particularly of younger students, it may just be the teacher needs an extra hand in the classroom, modelling, and/or to be told exactly how to perform certain important tasks. Every effort should be made to help the teacher improve.

When the expected improvement is not forthcoming, the [principal](#) [school leader](#) may reassign the teacher to other duties (if such duties exist and if there is a good chance of the teacher's improving) or terminate the teacher's at-will agreement. There are, of course, other reasons for terminating an employee, e.g., lack of professionalism, the use of inappropriate language in class, or a failure to perform assigned duties (such as getting grades in or being chronically late for class).

Teacher performance and improvement on the whole, though, 95% of the time follows the adage we teach our early elementary students: "Where there's a will, there's a way."

Members of the office staff or leadership team will be evaluated in a way similar to the teachers, though clearly a different kind of observation will take place. Whereas the faculty will meet regularly to discuss matters related to the classroom, school culture, upcoming events (such as a parents' night), and the like, the office staff will usually meet as a smaller group or individually with the [principal](#) [school leader](#) to discuss various administrative functions: e.g., enrollment, finances, book orders. Often the staff will need to meet prior to introducing something to the faculty. Staff members may be required to attend faculty meetings when needed. It is likely that staff will be able to meet during the school day, whereas faculty meetings will be held after school on a particular day.

Section 2 – Financial and Facilities Plan

Fiscal Philosophy and Spending Priorities

Kootenai Classical Academy will function as a non-profit organization managed under the “Idaho Nonprofit Corporation Act,” as outlined in KCA’s Corporate Bylaws and Articles of Incorporation. Charter schools differ from ordinary non-profit corporations in a number of ways. In the case of finances and funding, charter schools are largely publicly funded but may receive some funding through philanthropic sources, particularly important due to the responsibility of fulfilling the obligations of public schools albeit on a reduced budget. Not only must the charter school choose its spending priorities carefully, but it must have a heightened financial accountability and make wise fiscal choices. Charter school boards must practice robust financial oversight of management.

Kootenai Classical Academy’s fiscal philosophy is focused on the principle that all money will be prioritized to achieve excellent education of our students. KCA will have a balanced operating budget. A balanced budget is defined as a budget in which revenues are equal to (or greater than) expenditures. Our goal is to strive to have a budget with no deficit, but possibly a surplus, which will be saved in a contingency fund for unexpected needs that may arise. The budget will follow a realistic projection of future operating revenues and uses of funds. The budget will be prepared with thoughtful consideration of the school’s mission combined with the requirements of the Idaho State Department of Education and federal and local legislation.

The school will make every effort to ensure timely payments of all liabilities. Further, all expenditures will be regulated to make certain that sufficient funds are available to cover all financial obligations. KCA’s goal is to eliminate the need to borrow money. To this end, the school will be resourceful and frugal in managing and allocating our resources as well as strategic in finding additional sources of funding.

KCA will strive to be open and accountable in all relevant financial matters. The school will continue to communicate with all persons, groups, or organizations that have an interest or concern in our school. The KCA website and other media will be used to make sure our information is easily accessible.

KCA will make every effort to pay fair and competitive wages to its employees. These salaries will be reviewed routinely and in a timely manner, but no less than the beginning of each school year. This is an important tool in attracting and retaining a talented faculty and staff.

KCA values its relationships with all vendors in our community and beyond. The school will routinely review its fiduciary relationships to ensure the reasonableness of fees paid and that other contractual requirements are being met. These relationships may include, but are not limited to, attorneys, auditors, special education services, other contractors, and facilities.

Financial Management Plan

The budget is prepared by the [principal](#) [school leader](#) and approved by the governing board in compliance with Idaho Code § 33-801 and policy of the State Board of Education.

It is presented at a public hearing in May (first reading) and June (second reading) of each year and is delivered to the State Department of Education as required on or before July 15th prior to the beginning of the school year.

Income sources will include state allocation per pupil, federal grants, private grants, business partnerships, and donations. The purchasing process will comply with Idaho Code § 33-601.

The accounting records will be kept in accordance with generally accepted accounting principles and standards. The school ~~principal~~school leader will be responsible for financial management, the daily monitoring of revenue and expenses, and managing cash flow. Per KCA's bylaws, the governing board has the task of ensuring the financial integrity of KCA's budget; therefore, the KCA governing board exercises fiduciary oversight of the school's finances.

The founders of Kootenai Classical believe the affiliation with the Hillsdale College BCSI provides critical support in the technical areas of starting a new charter school. Many charter schools are blindsided by a host of issues that are difficult to foresee. The experience, guidance, and rich network BCSI provides will be essential to KCA's success. BCSI provides a two-day training session to BCSI schools and founders of future BCSI schools in board governance principles, including financial oversight. Seven founding board members of KCA attended the most recent BCSI training session in April 2021.

~~—Kootenai Classical Academy's Governing Board will work in cooperation with the Idaho Charter School Network and/or its representative who will be handling all the back-office procedures. This back-office representative will train and~~ Kootenai Classical Academy will receive back-office financial support from Bluum for the preoperational year (July 1, 2021 to June 30, 2022), with the likelihood that the in-kind grant from Bluum will be renewed for the subsequent year starting July 1, 2022. Bluum will provide KCA with budgeting, accounting, and strategic financial support. provide guidance on Idaho state-specific financial management, ensure that the board and school staff are aware of state-specific requirements, will review the school budget periodically, and make appropriate budget adjustments as needed. Amended budgets shall be submitted to the State Department of Education pursuant to Idaho Code Section § 33-701(9). The school will strive to maintain an operational reserve in order to account for any contingencies.

Dr. Brian Carpenter, who provides a portion of the Hillsdale board training, makes it clear in his seminars and in the subsequent training materials that the . . . “[~~principal~~school leader and business manager] will be responsible for managing the school's financial position, i.e. the routine spending decisions, maintaining financial records, making deposits, filing payroll taxes, etc. The governing board is responsible for the oversight of the school's financial management. The board's responsibility is to ensure that all management responsibilities are properly executed and that the school's money is reasonably safeguarded from risk.”

According to the training and follow-up materials, examples of “oversight of financial management” includes (but is not limited to) policies that help the board ensure that:

1. board members, other volunteers (e.g. lunchroom volunteers) and staff members with access to material amounts of school money are bonded;
2. the school's money is on deposit only in places and investment vehicles approved by the board;
3. management expenditures are within approved budget parameters;
4. long-range financial planning is conducted and that it reflects the board's priorities for the school;
5. documents such as IRS form 990 for schools that are 501(c)(3) are accurate and filed on a timely basis; and
6. management is using auditor-approved accounting procedures and methods.

Dr. Carpenter goes on to state that, "Two of the most valuable financial oversight policies a board can have are:

1. an internal control policy (segregation of duties). Such a policy helps prevent any individual from having unfettered access to the school's money. Failing to have such a policy can cost your school dearly; and
2. an auditor selection policy through which the board takes the lead in selecting the auditor. Among other things, the board should ensure that the auditor is independent from management." (Carpenter, Brian, 2011)

Carpenter, Brian, L., (2011), BoardWiser™, Navigating the Intersection of Governance and Management Series, 7 of 12. Brian L. Carpenter, Ph.D. & Associates.

Description of Facility Needs

As noted in the education program section, Kootenai Classical Academy features a traditional, classical education curriculum. The two most common instructional strategies employed by the school will be lecture and Socratic inquiry and discussion. The guiding principle for most K-12 instruction is that instruction will be "teacher-centered," (which actually means subject-centered), that is, in the form of a lecture, story read aloud, or teacher-led discussion. Teacher-led discussion in the lower grades will help to model inquiry and analysis for students as a way of preparing them to engage in more open Socratic discussion in high school.

This traditional instruction requires rooms with individual desks and the ability to structure rooms to focus on the teacher's instructional location, commonly the front of the class. KCA anticipates the need for facilities with classrooms that will accommodate up to 27 students per classroom as well as a commons area (which may double as lunchroom area and gym) and staff and administrative offices. The school may use the 850 square foot recommended size for classrooms as a minimum size for most classrooms. The science lab(s) and art and music rooms must accommodate the extra space needed for their equipment and activities. Ideally, the office suite would also have a conference room for meetings of office staff, parents and administration, special education teams, and the like.

For the 2022-3 academic year the school will need ~~16-18~~ classrooms for grades Kindergarten to ~~six-eight~~ (68), plus offices, a commons area, and lunch facilities. That breaks down into ~~14-16~~ K-6-8 classrooms (or homerooms) plus a room each (preferably larger) for art and music. In addition, the building itself or site should accommodate additional rooms for the following years as the school adds at least one grade per year.

To accommodate grades K-12, KCA will need ~~about twice that~~ approximately 32 classrooms.

Please see Appendix A for the budget model and facilities plan. On May 5, 2021 we put in an offer on a 15 acre parcel of land at the junction of W Prairie Ave. and N. Meyer Road in Post Falls. This is "Site 1". This piece of property is located in the center of significant residential growth between Post Falls and Rathdrum, Idaho, and is also a significant distance away from the two other public charter schools in our area – STEM Charter in Rathdrum and Coeur d'Alene Charter in Coeur d'Alene. Our offer was accepted by the seller and we are currently engaged in our due diligence period investigating annexation issues and utilities issues with the City of Post Falls. We are very excited about this piece of property because it will give us the opportunity, in addition to our outstanding educational program, to offer a very promising sports program complete with a full-sized track, soccer field, and baseball field.

We are also currently pursuing a 5 acre piece of property at the corner of W. Seltice and N. Pleasant View Road, on the more western side of Post Falls. This is "Site 2". This property has the advantage of available utilities but is a third the size of the first site, and costs \$200,000 more at \$1.7 million. We will continue to keep this property in reserve as a backup and we will also continue to look for optimal locations for our school should site 1 not meet our due diligence expectations.

Our preference is to be centrally located in Kootenai County (hence the name of our school), most likely in Post Falls, and accessible to parents traveling via I-90, Hwy. 41 and Hwy. 53. As will be explained below, this is a region with a high rate of growth and is not currently served by existing charter schools.—Please see Appendix A for the budget model and Appendix C for building and site layouts. At this point in our property search we have established a viable, 9-acre option along HWY 53 and Pleasant View Rd., which includes a site plan for a K-12 school (again, please see Appendix C for a site layout proposal for this property). We are also currently pursuing property options along HWY 41 between Post Falls and Rathdrum, and are currently in negotiations with residential home developers and private land owners in that area with the goal of acquiring an 8-10 acre parcel of land as further options for our school location.

~~—Our preference is to be centrally located in Kootenai County (hence the name of our school), most likely in Post Falls, and accessible to parents traveling via I-90, Hwy. 41 and Hwy. 53. As will be explained below, this is a region with a high rate of growth and is not currently served by existing charter schools.~~

School Lunch Plan

Kootenai Classical Academy developed a detailed budget for a school lunch plan based on the experience of several Idaho charter schools, including Idaho Arts and Future Public School. Both schools usually generate a small budget surplus, this surplus is often used in future years. The detailed budget shown here represents the best estimate of the revenue and costs for Kootenai Classical Academy’s school lunch program.

Table 1: Estimated Revenue & Costs, KCA Lunch Plan

				2022/2023		Worst Case		2023-2024		2024-2025	
Breakfasts Per Day				86.00		65.00		96.00		107.00	
Days				166.00		166.00		166.00		166.00	
Meal prices:				1.50		1.50		1.53		1.56	
				21,414.00		16,185.00		24,382.08		27,708.72	
Lunches Per Day				214.00		163.00		241.00		268.00	
Days				166.00		166.00		166.00		166.00	
Meal prices:				3.40		3.40		3.47		3.54	
				120,781.60		91,997.20		138,820.82		157,487.52	
TOTAL REVENUES:				142,200.00		108,200.00		163,200.00		185,200.00	
FRL Specialist Fee				12,000.00		12,000.00		12,000.00		12,000.00	
FICA/Medicare											
	Rate	Hrs	Days								
Manager/Cook	25.00	8.0	171	(34,200.00)		(29,070.00)		(29,942.00)		(30,840.00)	
Assistant	11.00	5.0	169	(9,295.00)		(6,971.25)		(7,180.00)		(7,395.00)	
Assistant	11.00	5.0	169					(9,295.00)		(9,574.00)	
Assistant	11.00	5.0	169							(9,295.00)	
Additional Staff help at Lunch	10.00	2.0	166	(3,320.00)		(2,290.00)		(2,359.00)			
PERSI				(5,184.60)		(4,296.12)		(4,424.94)		(4,557.61)	
FICA/Medicare				(3,581.35)		(2,932.34)		(3,731.36)		(4,368.46)	
Medical +				(6,000.00)		(6,300.00)		(6,615.00)		(6,946.00)	
				(49,580.95)	-35%	(39,859.71)	-37%	(51,547.31)	-32%	(60,976.07)	-33%
Food Cost				(85,320.00)	-60%	(64,920.00)	-60%	(97,920.00)	-60%	(111,120.00)	-60%
				(134,900.00)		(104,800.00)		(149,500.00)		(172,100.00)	
				7,300.00		3,400.00		13,700.00		13,100.00	

Transportation Plan

The school is committed to teaching all students whose parents wish them to attend. Thus, we shall work to make sure there are no barriers preventing students’ attendance based upon financial need. To that end, one important logistical operation to work out is a transportation plan. The first step of this plan is to make available to parents who want to carpool a map of all parents in their area who have expressed an interest in carpooling. There are several applications (“apps”) that currently service this need. Carpooling is particularly helpful for parents with difficult work schedules or who live rather far from the school and do not wish to make such a drive twice per day, every day.

In addition, the school will offer bus transportation to students for whom carpooling is not an option. To this end, the school will ascertain from the enrollment forms which parents need transportation provided and accordingly form a bus plan based on areas of the community that have need. We have provided a map of sample bus routes to one potential school location. This map features buses on three different routes, each one moving through an area of the county wherein live families with greater financial need.

With regard to bus transportation, the major choice the school must make is whether to operate one’s own bus service or hire a contractor. Based on the experience of other schools, KCA will likely pursue a middle route, that is, hiring a bus service provider. In

order to assure cost effectiveness, the school will take bids from several bus companies and speak with school personnel currently using those providers. In particular, we have made contact with a bus service which services schools in Idaho, Washington, Montana, and the Dakotas, including a well-established charter school in far North Idaho.

Should we find a competent in-house service provider who could run buses that we purchase through grants or lease, we would consider that option, provided we knew we would be reimbursed those costs by the state. Treasure Valley Classical in Fruitland has followed that route, and we are in contact with their administration.

For the moment, exact plans cannot be made since we do not know the extent to which families will need to rely on bus transportation. Nonetheless, here are two likely options and the numbers associated with them.

First option:

- Bus company providing service for three routes, roughly 12 miles in length, with buses kept on school property. Each route would be priced at two hours in the morning and two hours in the afternoon. (See another charter school’s route/expense sheet attached.)
- \$400 per route per day X 3 buses X 170 school days = \$204,000
- This is a high number, but will be kept in mind to allow for a competitive bid and in case we do not need three routes in the opening year.

Second option:

- An in-house service provider operating buses we lease. (See attached.) The cost of the buses (over \$273,000) would be carried in a lease of approximately \$4000 per month, or \$48,000 per year. We would be reimbursed significant amounts for the buses and the services provided, including a first-year depreciation amount of over \$45,000, which would almost cover the cost of leasing the buses. The remaining costs would also be reduced by reimbursement from the state, leaving a total expense of \$75,989 per year, less than we currently have budgeted.

Table 2: Bus Transportation, Second Option

<u>Accounts Payable</u>	<u>Amount</u>	<u>Reimbursement</u>	<u>After-Reimbursement Cost</u>
<u>Three 77-passenger buses</u>	<u>\$ 273,000</u>	<u>85 % (Over 12 Years)</u>	<u>\$ (1st year) 45,591</u>
<u>Lease / Loan</u>	<u>\$ 48,000</u>	<u>16.7% first year</u>	
<u>Logistics (1 year)</u>	<u>\$ 80,000</u>	<u>50%</u>	<u>\$ 40,000</u>
<u>Driver salary (3)</u>	<u>\$ 40,000</u>	<u>50%</u>	<u>\$ 20,000</u>
<u>Fuel</u>	<u>\$ 10,000</u>	<u>50%</u>	<u>\$ 5,000</u>
<u>Bus insurance (3 buses)</u>	<u>\$ 3,750</u>	<u>0%</u>	<u>-</u>
<u>LMRS (Radios)</u>	<u>\$ 3,500</u>	<u>85%</u>	<u>\$ 2,975</u>
<u>Bus washing</u>	<u>\$ 3,000</u>	<u>85%</u>	<u>\$ 2,550</u>

<u>Accounts Payable</u>	<u>Amount</u>	<u>Reimbursement</u>	<u>After-Reimbursement Cost</u>
Mechanical inspections	\$ 3,000	50%	\$ 1,500
Routing software	\$ 1,500	50%	\$ 750
Bus storage	\$ 1,000	0%	-
Driver training (CDL)	\$ 500	0%	-
DOT physical (3)	\$ 500	85%	\$ 425
UA test (3)	\$ 60	50%	\$ 30
Total	\$ 194,810	-	\$ 118,821
Total cost after (R)	\$ 75,989	-	-

The bus plan would have three routes, two coming from the south and one from the north. We will obviously figure these routes according to where families who need bus services live, but based on the demographics of the county, the likely routes would be the following (also, please see Figure 1, following):

From the Southwest:

- If needed, start at Woodbridge Park on Seltice in Post Falls, north of I-90; drive westward on Seltice, with a possible pick-up along Seltice; cross I-90 on Spokane; pick up at the circle at Spokane and 3rd Streets; drive eastward on 3rd, possible pick-ups at Black Bay Park and/or Skate Park; drive northward on Greensferry, eastward on Seltice; pick-up on 3rd Street (south of Seltice) if needed; head North on 41; likely pick-up at 41 and 16th (in Goodwill parking lot if permitted, or storage unit across the street that was supportive in our leaving flyers); rest of route to school on Prairie and Meyer.

From the Southeast:

- From the Southeast (as shown): Start just north of I-90 at 15th, picking up in Cherry Hill Park; cross I-90, drive westward on Harrison, pick-up at Goodwill or St. Vincent Help Center if agreeable; cross over 95 to Northwest, drive northward, pick-up at Emma and Northwest; cross I-90 (now on Ramsey Rd.), pick-ups at the Salvation Army Croc Center (thus servicing Fairwood, Trails End and Tree Top apartments) and Jenny Stokes Field; westward on Prairie, pick-up at Sunshine Meadows Park and/or Landings Park as needed.

From the North:

- Start at a convenient location in Rathdrum, drive northward on 41; 41 becomes 53 and turns eastward, pick-up (if needed) at 53 and Meyer; continue eastward, turn southward on Atlas; turn eastward on Lancaster; pickup at Croffoot Park; head southward on Government Way, turn westward on Miles, southward on Reed to Hayden; westward on Hayden, pick-up in the vicinity of Hayden and Atlas; southward on Meyer to the school.

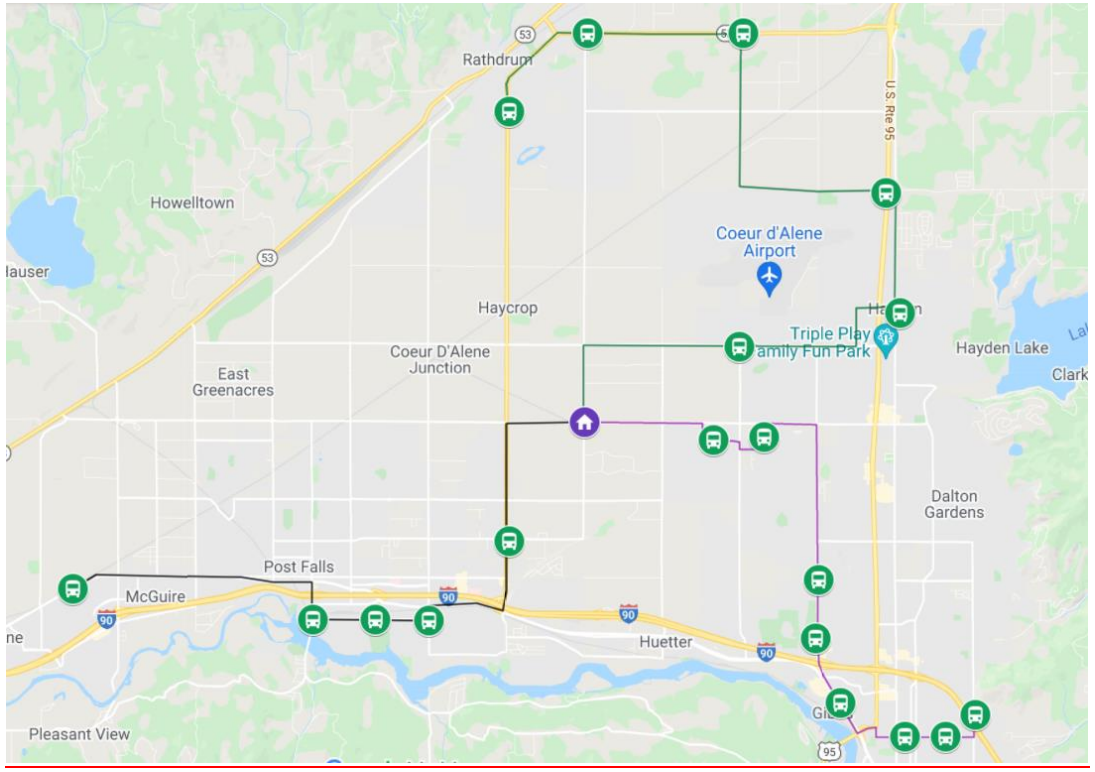


Figure 1: Proposed Bus Plan for Site 1

Section 3 – Board Capacity and Governance Structure

Description of Governance Structure

Kootenai Classical Academy will be a legally and operationally independent entity, established by the nonprofit corporation's governing board. The governing board will be legally accountable for the operation of the charter school. There will be no fewer than 5 and no more than 9 members on the governing board. The Board Officers will be President, Vice President, Secretary, and Treasurer. Each officer will be elected at the annual meeting and serve for one year. See Article ~~6~~VII of the KCA Bylaws for a complete description of the officers' roles. In general:

- The President of the Governing Board shall preside at all meetings and shall appoint committees with the approval of the Governing Board; shall have the right, as other members of the Governing Board, to make or second motions, to discuss questions, to vote; and may not act for or on behalf of the Governing Board without prior specific authority from a majority of the Governing Board to do so. Further, it is the President's responsibility to ensure that Governing Board members uphold their commitments and responsibilities to the school.
- The Vice President shall perform the duties of the President in the absence or at the request of the President. In the event a vacancy occurs in the presidency, the Vice President will act in the capacity of the President until the office has been filled by a vote of the Board membership.
- During the foundation period of the school the Treasurer may, at the request of the Board, deposit or disburse the funds of the Corporation ~~or~~and render an account of all transactions as Treasurer and of the financial condition of the Corporation. The Treasurer shall present an operating statement and report, since the last preceding regular Board meeting, to the Board at all regular meetings. Upon transition to a ~~Governing~~governing Board~~board~~, the Treasurer shall be familiar with the fiscal affairs of the school and keep the Governing Board informed in the event that the school's Business Manager is unable to so act. ~~The treasurer will~~and assist the ~~Governing~~governing Board~~board~~ with the oversight of the Corporation's financial management, ~~as well as~~ assist the Board in the development of financial policies and help ensure that financial performance aligns with ~~the~~board policy. See Article VI, 7.2(d) for more information regarding the authority and duties of the Treasurer.~~The Treasurer shall not be a signer on any account nor shall have any authority to approve or authorize transactions or have responsibility for the financial performance of the school.~~
- The Secretary shall keep the minutes of the Governing Board meetings, assure that all notices are given in accordance with the provisions of the Charter Governing Board policies and as required by law; shall countersign, when required, all authorized bonds, contracts, deeds, leases, or other legal instruments; and in general perform all duties incident to the office of Secretary and such other duties as from time-to-time may be assigned to the Secretary by the Governing Board.

The governing board may create one or more committees and appoint two members of the governing board, one to act as committee chair. Additional members of the committees need not be directors. Each committee may have two or more members, who shall serve at the pleasure of the full governing board. The provisions of the Bylaws which govern meetings, action without meetings, and quorum and voting requirements of the governing board, shall apply to committees and their members as well. [See Article XIII of the KCA bylaws for more information on committees.](#)

Kootenai Classical Academy commits to adhering to all federal and state laws and rules and acknowledges its responsibility for identifying essential laws and regulations and complying with them. This includes Idaho’s Open Meeting and Public Records laws.

See Articles [4-V, VI, VII, and VIII](#) of the KCA bylaws for additional details on the membership, authority, and powers of the governing ~~board~~ **Board**.

See Article [5-IX](#) of the KCA ~~Bylaws~~ **bylaws** for details on the ~~governing b~~ **B**oard meetings and open meeting laws.

Kootenai Classical Academy will function as a non-profit organization, organized and managed under the “Idaho Nonprofit Corporation Act,” as outlined in KCA’s Corporate Bylaws and Articles of Incorporation. Accordingly, the organizational flow chart representing the flow of information and the management structure is as follows:

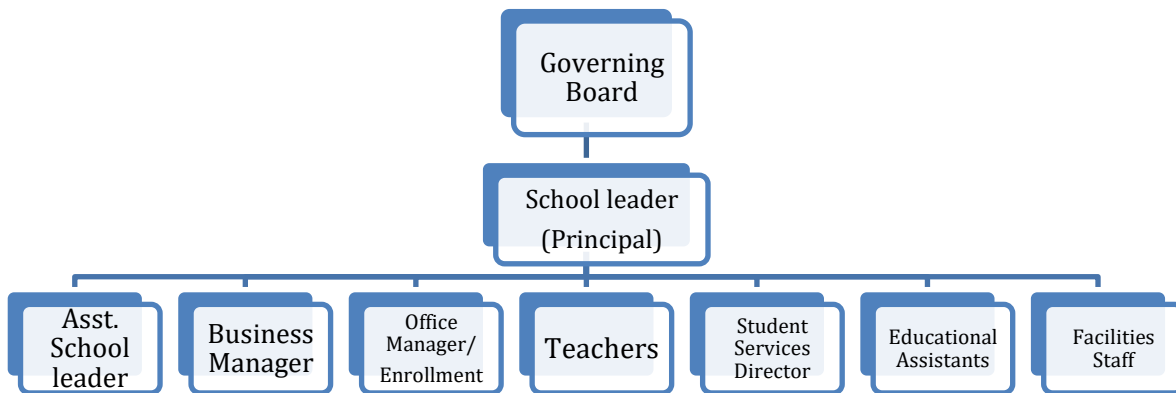


Figure 2: KCA Organizational Chart

(a) The ~~Governing Board~~ **of Directors:**

Kootenai Classical Academy shall be governed by ~~its Directors; as a body the Directors constitute the Board of Directors (hereafter referred to as “Board”).~~ ~~the KCA governing board and managed by its principal~~ **school leader pursuant to the school’s charter and duly adopted bylaws.** ~~Kootenai Classical Academy will be managed by its school leader pursuant to the school’s charter and duly adopted bylaws.~~ The main purpose of the ~~governing b~~ **B**oard is to ensure that the school accomplishes the outcome for which the school was chartered within all the pertinent parameters. The ~~governing b~~ **B**oard will be responsible for adopting policy, overseeing the management of the school and ensuring **compliance with financial procedures and policy compliance and responsibility.** In addition, the

governing board will ensure that the mission and goals of the charter are carried out by engaging in strategic planning in conjunction with the **principal school leader**. **Governing board** members will participate in fundraising activities as deemed necessary and appropriate by the Board. **Governing board** members will put the interests of the school first and refrain from using their positions for personal or partisan gain. The **governing board** will not be involved in the daily operations of the school, but will hire a **principal school leader**, *who will be evaluated at least annually*. The **governing board** will make sure the **principal school leader** manages KCA in compliance with the Idaho State Charter Schools law and all state and federal laws and regulations. The **governing board** will also perform ongoing assessments of the school and its programs and its operations. The **governing board** will serve as liaison between KCA and the school's authorizer.

The **governing board** will also routinely assess its own performance. **Governing board** members will participate in and develop short- and long-range plans for the school, also in conjunction with the **principal school leader**. The **governing board** will monitor the effectiveness of the school's programs and implementation to see if the school has met the goals outlined in the **plans charter**.

In an effort to build a strong network of community supporters, KCA may establish an "Advisory Board" to connect with individuals and organizations that can provide a pipeline for potential **governing board** members and assist with charitable donors.

Recommendations of new board candidates and elections of the **governing board** will be held in accordance with KCA Bylaws. As new **governing board** members are added, each will be provided an information packet which contains information pertaining to the responsibilities of a board member. The packet will include, but is not limited to, **governing board** member roles, state statute for charter schools, ethical standards, open meeting laws, school policies, financial reports, budgets, and other responsibilities. Each **governing board** member will have on record a signed copy of the Charter School Board Members Code of Conduct. Throughout the year, as decided by the board, there may be a training schedule to include, but not limited to, the roles/responsibilities of a governing board, review of the school's charter, review of Idaho school funding and financial audits, the governing board's ethical standards, and state statutes. As appropriate, the governing board will include other training such as the charter school board training seminars conducted at Hillsdale College. The KCA governing board will also attend the Charter School Boot Camp training offered by the Idaho State Department of Education in the Spring of 2022.

See **Articles V, VI, VII, and VIII** of the KCA bylaws for additional details on the membership, authority, and powers of the governing board.

(b) The **Principal School leader:**

The **principal school leader** reports to the governing board at regular meetings on matters concerning the school's operations and will be required to attend all governing board meetings. The **principal school leader** will ensure the charter school performs and accomplishes the outcomes for which the school was chartered and thus will be

responsible for the overall instructional and administrative leadership of the school, thus the planning, operation, and supervision of the educational program of the school, as well as the conduct and discipline of students and the formation of school culture. The [principalschool leader](#) shall have the responsibility for all personnel matters, including having the authority to hire, train, counsel, discipline, and, if necessary, terminate all school employees. The [principalschool leader](#) will periodically evaluate KCA employees as provided for by school policy. The [principalschool leader](#), in partnership with the entire governing board, will decide upon a periodic evaluation of the [principalschool leader's](#) performance.

The [principalschool leader](#) will establish and maintain an appropriate community relations program. The [principalschool leader](#) shall uphold and enforce the charter; KCA governing board policies; and local, state, and federal laws and regulations. Personnel under the supervision of the [principalschool leader](#), as identified in the charter, include the assistant [principalschool leader](#), student services director, business manager, administrative assistants/registrar/coordinator, and the teachers, educational assistants, and ancillary staff.

Founding Board Qualifications

The founding board consists of ~~seven~~ [eight](#) members who live in North Idaho. Two of the founding board members teach in higher education. They see that a stronger educational foundation is needed coming out of schools. Two board members have training as accountants and one is now working as a staff accountant at a firm that serves governments and non-profits. Two board members work in industry: one as an engineer for an aviation company, having served as a pilot in the military, the other as a senior machinist in the electronics industry. One board member has worked in finance and business administration in both public and private schools for two decades. [Two board members have been certified public school teachers. One member taught public school in Florida and has since](#) ~~One board member was a certified Florida public school teacher, has~~ homeschooled several of her children using a well-known classical model, and has set up campuses using that model. [The second board member taught public school in Montana and, more recently, in Idaho and currently maintains his own business in Kootenai County.](#) The board attended the Responsibilities & Obligations of Charter School Boards training sponsored by BLUUM in September of 2020. Please see Appendix D for the résumés of board members.



Figure 3: KCA Founding Board Skills "Flower"

Transition Plan

Once the charter is approved and all the management duties are transferred to the [principalschool leader](#), the board will transition to its role as a governing entity. The current founding board is seeking individuals who will fill any vacancies that may occur once the school is established and who have sufficient background and understanding of the mission and nature of the school. As per the bylaws, the board is seeking prospective board candidates to recruit, with the goal of having representation of the entire impact area of the school. The key element of the transition will be the delegation of the management duties to the [principalschool leader](#). The main purpose of the governing board is to ensure that the school accomplishes the outcome for which the school was chartered within all the pertinent parameters. The board will relinquish management focus, and the [principalschool leader](#) will lead the school to perform and accomplish the outcome for which the school was chartered.

Considerable time is delegated to the topic of how to avoid board micromanagement and what might be called “schizophrenia” in the three-day board training provided by Dr. Brian Carpenter as contracted by Hillsdale College. Additional material relating to the governing board’s role and responsibilities is provided by Dr. Carpenter as follow-up training after the seminar.

[It should also be noted there is a transition plan from founding to governance, and that this plan will be executed as soon as practicable after the school receives charter approval.](#)

This plan is summarized in the tables below and is designed to ensure a smooth transition from founding to governance in anticipation of school operations.

Table 3: KCA Founding Board Terms & Transition

<u>Position</u>	<u>Person</u>	<u>Term Ending</u>	<u>Notes</u>
<u>Founding Director 1</u>	<u>Ed Kaitz</u>	<u>August 2022</u>	<u>Transition to Director 1</u>
<u>Founding Director 2</u>	<u>Rachel Kaitz</u>	<u>~ Charter + 60 days</u>	<u>Anticipate resignation in July, 2021</u>
<u>Founding Director 3</u>	<u>Renee Burgess</u>	<u>August 2022</u>	<u>Transition to Director 2</u>
<u>Founding Director 4</u>	<u>Michael Burgess</u>	<u>~ Charter + 60 days</u>	<u>Anticipate resignation in July, 2021</u>
<u>Founding Director 5</u>	<u>Marcel LeBlanc</u>	<u>August 2022</u>	<u>Transition to Director 3</u>
<u>Founding Director 6</u>	<u>Kirsten LeBlanc</u>	<u>~ Charter + 60 days</u>	<u>Anticipate resignation in June, 2021</u>
<u>Founding Director 7</u>	<u>Ben Kettle</u>	<u>August 2022</u>	<u>Transition to Director 6</u>
<u>Founding Director 8</u>	<u>Erick Mack</u>	<u>March 2021</u>	<u>Replaced by Robby Miles</u>
<u>Founding Director 9</u>	<u>Robby Miles</u>	<u>August 2022</u>	<u>Transition to Director 4</u>

Table 4: KCA Governance Board Terms & Transition (Initial)

<u>Position</u>	<u>Person</u>	<u>Term Ending</u>	<u>Notes</u>
<u>Director 1</u>	<u>Ed Kaitz</u>	<u>August 2025</u>	
<u>Director 2</u>	<u>Renee Burgess</u>	<u>August 2024</u>	
<u>Director 3</u>	<u>Marcel LeBlanc</u>	<u>August 2023</u>	
<u>Director 4</u>	<u>Robby Miles</u>	<u>August 2025</u>	
<u>Director 5[†]</u>	<u>TBD</u>	<u>August 2024</u>	
<u>Director 6</u>	<u>Ben Kettle</u>	<u>August 2023</u>	
<u>Director 7</u>			
<u>Director 8</u>			
<u>Director 9</u>			

Section 4 – Student Demand and Primary Attendance Area

Enrollment Capacity

Kootenai Classical Academy plans to open in the Fall of 2022 with at least grades kindergarten (K) through six (6), but with a target of grades K through eight (8). There is ~~also~~ a strong demand for the higher grades, particularly seventh and eighth, among interested families, many with older children in these grades. Moreover, the founders and school leader currently assess there is sufficient demand to warrant an opening with grades seven (7) and eight (8), even if those grades have reduced class sizes ~~Whether to open with those grades depends on demand and the financial feasibility with regard to our facility.~~ (It must be stated that Idaho charter funding is very friendly to opening with somewhat smaller numbers in the higher grades).

Subsequent grade levels will be added each year as students advance. For a K-8 opening, ~~the~~ minimum number of students required to break even financially the opening year is ~~325~~ 235, which is approximately 1% of eligible school age children within the target area. KCA has, however, decided on an opening target of ~~428~~ 324 ~~for grades K–6~~, based on the current number of eligible school-age children within the target area and the increasing demand we are seeing from families. The school will be at capacity when the high school fills out and the total student body reaches 702 students as seen in the table below.

Table 5: KCA Enrollment Goals, 2022-2032

Grade	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
K	54	54	54	54	54	54	54	54	54	54
1	54	54	54	54	54	54	54	54	54	54
2	54	54	54	54	54	54	54	54	54	54
3	54	54	54	54	54	54	54	54	54	54
4	54	54	54	54	54	54	54	54	54	54
5	54	54	54	54	54	54	54	54	54	54
6	54 <u>27</u>	54 <u>27</u>	54	54	54	54	54	54	54	54
7	25	54 <u>27</u>	54 <u>27</u>	54	54	54	54	54	54	54
8	25	25	54 <u>27</u>	54 <u>27</u>	54	54	54	54	54	54
9		25	25	54 <u>27</u>	54 <u>27</u>	54	54	54	54	54
10			25	25	54 <u>27</u>	54 <u>27</u>	54	54	54	54
11				25	25	54 <u>27</u>	54 <u>27</u>	54	54	54
12					25	25	54 <u>27</u>	54 <u>27</u>	54	54
Total	428 <u>324</u>	482 <u>378</u>	536 <u>432</u>	590 <u>486</u>	644 <u>540</u>	673 <u>594</u>	702 <u>648</u>	702 <u>675</u>	702 <u>702</u>	702 <u>702</u>

The Hillsdale Barney Charter School Initiative model has found for the most optimum effect that each grade’s total student count should have a working goal of 54. The total is best divided into two sections of 27 students each. The advantages of this number are:

1. A class of 27 students is feasible to teach effectively given several key features of a good classical school. The school and classroom culture is one of decorum and order. The students are often self-motivated and strongly encouraged and guided by an engaging teacher. The curriculum is rich and robust and engages the students.
2. The class size remains short of the psychological barrier of 30 held by many parents and often teachers.
3. Although the standard maximum class size is 27, the class may exceed that number if one of the following happens: a student is retained at grade level (in which case all the students from the grade below can still advance); a student who is a twin or triplet gains a seat in the lottery, in which case the next seat would follow the sibling preference; or a faculty or staff member is hired who wishes to enroll his or her child in the school. Experience has shown that the number 27 allows for an added student or two in a class (four in the grade total) while keeping the number below the psychological barrier of 30.

Within rural area charter schools that provide a K through 12 education, Idaho State Department of Education data suggests that, when looking at the overall number of students per grade as they advance from grade 6 to 7, there is the possibility of an attrition rate of up to 35%. From grade 8 to 9 there is evidence of student attrition as high as 45%. Student attrition through the rest of the high school years appears to be between 25% to 30% and in middle school grades around 10%. With this information in mind as a more conservative forecast, the potential enrollment at Kootenai Classical Academy is reflected in the following table:

Table 6: KCA Potential Enrollment (based on rural attrition rates)

Grade	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
K	54	54	54	54	54	54	54
1	54	54	54	54	54	54	54
2	54	54	54	54	54	54	54
3	54	54	54	54	54	54	54
4	54	54	54	54	54	54	54
5	27 54	54	54	54	54	54	54
6	54 27	49 25	49	50	52	54	54
7	25	36 18	40 18	35	33	40	54
8	25	17	33 16	36 16	32	32	35
9		17	15	23 9	30 10	24	32
10			15	10	23 7	22 9	22
11				10	9	20 6	21 9

12					9	9	618
Total	324428	443367	476407	434488	458512	525489	560536

In addition to a strong academic program, the school will put much effort into forming a vibrant school culture and hosting extracurricular activities (such as student government) in which students themselves will sometimes be able to take the lead. Further, many sports programs will be offered and added as the school grows. The reputation of the school, both for its academics and strong school culture, will highlight the opportunities that KCA offers, which will bring in new families. Further, the formation of friendships within this unique school culture, particularly in the middle-school years, cannot be underestimated.

Experience has shown that schools following this model retain far more students in higher grades than the statistics cited above indicate. KCA also anticipates a growing, steady pool of K-5 students, as well as prospective families of younger children, as the school grows in reputation and proves to be a sound educational choice.

While we must be prudent in looking at these numbers, we should also take heart based on the experience of our fellow classical school, Treasure Valley Classical (which is designated a “rural” school). From 2020-21 to 2021-22, the school’s enrollment numbers are projected as:

- An overall retention rate of 97.4%
- 51 of 54 seventh-graders returning, or 94.4%, to enter eighth grade
- A waiting list of 200 students

Primary Attendance Area

The primary attendance area for Kootenai Classical Academy is the region including the four districts comprising Kootenai County: Coeur D’Alene School District #271, Lakeland School District #272, Post Falls School District #273, and Kootenai School District #274. The school may also attract a few students from Bonner County Districts #83 and #84.

The potential effect on the enrollment of the district schools is negligible. The initial projected enrollment of ~~428324~~ would, if the students all came from district schools, be less than ~~one two~~ and ~~one-half one-tenth~~ percent (~~12.51~~%). The far more likely scenario is that many of the students would come from home-schooling, private schools, ~~and a few from the~~ existing charters, and families new to the area. Further, the North Idaho area is experiencing significant growth, with many families coming from regions with substantial school choice. When the school reaches its capacity of just over 700 students, likely a decade from its opening, it would draw a maximum of just over three percent (3%), based on the enrollment counts of 2019-20. That number assumes completely stagnant growth of the four Kootenai school districts and all KCA students coming from district schools—both highly unlikely scenarios. Thus, the more likely effect of Kootenai Classical on the school districts’ enrollment is circa one percent (1%).

Table 7: KCA Worst-Case Impact on Kootenai County School District Enrollment

Kootenai County School Districts' Enrollment:	2019-2020	2020-2021	2022-2023†	2022-2023‡	2032-2033†	2032-2033‡
CDA School District #271	11,075	10,044	10,044	11,075	10,044	11,075
Lakeland School District # 272	4,590	4,330	4,330	4,590	4,330	4,590
Post Falls School District #273	6,175	5,837	5,837	6,175	5,837	6,175
Kootenai School District #274	142	152	152	142	152	142
Total Enrollment, all Kootenai County:	21,982	20,363	20,363	21,982	20,363	21,982
<i>Projected Enrollment of KCA :</i>			324 428	324 428	702	702
<i>KCA Potential Impact to Total Enrollment:</i>			12.6 1%	1.5 9%	3.2%	3.5%

† Assumes no return to pre-COVID-19 enrollment numbers and all KCA students come from other Kootenai School Districts

‡ Assumes a return to pre-COVID-19 enrollment numbers followed by no further growth, and all KCA students come from other Kootenai School Districts

For the purpose of these calculations, enrollment numbers for both the 2019 and 2020 school years have been used. The downturn in enrollment seen in 2020 is likely due to the impact of the ~~Covid~~ COVID-19 pandemic. In a post-~~Covid~~ COVID world, many of these students will return to district schools. Others, currently being homeschooled or in an online program, will only return to a school setting if it is a charter school, according to our demographic research (see below).

Demographics

~~“The number-one emerging property market in America is NOT in Texas or Florida. You may never have even heard of it.”~~

~~As the Wall Street Journal / Market Watch headline above attests, the story of the population of Idaho is one of growth. The story of the population of Idaho is one of growth. Although~~ In particular, the city of Coeur d’Alene – in the heart of Kootenai County – is the fastest growing city in the United States. Moreover, the same report ranked the city of Spokane / Spokane Valley fifth fastest growing. These two cities roughly define, respectively, the eastern and western boundaries of KCA’s primary attendance area. In late April ~~the official release of the~~ 2020 U.S. Census data ~~began to trickle in and, by all accounts, will not be until the end of March, all indicators are that~~ Idaho has become one of the fastest growing states in the nation. According to a recent article in U.S. News and World Report, anticipating the release of the census, Idaho has the highest population growth rate in the country, ahead of fast-growing states such as Arizona and Texas, as well as Idaho’s neighbors Montana and Washington. Further, United Van Lines’ annual National Movers Survey shows for the second year in a row that Idaho leads the country in residents moving in versus moving away. At 70%, “Idaho was the state with the highest percentage of inbound migration.” (unitedvanlines.com, 4 Jan. 2021)

North Idaho is a large part of that growth story. According to the Kootenai Metropolitan Planning Organization, it is likely that the county’s 2019 population of roughly 165,000

residents will almost double to over 300,000 over the next twenty years. Accordingly, the Idaho Transportation Department is working on improvements and expansion of major highways, particularly Hwy 53 and Hwy 41. (The Spokesman Review, 18 October 2020, “. . . Can Kootenai County Harness Growth that would put Population above 300,000?”

Just as transportation and other infrastructure will have to be improved and reassessed, so the growth of North Idaho will substantially increase the demand for schools and hence of school choice.

The following information is a summary of the most recent (2019) population ethnic and financial demographics of Kootenai County and three of its towns.

Table 8: Population Ethnic and Financial Demographics of Kootenai County

Town	Population	White	Hispanic	Other	Median Household income	Per Capita Income
Kootenai Cty	165,697	90.3%	4.9%	4.8%	\$54,457	\$29,429
Coeur D’Alene	52,414	88.5%	5.4%	6.1%	\$48,893	\$27,688
Post Falls	36,250	91.5%	4.9%	3.6%	\$51,521	\$24,172
Rathdrum	9150	90.1%	3.8%	6.1%	\$53,739	\$23,453

(US Census Bureau Quickfacts, www.census.gov/quickfacts)

This story of growth for North Idaho will no doubt translate to a greater demand for school choice. The BLUUM Foundation commissioned a survey by ECONorthwest, based in Portland, to see what impact this population growth might have on charters.* The conclusion was there “are growth opportunities for high quality charter schools” in Idaho. This general conclusion applies to the North Idaho region.

Specifically, there should be growth in the coming years of the school-age population for Kootenai County in both the K-8 and 9-12 age groups. In Coeur d’Alene alone, the number should range between 1350 and 2100 school-age children K-8 and another 250-500 high school students. From that cohort, 200-500 students are likely to enroll in charter schools.

Although not a town zeroed in on for the survey, Post Falls shows even greater potential growth in charter school students. That number ranges between 250 and 750 students.

Thus, taking the mean between these two towns, there is a potential growth of nearly a thousand students entering charter schools, to say nothing of the rest of the county. This survey was completed in June of 2019. Hence, the population growth of North Idaho resulting from the Covid pandemic does not figure in these statistics.

*ECONorthwest, “Idaho Charter School Growth Opportunities,” June 2019, commissioned by BLUUM, Communities of Excellence.

Community Needs and Market Interest

As per Idaho Code § 33-5202, one salient aspect of the legislative intent for charter schools is to “provide parents and students with expanded choices in the types of

educational opportunities that are available within the public school system.” There has sprung up a large public demand across the country for more educational choice, i.e. the desire for educational alternatives outside of the current educational models being exercised by the local school districts. In the words of long-time school reformer Chester Finn, “In the years ahead, we believe chartering should plant many seeds and cultivate many crops.” One of those seeds is classical education, particularly a classical education that cultivates well-informed human beings and citizens of good character. There is a strong demand for that crop to be cultivated in North Idaho.

Kootenai Classical vis à vis other Charter Schools

While it is true that there are other charter schools in North Idaho, as there are throughout the state, it must be stated that a classical school following this model would be a unique option for the families of this area. The demand for classical education, with particular emphasis upon American civic literacy and teaching of the moral virtues, is growing throughout the nation but is not currently met by any charter school in North Idaho.

Classical is not to be confused with “college prep” or “STEM” or “expeditionary learning,” which are the foci of the existing charter schools of the region. Further, Kootenai Classical will be a K-12 school, thus laying the foundation of learning and virtue in the earliest grades. While the school does expect to have most of its graduates attend college and excel there, as well as master mathematics and the sciences, schools following college-prep and STEM models employ a very different approach to teaching and learning and a vastly different way of describing their respective models, as should be evident from all parts of our program.

As stated earlier, the Evaluation Report held there to be two existing charter schools that, while not classical schools, are somehow close enough in mission and practices that the local area would be “saturated.”

The Commission should understand that all charters carry the flag of school choice, so none of the following is meant to serve as a critique of fellow charter schools. Yet there is considerable difference between the American classical model of Kootenai Classical and the schools to which the Commission must be referring, one a college-prep school with grades 7-12, the other a STEM school. These differences are highlighted in detail in the following pages, but we shall offer an outline of those differences below. The central point is that the parents who would choose to send their children to KCA would be very unlikely to send them to either a STEM or college-prep school.

• The mission and philosophy of a classical education, while assuredly meant to prepare students to flourish as individuals—hence to thrive in their further education and in their respective professions and careers—aims to cultivate knowledgeable and happy human beings and citizens. Based on the ideas of the Founding Fathers, who themselves inherited this tradition two millennia in the making, a classical, liberal education has in view both the

good of the individual and of our nation. To this end, we teach young people how to achieve that good using established and inspiring models of thought, action, and sacrifice.

• What students learn in school—whether in English grammar, literature, history, art, music, biology, geometry, Latin, et cetera—is not simply a means, whether a means to a higher grade or higher test score or getting into graduate school or making a higher salary. Rather, the vast array of what young people will learn at our school are ends in themselves and will serve as so many illuminations and colorings of their world—which result in both understanding and appreciation.

- The K-12 scope is essential to the mission of the school.
- Cultivating good character in young people is the twin mission of the school; indeed, much of the curriculum itself serves that end.
- The moral virtues we impart in youth extend beyond individual character traits but are truly public virtues.
- STEM schools, by their very nature, do not emphasize the humanities and arts. Classical schools do.
- College-prep schools, by their very nature, emphasize test scores and high-stakes testing. This model of classical school, while acknowledging that various tests must be taken, de-emphasizes the stress and culture of such testing. “Don’t sweat the tests” is the mantra of the founding school leader.
- Technology: while faculty and staff will clearly need computers in their admin roles (albeit in a limited role in teaching), students themselves will thrive on a no-tech/low-tech diet.
- Related to our teaching of character, the spirit of service will be taught both in the classroom and via the culture of the school.
- Whereas “all work and no play” makes Jack a dull boy (and Jill a dull girl), there will be a vibrant school culture that will feature extracurricular, after-school opportunities, thus making the KCA experience both manageable and fun.

Starting with an Upper School

The question has been raised of whether to start K-6 or K-8. The advantages of starting with upper-school grades are listed below, followed by legitimate concerns and responses to those concerns. It should be noted, first, that the founding school leader of KCA has founded three schools with the opening grades of K-11, K-8, and K-10, with marked success. Further, the Hillsdale Charter School Initiative has backed and encouraged schools starting with the higher grades except in cases where the student body will enter with very weak academic performance, usually accompanied by higher rates of poverty. The demographics of North Idaho do not fit that profile.

Advantages of beginning with an upper school:

- Entire families of children can be served rather than older siblings having to go somewhere else or be homeschooled in the higher grades.

- The more ambitious teachers both coming out of college and currently teaching are more attracted to a school with upper grades. Therefore, often teachers with stronger academic backgrounds (who will not even consider an elementary school when applying) can thus be recruited to the school. The founding school leader has a history of persuading some of these teacher candidates to start out teaching at the lower grades.
- In the founding years, truly pioneering students are attracted to the school who will be able to form important aspects of the school culture, to include: choosing the school's mascot; establishing a student government; starting various school traditions, such as school dances, theatre programs; starting programs that offer service to the school and the community; participate in school athletic teams that compete against other schools in the area, et cetera. Such activities contribute enormously to the esprit de corps of the school and lead to substantially increased retention and recruitment to the school in subsequent grades.

Perceived disadvantages of beginning with an upper school:

- The students are not academically ready. Coming into the school in the upper grades puts an enormous amount of pressure upon teachers, students, parents.
- Coming into a new school during adolescence will feel strange and put other kinds of pressure on young people.

Answers to those legitimate concerns:

- Every classical school in the initial years is in the remediation or "catch-up" business. Thus, the school needs to have good teachers who are well-trained, as well as a robust student services (SPED) team to help students with their various academic needs. These needs are well-known and will be met.
- Focusing on how students may be behind at a given grade (say, eighth) is looking at the matter from the wrong perspective. Any college professor who teaches freshman can attest that students coming into college are overwhelmingly not prepared. Thus, they, too are put in the remediation business. Every one of those professors would highly urge ("kill for" is not the right phrase) students to tackle more rigorous learning as soon as possible. The student who is "behind" in eighth grade will make significant progress at that level before going into high school, where he or she will continue to progress. Thus, the transition to college (where grades stay with you forever, and you are paying for it) is much smoother and more productive. Most students drop out of college because they are not ready. Let's get to them as soon as we can.
- No one should underestimate how much students can "catch up" and excel when they encounter truly great and interesting books and subjects and are given needed support in their learning. The human mind is much stronger and resilient than we often give it credit, particularly at that age.
- Very close friendships are formed at an age when students often find themselves "uncomfortable" in their own skin. These friendships motivate students to excel both academically and emotionally. This phenomenon is difficult to describe on paper, and

does not easily fit into a “rubric.” Yet this is often what parents care about most when their children are this age.

- Many of the students who will enter this school at the middle-school level will have had some experience with a classical curriculum, likely in home-schooling. Very often their desire (and their parents’) in coming to the school is to meet friends, be able to have vigorous classroom discussions with a higher number of young people, and be able to participate in the many aspects of school culture alluded to above.

Below we reveal our strategy and progress thus far in answering ~~that~~ the growing growing demand in the local area.

Chester E. Finn, Jr., Bruno V. Manno, Brandon L. Wright, “We Must Diversify Charter School Options,” *Education Week*, 23 August 2016.

Enrollment and Opening Strategy

The recruitment strategy of any classical school emanates from the philosophy and methods of the classical approach itself. It is to introduce parents (as their children will soon be) to “the Conversation.” Unlike STEM, college-prep, or career-directed schools that have an obvious connection to the concerns and promises of “college and career readiness,” classical schooling harkens back to a traditional way of learning traditional subjects. For today’s generation of parents, it is quite likely the form of education their grandparents (or great-grandparents) had, and one many are passionately committed to once they discover it. Yet the rather counter-cultural tone of classical education (limited use of technology, required study of Latin, etc.), combined with the high academic expectations, leads to many questions (“Can my children handle this?” “What will the colleges think?”) that must be answered satisfactorily before parents will commit their children to this kind of schooling. Those questions are best answered in an open dialogue with parents—typically in meetings both large and small. For that conversation to take place, parents and school leaders and founders must be able to meet—in person.

Due to the uncertainties related to Covid-19, particularly in the realm of public events and even personal meetings, the board of Kootenai Classical has decided the best strategy for launching the school would be to open in the Fall of 2022 rather than 2021, as had originally been planned. A large component of recruiting for a school following this model is starting “the Conversation” in the community through well-attended public meetings which involve question-and-answer sessions that paint a clear picture of the quality of instruction, the curriculum, and the demands placed on the students in a truly rigorous academic environment. Unfortunately, these informational meetings have been hard to come by in the midst of CDC restrictions. For example, the cancelling of the North Idaho State Fair in August, where the school had reserved a booth, cost the school exposure to hundreds of families that would have been interested in a classical charter school. Further, area libraries, another standard recruiting venue, have also been closed to public meetings.

Despite these obstacles, the board of KCA is confident that it can generate substantial interest in the school in an area of the state where demand for such an educational option is increasing. To this end, the KCA founders have implemented the following recruitment plan as it awaits the full reopening of public venues.

To the extent possible, introduce the school to local organizations still meeting, whether by video-conferencing or in person. The [principal school leader](#) of the school was able to begin this drive in in the Fall of 2020 by attending several public meetings

Set up both a school website and a social media page to inform prospective parents about the school and enrollment information.

Place flyers with information about the school in public areas throughout the county, to include coffee shops, grocery stores, fitness centers, and libraries This canvassing of the county may also include passing out flyers in neighborhoods, particularly in new housing developments with recent arrivals to the area. This campaign has been going on for some time and will start afresh with the coming of Spring and the reopening of public events.

Hold regular public information meetings informing prospective families about the school and answering various questions. There have been half a dozen of these meetings held in the meeting room at the Cabela's in Post Falls, the only affordable space available. (Normally, these meetings would be held in various local libraries.) The number of attendees at these meetings has grown.

Ask prospective parents to fill out the school's Expression of Interest form collecting contact information, number of students and their ages, current residence and plans for moving (if relevant), and questions regarding the school.

Further ask these prospective parents to fill out a demographic survey indicating, inter alia, their current schooling situation.

The latest data for these two sources of parent information are given below.

A large part of the recruiting has been and will continue to be done by the founding [principal school leader](#), Dr. Terrence O. Moore, who moved to this area in the fall of 2020 and is now a BLUUM fellow. Dr. Moore has been the founding [principal school leader](#) of three classical charter schools and was the lead architect of the Hillsdale Barney Charter School Initiative while also a professor in the history department (2008-2014) at Hillsdale. Dr. Moore is one of the leading advocates for classical education in the country, and his various writings have appeared in and on numerous newspapers, journals, and websites.

A number of the board have home-schooled their children and are well-connected with other home-schooling parents. The classical education movement has become especially popular with home-schoolers. Often these families do not intend to home-school all their children K-12, but are planning to go up to a certain grade or consider teaching at home "the best option for now." A strong outreach will be made to these families in Kootenai County.

Whenever a new type of school moves into a community, there is always the question, "Is this school for us?" or "Can our kids handle this?" As we have indicated above, there are more than two dozen schools across the country following this same model. Fortunately, Kootenai Classical has a model charter school closer to home. Treasure Valley Classical Academy in Fruitland, launched in 2019, is a Hillsdale BCSI school led by retired Air Force Colonel Stephen Lambert. Colonel Lambert was the Assistant Principal of the Atlanta Classical Academy (another Hillsdale BCSI school founded in 2014-5) for three years and

then Principal for one year before moving to Idaho. At Atlanta Classical he worked with Dr. Moore, who was the Principal for the first three years. The experience of just the past year and a half at Treasure Valley Classical has proven that there is a large demand for classical education in Idaho, that Idaho students (even those with lower test scores coming into the school) can thrive in this kind of school, and that such a school can weather impressively the challenges that Covid brought in the second semester (no doubt owing in no small part to Colonel Lambert's crisis management). Even though the Fruitland area is several hours' drive from North Idaho, word travels. Having a model in this state to point to will prove a tremendous resource in recruiting families. Further, those families who know they want to move to Idaho but have not decided where, can be more assured about their children's education, particularly when they have attended a classical school elsewhere, when they learn there is also a classical charter school in North Idaho. The recurring questions we get from people from out of state are, "Where will the school be?" and "When will you open?"

Increasing Demand

The changing demographics of North Idaho and the increasing demand for classical education in the charter school setting are validated by our expressions of interest and demographic surveys. Below are the results of those inquiries. As the numbers reflect, there is a growing interest as the school as more and more residents find out about it. We predict this demand will continue to increase, particularly when we can answer parents' number-one question, "Where will the school be?"

Completed "Expressions of Interest" Forms

__Kootenai Classical Academy developed an online Expression of Interest form as a means to gauge interest and demand for the school. As of May 6, 2021, 259 families have completed the online form, with another 82 families completing paper signup sheets. Altogether, this represents 341 families and community members and more than 543 potential school-age students. ~~As of March 16, 2021, 228 families have completed the online form, with another 82 families completing paper signup sheets. Altogether, this represents over 300 families and community members and more than 450 potential school-age students.~~

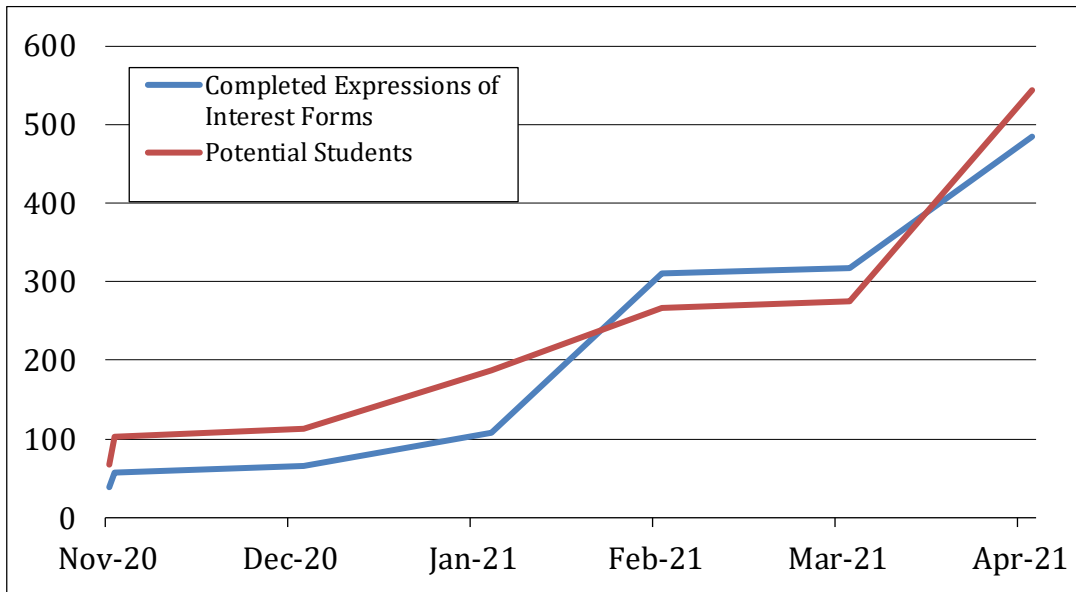


Figure 4: KCA Completed Expressions of Interest

Current Residence and School Choice

Kootenai Classical Academy also recently developed an online survey to assist the Board in determining the optimal location for the school as well as the possible impact on local school districts.

Of the survey respondents:

- 89.2% currently reside in Kootenai County
- 60.0% of those not currently residing in Kootenai County are planning to move to the area prior to Fall 2022
- Of those who live in the area, 51.5% ~~50.6%~~ of respondents live closest to Post Falls
- 38.6% ~~37.2%~~ of respondents' children are currently homeschooled
- Another 13.6% ~~22.1%~~ of respondents' children attend a virtual/online or private schools

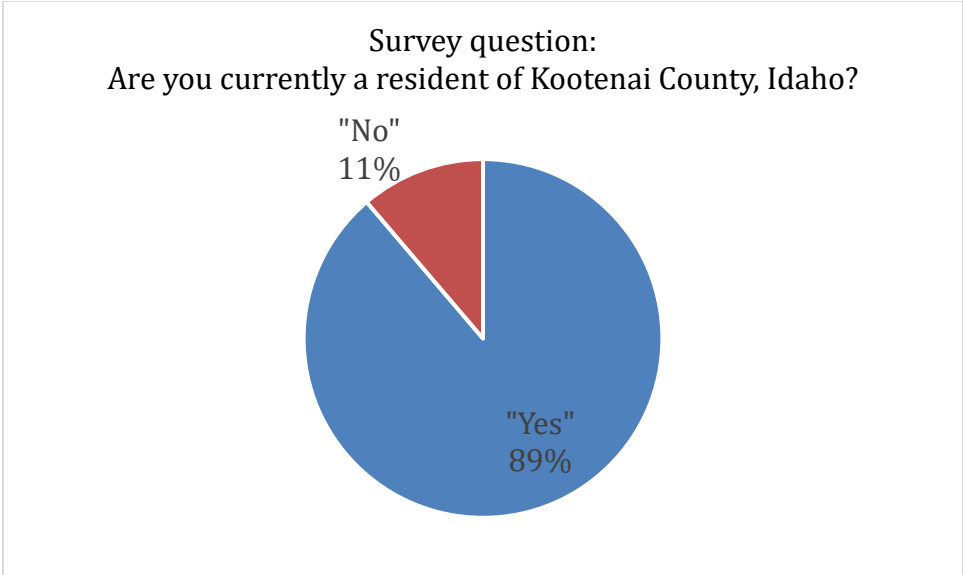


Figure 5: County of Residence, Potential KCA Families

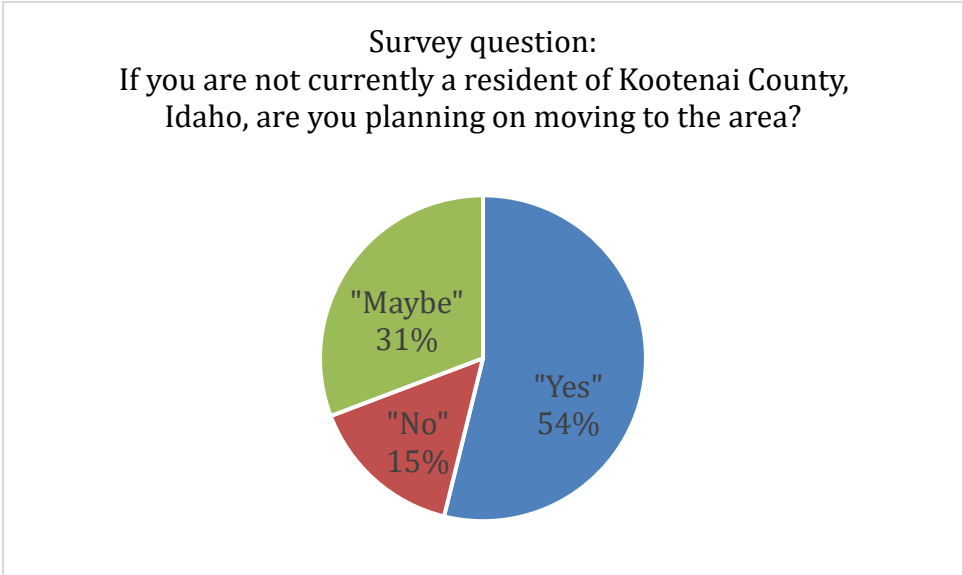


Figure 6: Intent to Move to Kootenai County, Potential KCA Families

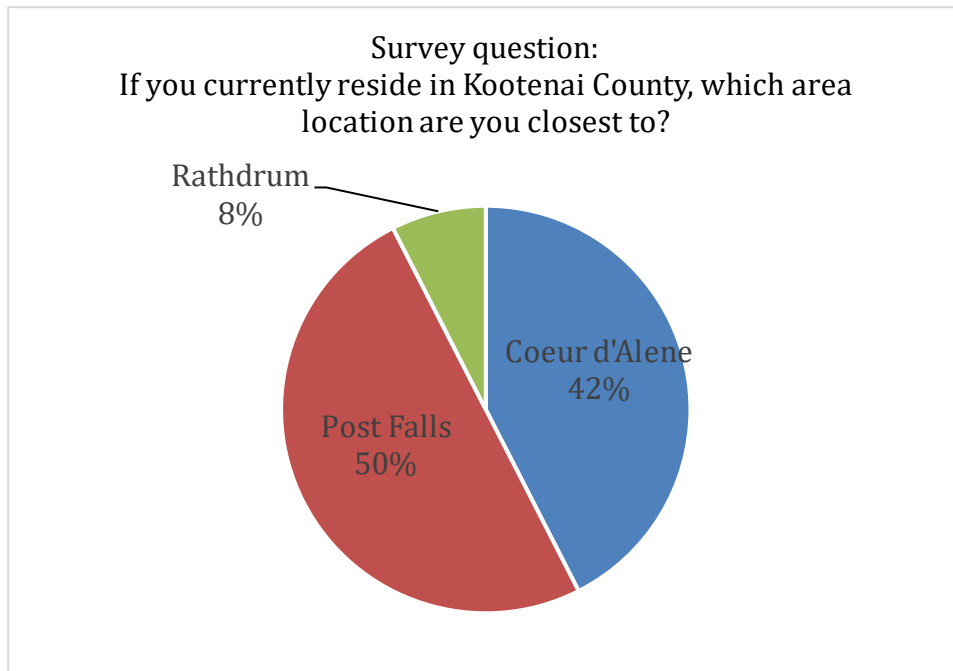


Figure 7: Location within Kootenai County, Potential KCA Families

Of respondents who have school age children, those children currently:

- Attend an area district school 22.7%~~29.1%~~
- Attend a private school: 15.9%~~10.5%~~
- Attend a charter school: 9.1%
- Attend a virtual/online school: 13.6%
- Homeschool: 38.6%

Total children not currently attending a district school: 77.3%~~70.9%~~

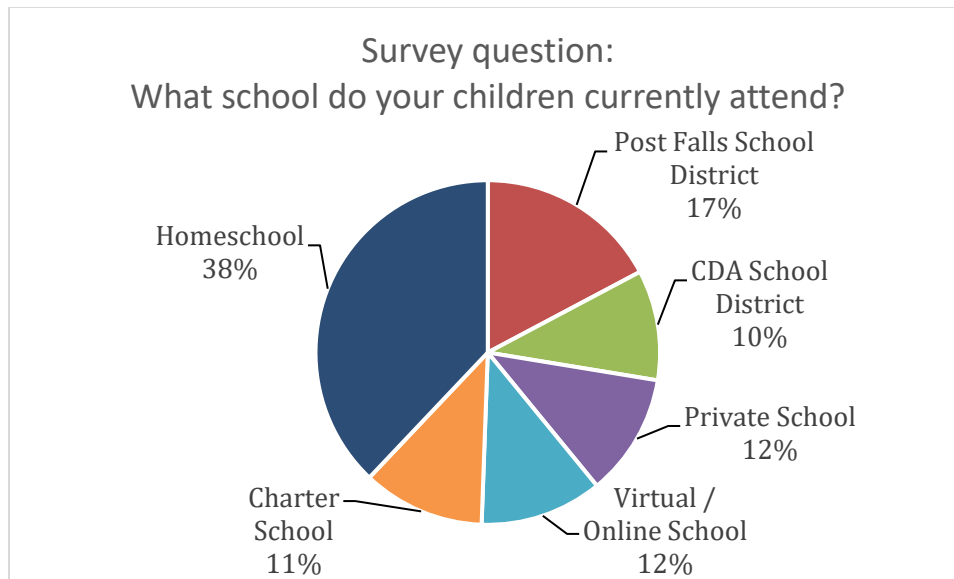


Figure 8: Current School Attendance, Potential KCA Families

One factor that will bring a large number of students to Kootenai Classical is a large and growing demand for training future citizens through a dynamic teaching of history, particularly United States history, and the related study of civics or government at all levels of the child's development. Our model of an American classical education places a great deal of emphasis on what has been called "the Great American Story," specifically, on the trials and heroic efforts of all Americans (men and women of all creeds and races) making good on the historic promise found in the Declaration, that "all Men are created equal." To this end, the school places a great deal of emphasis on both the history of our nation and a thorough understanding of our founding documents—The Declaration of Independence and U.S. Constitution. An American classical education model employs primary source documents combined with a reliable and engaging historical narrative to present and discuss the history of Western Civilization, the United States, and the legacy and trials of self-government left to us by the Founders. Further, the emergence of the U.S. as a world leader must also be taught for our children to understand the world they will inherit.

The Core Knowledge Sequence, in contrast to many classical education curricula, teaches some era of American history in every grade from Kindergarten through sixth grade. In seventh and eighth grades, an in-depth study of the twentieth century is offered, which offers a comprehensive coverage of both America's internal struggles and achievements and its relations to the rest of the world: World War I, the Great Depression, World War II, the Cold War, the Civil Rights movement, the Vietnam War, the end of the Cold War, etc. In addition, in the eighth grade, the history class spends an entire quarter on the Constitution. Thus, students know American history well leaving middle school and are able to go into much more depth when they study American history and government and economics in high school. Hence the curriculum lays the foundation necessary to form knowledgeable (and we hope responsible) citizens.

While this aside may seem to belong more in the section on our education plan, it cannot be emphasized enough that our ideas and practices of education are part and parcel of our recruitment. The civic spirit of our school appeals to a large number of Idaho residents. For example, such an emphasis on both civics and service, as in our teaching of the virtues, appeals to military veterans and their families. Idaho currently ranks fifth among states with a high percentage of veterans, with over 120,000, or 9% of the total adult population having served in the military.

Enrollment Lottery and Preference

Kootenai Classical Academy will follow enrollment procedures as outlined in IDAPA 08.02.04 Section 203. The children of full-time staff and the children of founders shall be given preference as allowed under Section 203.06, not to exceed 10% of the total student enrollment allowed for each school year.

Transportation Plan

Transportation to any school can be an important factor for attendance. Kootenai Classical Academy plans to offer transportation services for students in the primary attendance area as soon as it is financially possible based on enrollment numbers and the distance from the school to the location of students' homes. This desire is to ensure that lack of transportation will not negatively affect students for whom transportation may be a barrier to attendance. Bus routes and potential localized pickup points will be determined once enrollment is finalized. These services may be provided by a contractor or by the school. At the appropriate time, Kootenai Classical Academy will follow transportation bidding process per Idaho Code § 33-1510.

Based on the recent experience of Treasure Valley Classical in Fruitland, it is possible that a grant might be obtained to pay for a bus that would belong to the school. Thus prohibitive costs of private services would not interfere with the school offering bus transportation to its families. This avenue will be pursued in the coming months.

School Lunch Program

Kootenai Classical does not want the lack of an affordable lunch to be a barrier to students' attendance. Thus, the school will explore a number of options to ensure that students with financial needs will be able to eat a healthy lunch at no cost. One likely scenario for a charter school is that KCA will contract with a local food vendor that offers lunch at a reasonable price for those who wish to buy lunch. These services tend to serve about a quarter of the students on most days (with the rest bringing a sack lunch) and a much higher number on special days such as "Pizza Fridays." Very often these vendors have built into their cost-free lunches for those students who qualify for free and reduced lunch. Should a vendor not be able to meet all of the costs, it is also common for the school to have a discreet fundraiser to pay for students who cannot afford a school lunch.

In addition, KCA will investigate the means of enrolling in the National School Lunch Program (NSLP) and the Free and Reduced Lunch program (FRL). If KCA decides to participate, information to obtain free and reduced lunches will be gathered during the enrollment and registration process. Appropriate documentation will be gathered annually

and will meet the program requirements. If KCA joins the National School Lunch Program, all policies required by the program, including a wellness policy and guidelines regarding meals and snacks served at the school or school events, will be adopted.

Strategies for Enrolling Underserved Families

Kootenai County is composed of 31% single-parent homes (according to County Health Rankings), amounting to over 10,000 children; 5,668 children whose families are on food stamps (in 2020, according to kidscount.org); and 10% of the population living in poverty (U.S. Census for 2019). The largest racial minority in the county is Hispanic, at 4.9% of the total population. Poor or minority families are often underserved in many ways, to include educational opportunities.

Kootenai Classical intends to reach out to these families through information booths at community and local events; community presentations; advertising at local businesses, preschools, grocers, and food banks. The founding [principal/school leader](#) has met with the director of a local food bank, who has placed the school's flyer in a prominent place and talked to several parents of younger children who frequent the food bank. The school will also seek out persons in the Hispanic community who know parents who would be interested in and can spread the word about the school. KCA knows a fluent Spanish speaker who has translated our recruiting flyer into Spanish (see appendix), will soon be working on other literature produced by the school, and has offered to act as a translator in informational meetings for the Hispanic community. In all such recruiting meetings and other interactions, it will be stressed how a classical education in the American tradition is meant and designed for all citizens (or future citizens), and that the school's emphasis on mastering the basics—then building on that foundation—may be the best choice for their children. The [principal/school leader](#), who is originally from Texas, has both led and advised schools with a relatively high number of Hispanic students whose parents do not speak English. Several practices can be followed once the school is open that show even further how the school is the "right place" for their children, such as having a translator at parent-teacher conferences, someone in the front office who has at least a fair working knowledge of Spanish and can thereby answer quick questions (as can the [principal/school leader](#)), and making sure all important announcements, calendars, and other media are translated into Spanish.

The 2016 BLUUM report "Hispanic Parents Speak Out," composed of information compiled from Hispanic parents in eastern and southern Idaho who had opted to send their students to non-traditional public schools, highlighted features valued by the Hispanic population that are perfectly aligned with the structure and goals of Kootenai Classical Academy. Among those features:

- *"The Hispanic parents . . . interviewed prized a school that emphasized respect and good behavior. These were values they typically emphasized at home, and they wanted the school environment to reflect those priorities."*
- *"Parents typically responded well to school uniforms or a strict dress code because these communicated that a school was serious about student behavior. To some, there was an additional practical benefit – uniforms simplified the challenge of dressing youngsters."*

- *“Take pride in having good teachers that care about children and in the school’s preparation of students for college. Schools might also highlight specialized courses of study.” (FDR Group, 2016).”*

Each of these preferences aligns with KCA’s educational program, philosophy, and school culture.

It cannot be emphasized enough that the American classical model of education is open to all children. The legacy of the Founding Fathers in the field of education was, right as the nation was achieving independence, to extend what had been in European aristocracies a liberal education for mostly the sons of rich and influential families, to all Americans and, what was truly revolutionary—to their daughters (see Thomas Jefferson and Benjamin Rush documents listed above). The emphasis placed upon language enables students who may come from a different country or a family that struggles with language to master the English language far better than even most college graduates do today. Further, Hirsch’s idea of cultural literacy was originally and still is meant to overcome the barriers created for children of disadvantaged backgrounds who are not (to use a colloquial phrase) in the know when certain references are made and thus not able to participate fully in the culture. The goal of an American classical education is to build bridges—and to rebuild the burned or fallen bridges of our society—so that all Americans may have the opportunity and the will to flourish as human beings and as proud, responsible citizens.

Section 5: School Leadership and Management

The success flourishing of any school depends upon the abilities, hard work, and dedication to the mission of the leadership, staff, and teaching faculty. Obviously, the proof will be in the pudding. Yet Kootenai Classical already has several factors working towards its promise of becoming an outstanding school. First, the classical model of education itself is experiencing a Renaissance in this country, and thus attracting talented and dedicated people into its ranks. Second, the founding board members have an educational presence in this community that has been years in the making. Third, Hillsdale College and its model of an American classical education is known and appreciated in North Idaho. Fourth, the founding school [principal/school leader](#) has two decades of experience in this classical model and has hired the founding faculty for three different schools. Fifth, the astonishing movement of people to North Idaho brings teachers as well as students. In sum, there is every reason to think that a highly talented and dedicated leadership team and faculty will be attracted to this school which will serve our students and reflect well upon the state as a whole.

Below are the job descriptions for the school's leadership, student services, office staff, and teaching personnel. These job descriptions were taken from the employee policy manuals of several established classical charter schools, the policies of which would also be used to run the school. Further, these job descriptions are preceded by a model of an evaluation plan for the school's leader. While this may seem simply like a list of questions, these questions, followed by the job descriptions, indicate that the founding board and school leader know precisely what sort of people must be hired to lead and to teach in a school with this distinct mission and philosophy, and how to accomplish that mission. It all boils down to whether the best teachers can be hired to teach the best books in order to bring the best out of our students.

Board of Directors' Evaluation of the School's [Principal/School Leader](#)

Throughout the school year, there will be an ongoing conversation about the progress of the school between the Board of Directors and the [school's Principal/School Leader](#). No doubt, the board will have questions about how certain practices or policies are being implemented and any challenges the school faces along with signs of success. At the end of the academic year, the Board will conduct a formal evaluation of the [Principal/School Leader](#), drawing on several sources: an annual parent survey, an annual employee survey, general school visits by board members, as well as observation of faculty training and of classes, standardized testing results, enrollment numbers, the school's budget, and the [Principal/School Leader's](#) self-evaluation.

In order to evaluate the [Principal/School Leader](#) with the mission of the school chiefly in mind, the following questions will be considered. The [Principal/School Leader](#) may be required to answer these questions in a self-evaluation and given some opportunity to explain answers in a short narrative, rather than just a survey format. The Board should realize that the [Principal/School Leader's](#) evaluation of teachers and staff takes the form of a "conversation" very much in keeping with the philosophy of the school and, further, that the start-up year in particular is a very demanding and eventful effort wherein not

everything will run smoothly. “Improvise, adapt, and overcome,” is a phrase used in the Marine Corps and should likewise be understood by those establishing and running charter schools.

- Over the past year, did the school accomplish its mission?
- Are the teachers on the whole competent (preferably masters) in their disciplines, capable in their teaching and leading of children, committed to the mission of the school, eager to improve, and friendly?
- Did the [PrincipalSchool Leader](#) provide adequate training of and direction to the faculty?
- Did the [PrincipalSchool Leader](#) visibly act as the academic and intellectual leader of the school, both for teachers and for students?
- Have the students made substantial academic progress over the past year?
- Have they improved in character?
- Have they participated in and enjoyed school activities outside the school day?
- Did the [PrincipalSchool Leader](#) visibly act as a leader in promoting the school’s virtues and cultivating good character in the students?
- Did the [PrincipalSchool Leader](#) lead the way in shaping school culture and discipline? Is that culture and discipline evident in a simple “walk through the halls”?
- Did the [PrincipalSchool Leader](#) communicate with parents, to include supervising weekly notices of events, holding occasional talks on the mission and nature of the school, act as a presence during carpool, meetings, etc.?
- Is the school’s office staff helpful, competent, and friendly? (This responsibility may be given directly to the Assistant [PrincipalSchool Leader](#), though the [PrincipalSchool Leader](#) is always accountable.)
- Does the [PrincipalSchool Leader](#) clearly support the learning of all students? (Including those with disabilities and from disadvantaged backgrounds.)
- Were various “issues” handled with an appropriate amount of prudence and care?
- Is the overall morale of the school high? That is, do students enjoy going to school and the faculty enjoy teaching?
- Is the overall parent satisfaction with the school high? Are parents on the whole happy with the school, re-enrolling their children for the next year, and telling others about the school?
- Has the school stayed within budget in its operations and met financial goals?
- What is the enrollment projection for the coming year?
- What is the attrition rate of students? If rather high, why?
- What is the attrition rate of faculty and staff? If higher than expected, why?

In light of these and other questions, the Board’s evaluation should take the form of both a written document and a discussion during the executive session of a board meeting, preferably in the summer. If, however, the Board finds the [Principal School Leader](#) lacking in performance, the board should address any and all issues as soon as possible rather than waiting for the end of the academic year.

Kootenai Classical Academy will maintain a job description for each position in the School. These job descriptions are subject to change as the School grows and improves over time. The [Principal School Leader](#), in consultation with the BOD, may reallocate the responsibilities among the personnel and create new positions as necessary.

All employees—faculty, office staff, and administrators—are responsible for the education of students at Kootenai Classical Academy, which includes setting an example of high moral character and embracing the virtues of a free and just society.

Job Descriptions

[Principal School Leader](#)

General

The [Principal School Leader](#) is the Master Teacher and Chief Executive for the operation of the School, accountable to the BOD and ultimately responsible for the success of the education of the students in accordance with the principles set forth in the charter document. As leader of the School, the [Principal School Leader](#) must have high moral character and embrace the virtues of a free and just society.

The [Principal School Leader](#) shall:

- Implement the School’s mission, vision, and policies as set forth by the BOD
- Support the BOD in securing the School’s long-term interests
- Foster excellence and academic integrity
- Ensure sound management of the School

The following expands on the duties above:

Implementing the School’s Mission, Vision, and Policies

The [Principal School Leader](#) shall:

- Articulate the ideals of classical education among BOD, faculty, staff, parents, students, and the community at large
- Adopt and promote the vision, mission, and the principles of the charter
- Support and adhere to the agreements between the School and the Barney Charter School Initiative (BCSI), as adopted by the BOD
- Approve all curricular purchases and programs, based on guidance from the BOD and BSCI
- Ensure the virtues and duties of a free and just society are appropriately taught

- Ensure all extra-curricular activities uphold the mission and philosophy of the School
- Participate in annual professional development seminars offered through the Barney Charter School Initiative
- Keep informed of the current state of education in the State of Idaho and the nation

Supporting the School's Long-term Interests

The [Principal](#)[School Leader](#) shall:

- Promote the role of the School as a pillar of academic and character excellence in the community
- Protect the School from curricular alterations by ensuring that the curriculum and its delivery is academically sound and consistent with the philosophy of the School as set forth in the charter application, as well as guidance from BCSI
- Promote the School's autonomy to fulfill its mission and vision, including financial autonomy

Fostering Excellence and Academic Integrity

The [Principal](#)[School Leader](#) shall:

- Cultivate and reward student excellence
- Develop and promote character education
- Cultivate and reward excellence in teaching
- Plan for the academic and professional growth of faculty
- Teach one class and demonstrate mastery as a teacher, to set an example for faculty and students
- Develop himself or herself in accordance with the School's Core Virtues

Sound Management of the School

The [Principal](#)[School Leader](#) oversees the development and evaluation of faculty, staff, and students, as well as the prudent allocation of School resources.

School and Faculty:

The [Principal](#)[School Leader](#) shall:

- Recruit the best teachers to work for Kootenai Classical Academy
- Recommend new faculty and staff positions to the BOD
- Evaluate personnel performance
- Motivate and unify faculty and staff in a non-threatening environment
- Foster collegiality among faculty and staff
- Work closely with parent groups and committees

- Advise the BOD and Assistant ~~Principal~~School Leader regarding the management of physical resources
- Recommend corrective action to address recognized problems
- Facilitate communication among BOD, faculty, staff, parents, and students
- Ensure the professionalism of the faculty and staff
- Oversee creation of the student handbook in cooperation with the Board of Directors
- Inform registrar and the BOD of class offerings and teacher assignments
- Ensure that faculty are uniformly and consistently implementing the academic policies

Finances:

The ~~Principal~~School Leader shall:

- Set budget priorities in line with the school's mission
- Acquire general knowledge of the School's fiscal status
- Authorize expenditures in accordance with the annual budget
- Consult the BOD regarding extraordinary expenditures
- Oversee and approve teacher employment agreements
- Review monthly the ordinary administration of the School, and the implementation of budgets

Minimum Job Requirements

- Master's Degree in a related field, or an equivalent combination of education and experience
- Substantial classroom teaching experience
- Experience in educational management or administration
- Management/Supervision experience
- The ability to speak and write clearly and persuasively
- Unwavering commitment to and deep understanding of classical education
- Ability to oversee a classically-based curriculum

Other Desired Characteristics

- Knowledge of the Core Knowledge Curriculum
- Experience in or knowledge of charter or independent schools
- Previous K-12 education classroom experience

Assistant Principal

General

The Assistant Principal is accountable to the Principal.

The Assistant Principal is the authority in charge of

- Student discipline
- Supervision of non- academic programs
- Facilities
- Ancillary staff

As a leader in the School, the Assistant Principal must have high moral character and embrace the virtues of a free and just society.

The following expands on the duties above.

Student Discipline

The Assistant Principal shall:

- Enforce the School's policies and procedures for discipline, dress code, and attendance
- Foster strong relationships with students of every age and grade
- Rely on the School's Core Virtues in discipline
- Seek parental support for School policies
- Ensure that faculty are uniformly and consistently implementing disciplinary procedures.

Supervision of Non-Academic Programs

The Assistant Principal shall:

- Represent the School at various meetings and functions
- Oversee and/or administer standardized testing
- Develop and oversee the club and athletics programs in line with the School's classical mission, unless otherwise provided for by other staff.
- Oversee the security plan for the school
- Prepare a plan for remote learning in the event needed

Facilities

The Assistant Principal shall:

- Ensure the safety and cleanliness of the facility
- Ensure that classrooms that are appropriately outfitted for instruction
- Oversee building security, which includes the issuing of keys to staff and volunteers

- Seek out maintenance providers
- Ensure that parents, staff, and students, adhere to the established traffic procedures

Ancillary Staff and Non-Academic Duties

The Assistant Principal shall:

- Assign to staff and faculty non-academic duties approved by the [School Leader](#)
- Ensure that staff fulfill these duties
- Supervise part-time, non-teaching employees (including health techs and teacher aides)

Minimum Job Requirements

- Bachelor's Degree in a relevant field, or an equivalent combination of education and experience
- Experience in a supervisory role
- Ability to mediate difficult situations
- Experience working with students in sports or other non-academic activities
- Knowledge of business practices
- The ability to speak and write clearly

Business Manager (if applicable)

General

The Business Manager is accountable to the [Principal](#)[School Leader](#). (Note: the financial accounting for the school may be outsourced to a business services provider or provided by Bluum.)

The Business Manager shall maintain the School's financial independence.

Audit

- Ensure complete accuracy with the preparation, coordination, execution and reporting of annual financial audit
- Responsible for audit results and remedies
- Responsible for meeting District and State audit reporting timelines

Budget

- Provide BOD and [Principal](#)[School Leader](#) with actual costs for budget development
- Budget preparation, analysis and management
- Timely and accurate reporting on Month-End Close and associated report generation and distribution
- Long-term financial planning

- Oversee expenses as authorized by the [Principal](#)[School Leader](#) in accordance with the BOD-approved annual budget
- Oversee and ensure complete accuracy with all account payables and receivables

Charter School Law and Funding

- Responsibility for adherence to all charter school law and funding requirements
- Application, acquisition, budgeting, allocation, tracking and management for all bonds, grants, mill levy, and Title Funds
- Timely and accurately reporting to [Principal](#)[School Leader](#) and BOD with respect to above-mentioned funding

Contracts and Insurance

- Ensure School meets all Federal and State insurance and contractual obligations
- Ensure School complies with all Kootenai County insurance and contractual obligations
- Responsible for vendor interface

Human Resources – Benefits & Payroll

- Responsible for HR benefits acquisition, compliance, management and reporting
- Responsible for timely and accurate payroll management, distribution and reporting

Records and Reporting

- Oversee and ensure timely accuracy in the management and maintenance of all School financial records and financial databases
- Timely and accurate reporting with respect to all applicable District, State, and Federal requirements
- Timely and accurate reporting to [Principal](#)[School Leader](#) and BOD of all requested financial information, as well as any outstanding issues that would affect the financial standing of the school
- Provide special reports, as requested, to the BOD on an ad hoc basis

Supervision

- Ensure the proper training, job performance, and management of the bookkeeper, payroll clerk and any other applicable employees responsible for financial transactions and/or financial records (this includes any training/apprentice as designated by the BOD)
- Regular communication and training with Board Treasurer and/or other members interested in understanding the state of the School's finances

Office Manager/Enrollment Coordinator

(Note: This will likely begin as a combined position but over time branch into two.)

General

The Enrollment Coordinator is accountable to the [Principal](#) [School Leader](#).

The Enrollment Coordinator shall duly enroll each student.

Contact for New and Prospective Families

- Receive and return all communications from new or interested families within 48 hours.
- Guide prospective family visitations to classrooms
- On an on-going basis, meet with people who are interested in enrolling

Community Outreach

- Prepare and deliver informational presentations
- Ensure correct information regarding Kootenai Classical Academy to the community
- Ensure correct positive message to the community

Manages the lottery for every grade

- Draw lottery for all grades that are full
- Continually update student lottery for accuracy
- Save data for potential audit
- Ensure all classes are as full as possible

Creates and maintains class lists

- Processes teacher/admin recommendations
- Processes parent requests

Schedules elementary and junior high classes

- Oversees student data systems

Administrative Assistant

Kootenai Classical Academy will employ one or more Administrative Assistants to fulfill an array of responsibilities as needed. These responsibilities are distributed and shared throughout the office. Depending on the duties an Administrative Assistant is accountable

to the [Principal](#)[School Leader](#), Assistant Principal, or Business Manager. These duties are categorized as follows:

Accountability to [Principal](#)[School Leader](#)

- Compile, process, and maintain school records of students in a manner consistent with administrative, ethical, legal, and regulatory requirements of the Idaho Department of Education
- Process, maintain, compile, and report student information
- Develop school schedule for students, classrooms and teachers
- Compile and submit report cards for grades K-12
- Proficiently manage the grade book, including staff training and supervision
- Maintain confidentiality surrounding student records and information
- Work with the [Principal](#)[School Leader](#) to evaluate transcripts for new students to determine appropriate and equivalent awarding of credits and grade placement
- Communicate with the state to gather and/or provide information regarding programming in an effort to clarify course titles, program structures, grading scales, and scheduling models that affect the awarding of credits
- Maintain electronic school records and physical student files, including report card grades, immunization records, emergency card information, and student demographic information

Accountability to Assistant Principal

- Maintain health records
- Assist in the clinic
- Collaborate with school administration to prepare for, organize, and facilitate the new student registration process
- Track student attendance and truancy
- Coordinate and submit November and other student count reports to the state
- Accountability to Business Manager
- Bookkeeping
- Human Resources paperwork, organization, and records

Student Services Director

General

The Student Services Director is accountable to the ~~Principal~~ School Leader.

The Student Services Director shall:

- Ensure the mission of the School by overseeing the appropriateness of modifications and accommodations for students in specialized programming
- Oversee the education of students with IEPs, 504 Plans, and ALPs
- Assist and supervise general education teachers to meet individual students' educational goals for students with IEPs, 504 Plans, and ALPs
- Supervise and evaluate Student Services staff.
- Set budget priorities for the Student Services Department and have general knowledge of the Department's fiscal status.

The following expands on the four main areas of responsibility:

Ensure the Mission of the School for Students with Specialized Programming

In order to maintain the mission of the School, the Student Services Director shall:

- Remain faithful to the academic curriculum and character education in the School
- Understand the importance of the defined curriculum
- Ensure that modifications and accommodations are consistent with the School mission and philosophy while at the same time serving students with special needs
- Stress the importance of continued student progress both academically and behaviorally
- Demonstrate mastery as a teacher to students
- Develop the intellect of each student to the utmost of his or her ability
- Develop the personal character of every student
- Participate in annual professional development seminars offered through the Barney Charter School Initiative

Oversee Mandated Educational Processes

To ensure the proper services and supports for students who need supplemental programming, as well as to ensure that the school is in compliance with state and federal laws, the Student Services Director is expected to develop and/or oversee:

- Special Education support and services
- Section 504 Plans
- Advanced Learning Plans

Assist General Education Teachers with Implementing Specialized Programming

To ensure the proper services and supports for students who need supplemental programming, the Student Services Director shall:

- Educate school faculty and staff regarding students with disabilities
- Disseminate information regarding IDEA (Individuals with Disabilities Education Act) and ADA (American Disability Act), and any changes or updates to these laws
- Collaborate with teachers to maintain consistent communication regarding student needs
- Oversee the effectiveness of modifications and accommodations

Management of Student Services Department

The management of Student Services is to include the following to ensure appropriate direction to supplemental teaching staff and ensure progress for Kootenai Classical Academy's students:

- Direct supervision of Student Services Staff
- Collaborative work with the [Principal School Leader](#) to recruit and hire the best paraprofessionals, special education teachers, etc. for positions that will meet the individual needs of students
- Work under the authority of [state Special Education team]
- Definition and coordination of contracts for itinerant services (e.g., psychologist, speech therapist, occupational therapist, etc.) with the BOD
- Oversight of the effectiveness of the itinerant services
- Coordination of services and support to align with student needs
- Maintain consistent communication with teachers, parents, [Principal School Leaders](#), and BOD, as needed
- Management and monitoring of progress tracking within the school systems (SPED, ILP, etc.)
- Supervision of the Student Services secretary (if there is one)
- Close coordination with the enrollment coordinator regarding services for incoming students
- Ensure the confidentiality and professionalism of the faculty and staff with regards to students in supplemental programs
- Coordination of summer school programming

Minimum Job Requirements

- Bachelor's degree in a relevant and appropriate field as it pertains to student learning and development

- Familiar with special education laws and regulations regarding IDEA
- Have a special education license approved by Idaho Department of Education or be willing and able to obtain licensure
- Experience with students who need additional supports and services
- Management/supervision experience
- Ability to speak and write clearly
- Ability to oversee specialized programming

Other Desired Characteristics

- Master's degree in a brain-based field (e.g., occupational therapy, speech therapy, or school psychology) or an equivalent combination of education and experience
- Experience in educational management or administration
- Knowledge of charter or independent schools
- Interest in classical educational
- Interest in education reform
- Knowledge of the current state of education in the nation
- Previous K-12 education classroom experience
- Ability to adjust to the needs of the changing student population

Teacher

General

Teachers are accountable to the [Principal](#) [School Leader](#).

Adherence to Kootenai Classical Academy Mission and Philosophy

The teacher shall:

- Understand and adhere to the principles of classical education
- Develop the intellect of each student to the utmost of his or her ability
- Develop the personal character of every student
- Be highly-qualified in his or her discipline
- Participate in annual professional development seminars offered through the Barney Charter School Initiative

Knowledge of Academic Discipline(s)

- Upper School: Depth of understanding in one or more academic disciplines
- Grammar School: Breadth of understanding across the curriculum

Command of the English language

- Ability to speak lucidly and grammatically
- Ability to write lucidly and grammatically
- Ability to correct students in writing and in speaking

Teaching Abilities

- Ability to convey knowledge to young people
- Willingness to meet each child's academic needs
- Promotion of high academic standards
- Unrelenting desire to improve students' work
- Ability to engage all students in the discussion

Maintenance of Classroom Decorum

In order to maintain a classroom conducive to learning, teachers shall:

- Enforce the dress code
- Require students to speak in turn
- Prevent any student from disrupting the class by using the established disciplinary procedures
- Require students to be respectful to their teachers
- Insist that students are attentive and participatory
- Speak of and model character in terms of the School's core virtues
- Require each student to think of his or her good in relation to the good of the class and the School as a whole
- Tolerate no cruelty amongst and between students
- Be sensitive to problems as they are developing and intervene immediately

Maintenance of Good Parental Relations

- Respond within 2 days to parent emails
- Reach out to parents when their students are struggling or excelling
- Frequent communication with parents when necessary

Overall Attitude

- Loyalty to the school and its mission
- Willingness to take direction from the administration
- Collegiality

Other

- Punctuality and attendance
- Initiative and effort
- Professionalism
- Professionalism in appearance
- Attendance to other assigned duties

Minimum Job Requirements

- Bachelor's degree in a relevant field
- Demonstrated mastery of an academic discipline (upper school and specialists)
- Required credentials to teach in Idaho charter school
- Ability and willingness to teach a range of subjects (elementary)
- Ability and willingness to teach the Core Knowledge Sequence or High School curriculum as defined in the charter application
- Willingness to teach moral character in line with the school's core virtues
- Ability to speak and write clearly and effectively
- Conviction in the values of a rigorous liberal arts education
- Ability to maintain an orderly classroom

Other Desired Characteristics

- Previous teaching experience or experience working with young people
- A liberal arts education
- Experience with the Core Knowledge Sequence or higher liberal arts teaching
- Experience in or knowledge of charter or independent schools

Teacher's Aide

General

Teacher's Aides are accountable to the Assistant [Principal](#)[School Leader](#).

A Teacher's Aide supports the educational program in the classroom but does not represent the school in any official capacity. He or she may teach the students at the direction of the classroom teacher or [Principal](#)[School Leader](#), and report to the school's Assistant Principal. All teachers' aides shall:

- Support and supplement the educational program in the classroom, under a teachers' direction
- Research and gather resources and materials need for lessons.
- Contribute to the moral and intellectual environment of the school

- Work effectively with faculty and other staff as a team to improve the teacher’s instruction

Minimum Job Requirements

- High School Diploma or equivalent
- Demonstrated competence in reading, writing, and math

Desired Job Characteristics

- Bachelor’s degree

Hiring Teachers:

The Evaluation report states that “Finding qualified teachers is difficult for many new and existing schools in Idaho. Given that the petition states the school must hire only the best teachers, please explain how the school plans to recruit teachers that meet the requirements and whether this will impact surrounding schools and districts.”

While attracting teachers to a new school certainly requires much effort and is vital for accomplishing the mission of the school, the following advantages promise that Kootenai County will open its doors with a wonderful team of teachers:

- As we have indicated, classical education has grown rapidly over the last two decades in this country. While that means more schools competing for good teachers, it also means more students becoming teachers who have gone to a classical school or been homeschooled using a classical model over the last twenty years and then studied at a liberal-arts college.
- The founding school leader has hired faculties before in three different scenarios (please note that, in each case, the school leader hired an excellent first-year faculty, retaining 90% of the teachers into year two):
 1. early on in the classical movement, setting some of the practices of teacher hiring that are now standard (Colorado, 2001);
 2. attracting teachers to a state that had no classical schools (Georgia, 2014);
 3. hiring in a very competitive environment in a state that had led the way in classical schooling (Colorado, 2018).
- Hillsdale College’s efforts in K-12 education have become well-known, thus attracting the attention of prospective teachers. Several candidates from around the country have already contacted the school leader and when asked “How did you find out about Kootenai Classical?” have replied, “From the Hillsdale website.”
- The pull of North Idaho that is bringing new people to the area by the thousands brings teachers. Teachers move, too.
- Two founding board members and several other friends of the school have been teaching at the college level in North Idaho for a while. Unknowingly, they have been recruiting for this school. Many of their former star students are still living in the area and either are already, or could become, teachers.

- Teachers, particularly those in a classical school, can come from very different backgrounds. That is, they need not come straight from college or from a current teaching post. Second-career professionals can make great teachers, particularly those with expertise in certain academic disciplines, who have had careers in the service, or who have homeschooled their children. The founding school leader has had extensive experience in recruiting such teachers, including former military, lawyers, accountants, and Ph.D.'s who have taught at the college level. He has also hired at least two teachers (one to teach third grade) who went on to medical school and became doctors.
- Teachers want to be in a school where the mission is clear, learning is taken seriously, the students are attentive, their colleagues are genuinely interested in books and learning and are interesting people themselves, and where they will be respected for the hard and rewarding work they do. Sadly, not all schools live up to those expectations, and teachers are willing to move to one that does. Further, there are now many teachers out there with a pioneering spirit who would love to come to a new place and work tirelessly to help start a new school. Those are the kinds of teachers this school will attract.

Educational Services Provider

While many charter schools have successfully used an educational services provider in support of their mission, KCA founders do not have any intent to employ such services. Neither BCSI, BLUUM, nor any of the other organizations currently involved in KCA start-up efforts provide this type of support.

School Security and Emergency Programs

There are two plans or programs that simply cannot be overlooked in our time. The first is that of security. Schools must have a clear security plan that is understood and followed by teachers, students, and staff, as well as by parents and other visitors to the school. Much of school security depends on having the appropriate technology (alarms, cameras, etc.), but also on clear procedures that are followed by everyone associated with the school, from the teachers to the contracted lunch providers. The school administration will produce a security plan that will be presented to the board but also evaluated by an outside expert or another school leader with demonstrable expertise in that area to ensure that no aspect of security is overlooked.

Likewise, a clear program will be established for various forms of emergency: security breach, fire, weather-related dangers, and the like. In addition to a schedule of drills for these contingencies, the school will establish a program of communication with parents to notify them instantly of when drills take place in order to prepare for real emergencies. This form of communication will also be used for inclement weather.

The COVID-19 pandemic has challenged schools in their efforts to continue teaching and learning in the midst of lockdowns and social distancing. Thus, the school will develop a plan for how to respond to a similar crisis. This plan will explain how technology will be brought aboard, particularly for families who may have limited access to technology at

home, and what will be required of teachers in terms of instruction, student grading and participation, and somehow maintaining the semblance of a classroom.

In the opening year, attention will be given to which faculty or staff members (or even parent volunteers) are the most “tech-savvy” and thus could help others in meeting the demands of a transition to remote learning. In short, the school will prudently prepare for the worst while it practices to reach the best.

Summum Bonum

What follows is more detail on how we intend to accomplish our mission. What must be kept ever in view amidst these details is our mission and purpose, the reason we are bringing this petition to before the Idaho Public Charter School Commission: to bring the classics—the best that has been thought, said, done, and discovered—to the minds and hearts of the young people of Kootenai County, Idaho. We truly believe they deserve nothing less than the best.

KOOTENAI CLASSICAL ACADEMY

Appendix A: Budget and Facilities Options

A.1 Financial Summary

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:		325	428	482	536
	Pre-Operational Budget	Break-Even Year 1 Budget 2022-2023	Full Enrollment Year 1 Budget 2022-2023	Year 2 Budget 2023-2024	Year 3 Budget 2024-2025
Cash on Hand/ Other Revenue Sources	\$ -	\$ -	\$ 716	\$ 153,784	\$ -
Contributions/ Donations	\$ -	\$ -	\$ -	\$ -	\$ -
Loans	\$ 9,400,000	\$ -	\$ -	\$ -	\$ -
Grants	\$ 210,000	\$ 885,000	\$ 885,000	\$ 680,000	\$ 240,000
Base Support	NA	\$ 465,244	\$ 640,814	\$ 793,868	\$ 955,840
Salary and Benefit Apportionment	NA	\$ 1,126,567	\$ 1,531,166	\$ 1,902,790	\$ 2,304,458
Transportation Allowance	NA	\$ 94,575	\$ 124,500	\$ 145,200	\$ 161,475
Special Distributions	NA	\$ 289,130	\$ 348,401	\$ 447,457	\$ 491,508
Full-day Kindergarten Fees, Grant or Funding	NA	\$ 75,600	\$ 75,600	\$ 77,868	\$ 80,204
Federal Programs & NSL / FRL (Food Programs)	NA	\$ 154,900	\$ 203,700	\$ 244,918	\$ 259,120
REVENUE TOTAL	\$ 9,610,000	\$ 3,091,016	\$ 3,809,181	\$ 4,292,101	\$ 4,492,605
Expenditures					
	Pre-Operational Budget	Break-Even Year 1 Budget 2022-2023	Full Enrollment Year 1 Budget 2022-2023	Year 2 Budget 2023-2024	Year 3 Budget 2024-2025
Staff and Benefit Totals	\$ 144,784	\$ 1,565,581	\$ 1,909,814	\$ 2,438,042	\$ 2,646,792
Educational Program Totals	\$ -	\$ 183,775	\$ 254,683	\$ 345,129	\$ 261,510
Technology Totals	\$ -	\$ 180,025	\$ 217,375	\$ 86,800	\$ 117,800
Capital Outlay Totals	\$ -	\$ 46,175	\$ 58,298	\$ 11,025	\$ 5,180
Board of Directors Totals	\$ 2,500	\$ 27,875	\$ 27,384	\$ 29,346	\$ 29,908
Facilities Totals	\$ 9,400,000	\$ 641,200	\$ 648,100	\$ 809,330	\$ 814,600
Transportation Totals	\$ -	\$ 126,100	\$ 166,000	\$ 193,600	\$ 215,300
Nutrition Totals	\$ -	\$ 104,800	\$ 134,900	\$ 149,500	\$ 172,100
Other	\$ 62,000	\$ 31,500	\$ 56,500	\$ 49,150	\$ 50,850
EXPENSE TOTAL	\$ 9,609,284	\$ 2,907,031	\$ 3,473,054	\$ 4,111,922	\$ 4,314,040
OPERATING INCOME (LOSS)	\$ 716	\$ 183,985	\$ 336,128	\$ 180,179	\$ 178,565
PREVIOUS YEAR CARRYOVER		\$ -	\$ 716	\$ 336,844	\$ 517,023
NET INCOME (LOSS)	\$ 716	\$ 183,985	\$ 336,844	\$ 517,023	\$ 695,588

A.2 Pre-Operational Budget

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
Loans	\$ 9,400,000	See Facility Analysis.
Grants	\$ 210,000	Expected JKAFF grant support; please see appendix F.7, Bluum letter of support.
REVENUE TOTAL	\$ 9,610,000	
Additional Notes or Details Regarding Revenues: See detailed Facility Cost Analysis.		
Pre-Operational Expenditures		
Section 1: Staffing		
1a: CERTIFIED STAFF	Budget	
Other Certified Staff	FTE	Amount
Lead Administrator	1.0	\$ 95,000
CERTIFIED STAFF TOTAL	1.0	\$ 95,000
		Administrator Salary for 1 year
1b: CLASSIFIED STAFF	Budget	
Position	FTE	Amount
Office Manager	0.3	\$ 24,250
Receptionist	0.3	\$ 6,000
CLASSIFIED STAFF TOTAL	0.5	\$ 30,250
		Office manager hired from January to June, 2022, to assist with all startup, lottery and other t Receptionist for three months before July 1, 2022
1c: BENEFITS	Budget	
Type	Rate	Amount
Retirement	11.9%	\$ -
Workers comp	0.8%	\$ 939
FICA/Medicare	7.7%	\$ 9,582
Group insurance	10.4%	\$ 9,013
Paid time off (provide assumptions)	1.2%	\$ -
BENEFITS TOTAL		\$ 19,534
CERTIFIED & CLASSIFIED STAFF TOTAL	\$	125,250
TOTAL STAFF & BENEFITS TOTAL	\$	144,784

Section 3: Technology		
Line Item / Account	Budget	Assumptions / Details / Sources
All expenses start being recorded July 1 of Year		See estimate of pre-operational technology expenses included in miscellaneous expenses list
TECHNOLOGY TOTAL	-	
Additional Notes or Details Regarding Technology Expenditures:		
Section 4: Non-Facilities Capital Outlay		
Line Item / Account	Budget	Assumptions / Details / Sources
Furniture - Student	-	Incorporated into construction Budget
Furniture - Staff	-	Incorporated into construction Budget
CAPITAL OUTLAY TOTAL	-	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:		
Section 5: Board of Directors		
Line Item / Account	Budget	Assumptions / Details / Sources
Board Training	\$ -	Free resources to be used in pre-operational year.
Legal	\$ -	Legal fees relating to facility will be part of facility budget.
Insurance (property, liability, E & O, etc.)	\$ 2,500	Property insurance incorporated into facility budget. D&O and Liability for pre-op year.
BOARD OF DIRECTORS TOTAL	\$ 2,500	
Additional Notes or Details regarding Board of Directors Expenditures:		
Section 6: Facilities Details (consistent with facilities template)		
Line Item / Account	Budget	Assumptions / Details / Sources
Construction / Remodeling (if applicable)	\$ 9,400,000	See Facility Analysis. Facility will be constructed by Bouman USA, with financing provided by Round Table Funding
FACILITIES TOTAL	\$ 9,400,000	
Additional Notes or Details Regarding Facilities Expenditures:		
Section 7: Transportation		
Line Item / Account	Budget	Assumptions / Details / Sources
No costs in pre-op year.		
TRANSPORTATION TOTAL	\$0.00	
Additional Notes or Details Regarding Transportation Expenditures:		
Section 8: Nutrition		
Line Item / Account	Budget	Assumptions / Details / Sources
No costs in pre-op year.		
OTHER TOTAL	-	
Additional Notes or Details Regarding Transportation Expenditures:		
Section 9: Other Expenditures		
Line Item / Account	Budget	Assumptions / Details / Sources
Advertising / Promo	\$ 2,000	
Staff Recruiting Costs	\$ 7,500	
Web Design / Logos, etc	\$ 7,500	
Miscellaneous	\$ 25,000	See notes below regarding miscellaneous expenses
School General Office Supplies	\$ 20,000	
OTHER TOTAL	\$ 62,000	
Additional Notes or Details Regarding Other Expenditures: Miscellaneous expenditures are estimated as follows: \$5,000 to \$8,000 for technology and basic furniture for pre-operating staff, \$2,500 for SchoolMint or comparable enrollment lottery software, purchase or lease of office copier, possible early investment in PowerSchool program and training as well as food service management software, possible early contracting with food service specialists to ensure that the school food service program is operational on Day 1 of school operation.		

A.3 Three-Year Operating Budget and Break Even Year One Scenario

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:	325	428	482	536	
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Cash on Hand	\$0.00	\$716.00	\$153,783.50	\$305,902.50	Secured funds only; include documentation
Grants	\$ 885,000	\$ 885,000	\$ 680,000	\$ 240,000	Expected JKAFF Support.
Entitlement	\$ 465,244	\$ 640,814	\$ 793,868	\$ 955,840	Attach the M & O Revenue Template
Salary and Benefit Apportionment	\$ 1,126,567	\$ 1,531,166	\$ 1,902,790	\$ 2,304,458	Attach the M & O Revenue Template
Transportation Allowance	\$ 94,575	\$ 124,500	\$ 145,200	\$ 161,475	calc as 75% of cost (compared to IACS at based on IACS 80%, HCSS is 86%)
Special Distributions	NA	NA	NA	NA	From the SDE Special Distributions Doc.
Charter School Facilities	\$ 136,500	\$ 179,760	\$ 202,440	\$ 225,120	Per SDE budget guidance
Continuous Improvement Plans and Training	\$ 6,600	\$ 6,600	\$ 6,600	\$ 6,600	Per SDE budget guidance
Gifted Talented	\$ 3,546	\$ 3,719	\$ 3,810	\$ 3,900	Per SDE budget guidance
Leadership Premiums	\$ 19,314	\$ 22,363	\$ 27,446	\$ 29,479	Per SDE budget guidance
IT Staffing	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	Per SDE budget guidance
Professional Development	\$ 26,590	\$ 28,420	\$ 31,470	\$ 32,690	Per SDE budget guidance
Safe and Drug-Free Schools	\$ 5,705	\$ 6,879	\$ 7,495	\$ 8,110	Per SDE budget guidance
Technology (i.e. infrastructure)	\$ 66,875	\$ 76,660	\$ 81,790	\$ 86,920	Per SDE budget guidance
Math and Science Requirement	\$ -	\$ -	\$ 33,100	\$ 33,100	Per SDE budget guidance
College and Career Advisors/ Mentors	\$ 9,000	\$ 9,000	\$ 9,000	\$ 18,000	Per SDE budget guidance
School Facilities (Lottery)	NA	NA	\$ 29,306	\$ 32,589	
Full-day Kindergarten Fees, Grant or Funding	\$ 75,600	\$ 75,600	\$ 77,868	\$ 80,204	\$1400 Per Kindergartner, Annually
Food Service Support	\$ 108,200	\$ 142,200	\$ 163,200	\$ 185,200	Estimated at 100% of cost, as evidenced by IACS, HCSS, and currently Alturas K-8 School.
Title I	\$ 16,706	\$ 22,000	\$ 25,655	\$ 28,529	Based on average per pupil at IACS and FPS
Title II	\$ 3,417	\$ 4,500	\$ 5,248	\$ 5,836	Based on average per pupil at IACS and FPS
Title IV	NA	NA	\$ 10,000	\$ 10,000	Based on average per pupil at IACS and FPS
IDEA	\$ 26,577	\$ 35,000	\$ 40,815	\$ 29,555	Based on average per pupil at IACS and FPS
REVENUE TOTAL	\$ 3,091,016	\$ 3,809,897	\$ 4,292,101	\$ 4,492,605	

Operational Expenditures									
Section 1: Staffing									
1a: CERTIFIED STAFF	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Classroom Teachers	14.0	\$ 592,410	17.0	\$ 725,336	17.0	\$ 743,611	17.0	\$ 772,500	Based on detailed staffing plan
Elementary Teachers									
Secondary Teachers	3.0	\$ 130,464	3.0	\$ 130,464	8.0	\$ 359,052	10.0	\$ 462,500	Based on detailed staffing plan
Classroom Teacher Subtotals	17.0	\$ 722,874	20.0	\$ 855,800	25.0	\$ 1,102,663	27.0	\$ 1,235,000	Average classroom size:
Special Education	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
SPED Director	1.0	\$ 50,736	1.0	\$ 50,736	1.0	\$ 45,773	1.0	\$ 48,000	Two extra months year 1 (July/Aug) to intake Special Education Students and review docs.
Special Education Teacher	1.0	\$ 43,488	1.0	\$ 43,488	1.0	\$ 45,773	1.0	\$ 48,000	Based on detailed staffing plan
Special Education Subtotals	2.0	\$ 94,224	2.0	\$ 94,224	2.0	\$ 91,546	2.0	\$ 96,000	Anticipated % Special Education Students:
Other Certified Staff	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Principal	1.0	\$ 97,900	1.0	\$ 97,900	1.0	\$ 100,837	1.0	\$ 103,862	Based on detailed staffing plan
Assistant Principal	0.0	\$ -	1.0	\$ 60,000	1.0	\$ 61,800	1.0	\$ 63,654	Based on detailed staffing plan
Other Certified Staff Subtotals	1.0	\$ 97,900	2.0	\$ 157,900	2.0	\$ 162,637	2.0	\$ 167,516	
CERTIFIED STAFF TOTAL	20.0	\$ 914,998	24.0	\$ 1,107,924	29.0	\$ 1,356,846	31.0	\$ 1,498,516	
1b: CLASSIFIED STAFF	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Position	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Office Manager	1.0	\$ 48,500	1.0	\$ 48,500	1.0	\$ 49,955	1.0	\$ 51,454	Based on detailed staffing plan
Receptionist	1.0	\$ 24,000	1.0	\$ 24,000	1.0	\$ 24,720	1.0	\$ 25,462	Based on detailed staffing plan
Resource Room	0.0	\$ -	0.0	\$ -	1.0	\$ 35,000	1.0	\$ 36,050	Based on detailed staffing plan
Facilities Manager	1.0	\$ 35,000	1.0	\$ 35,000	1.0	\$ 36,050	1.0	\$ 37,132	Based on detailed staffing plan
SPED Para Pro	1.0	\$ 18,540	1.0	\$ 18,540	1.0	\$ 19,096	1.0	\$ 19,669	Based on detailed staffing plan
Teacher Assistant	2.0	\$ 27,810	2.0	\$ 55,620	4.0	\$ 57,289	4.0	\$ 59,008	Based on detailed staffing plan
Bus Driver	4.0	\$ 56,559	4.0	\$ 56,559	5.0	\$ 72,820	5.0	\$ 75,005	Based on detailed staffing plan
IT Director	0.0	\$ -	0.0	\$ 30,000	0.5	\$ 30,000	0.5	\$ 30,000	Based on detailed staffing plan
RTI Coordinator	0.0	\$ -	0.0	\$ -	1.0	\$ 35,000	1.0	\$ 36,050	Based on detailed staffing plan
Literacy Coordinator	0.0	\$ -	0.0	\$ -	1.0	\$ 35,000	1.0	\$ 36,050	Based on detailed staffing plan
CLASSIFIED STAFF TOTAL	10.0	\$ 210,409	10.0	\$ 268,219	16.5	\$ 394,930	16.5	\$ 405,880	
1c: BENEFITS	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	
Type	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	
Retirement	11.9%	\$ 134,374	11.9%	\$ 164,311	11.9%	\$ 209,162	11.9%	\$ 227,385	
Workers comp	0.8%	\$ 8,441	0.8%	\$ 10,321	0.8%	\$ 13,138	0.8%	\$ 14,283	
FICA/Medicare	7.7%	\$ 86,094	7.7%	\$ 105,275	7.7%	\$ 134,011	7.7%	\$ 145,686	
Group insurance	17.6%	\$ 197,760	17.2%	\$ 237,250	17.6%	\$ 308,934	17.4%	\$ 332,189	\$6500 per all FTE Incrementing 3% annual
Paid time off (provide assumptions)	1.2%	\$ 13,505	1.2%	\$ 16,514	1.2%	\$ 21,021	1.2%	\$ 22,853	
BENEFITS TOTAL		\$ 440,174		\$ 533,671		\$ 686,266		\$ 742,396	
CERTIFIED & CLASSIFIED STAFF TOTAL		\$ 1,125,407		\$ 1,376,143		\$ 1,751,776		\$ 1,904,396	
TOTAL STAFF & BENEFITS TOTAL		\$ 1,565,581		\$ 1,909,814		\$ 2,438,042		\$ 2,646,792	

KOOTENAI CLASSICAL ACADEMY

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Section 2: Educational Program						
2a: OVERALL EDUCATION PROGRAM COSTS	Break-Even 1 Budget	Year Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Professional Development	\$ 30,007		\$ 32,920	\$ 36,718	\$ 38,526	Using PD Funds from state & Title II
SPED Contract Services - IDEA	\$ 26,577		\$ 35,000	\$ 40,815	\$ 29,555	Assume use of IDEA Funds for this purpose
SPED Contract Services - General Fund	\$ 15,187		\$ 20,000	\$ 26,700	\$ 29,700	Estimated
Substitutes incl FICA, Medicare	\$ 5,315		\$ 7,000	\$ 8,000	\$ 9,000	Estimate based on TVCA experience.
Teacher Awards (leadership premiums)	\$ 19,314		\$ 22,363	\$ 27,446	\$ 29,479	Assume use of all Leadership Funds for teacher leadership/mentorship tipends
OVERALL EDUCATION PROGRAM TOTAL	\$ 96,400		\$ 117,283	\$ 139,679	\$ 136,260	

2b: ELEMENTARY PROGRAM	Break-Even 1 Budget	Year Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Elementary Curriculum	\$ 22,500		\$ 28,350	\$ 28,350	\$ 28,350	\$75 per student
Elementary Instructional Supplies & Consumables	\$ 30,000		\$ 37,800	\$ 37,800	\$ 37,800	\$100 per student for instructional material and testing supplies
Coaching Stipends	\$ 8,000		\$ 17,500	\$ 17,500	\$ 17,500	Same model as TVCA for sports.
ELEMENTARY PROGRAM TOTAL	\$ 60,500		\$ 83,650	\$ 83,650	\$ 83,650	

2c: SECONDARY PROGRAM	Break-Even 1 Budget	Year Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Title IV Student Enrichment	\$ -		\$ -	\$ 10,000	\$ 10,000	Use of Title IV for field trips and other enrichment opportunities
Secondary Curriculum	\$ 16,250		\$ 32,500	\$ 67,600	\$ 23,700	\$650 per student to start, then \$150 per student per year
Secondary Instructional Supplies & Consumables	\$ 10,625		\$ 21,250	\$ 44,200	\$ 7,900	\$425 per student to start, then \$150 per student per year
SECONDARY PROGRAM TOTAL	\$ 26,875		\$ 53,750	\$ 121,800	\$ 41,600	
EDUCATIONAL PROGRAM TOTAL	\$ 183,775		\$ 254,683	\$ 345,129	\$ 261,510	

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Section 3: Technology					
Line Item / Account	Break-Even Year 1 Budget	Year Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Internet Access	\$ 3,500	\$ 3,500	\$ 3,500	\$ 3,500	Estimate used from TVCA
Technology Software & Licenses - Powerschool	\$ 10,700	\$ 14,150	\$ 7,800	\$ 8,700	TVCA Y1 expense including implementation; TVCA Y2 expense, license only; then growth based on enrollment growth
Technology Software & Licenses - Schoolmint	\$ 6,825	\$ 6,825	\$ 9,100	\$ 10,100	TVCA year 1 expense, growth based on enrollment growth %
Technology Software & Licenses - Other	\$ 3,500	\$ 3,500	\$ 3,500	\$ 3,500	2m accounting software, other tools
Computers for Student Use	\$ 97,500	\$ 128,400	\$ 18,900	\$ 51,000	\$5,700 for Chromebooks and \$500 each for two carts to carry them.
Copier Lease/Contract	\$ 18,000	\$ 18,000	\$ 18,000	\$ 18,000	2 Copiers
Security System, Fire Alarm, Elevator Contract, M	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	Network, AP, phones, printers, and copier for admin.
Computers for Staff Use	\$ 19,000	\$ 22,000	\$ 5,000	\$ 2,000	\$1000 per teacher, refresh all tech year 5
IT Support Contract	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	Assume IT Staff Funding Used Here
TECHNOLOGY TOTAL	\$ 180,025	\$ 217,375	\$ 86,800	\$ 117,800	
Additional Notes or Details Regarding Technology Expenditures:					

Section 4: Non-Facilities Capital Outlay					
Line Item / Account	Break-Even Year 1 Budget	Year Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Furniture - Student	\$ 21,125	\$ 27,820	\$ 3,510	\$ 3,510	\$65 per added student for desk/chair, rest of furniture in facility budget.
Furniture - Staff	\$ 25,050	\$ 30,478	\$ 7,515	\$ 1,670	\$835 per new staff for desk and chair
CAPITAL OUTLAY TOTAL	\$ 46,175	\$ 58,298	\$ 11,025	\$ 5,180	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:					

Section 5: Board of Directors					
Line Item / Account	Break-Even Year 1 Budget	Year Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Board Training	\$ 6,600	\$ 6,600	\$ 6,600	\$ 6,600	Estimate of board travel costs to Boise as needed and to Hillsdale, Michigan for BCSI board training. BCSI training provided at no
Legal	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Audit	\$ 6,700	\$ 6,700	\$ 6,700	\$ 6,700	Per Quest CPA quote.
Authorizer Fee	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
Dues - ISBA - to access insurance plan	\$ 1,600	\$ 800	\$ 2,600	\$ 3,000	Per quote received from ISBA, discount Y1
Dues-ICSN	\$ 975	\$ 1,284	\$ 1,446	\$ 1,608	Budgeted at \$3.00 per student
BOARD OF DIRECTORS TOTALS	\$ 27,875	\$ 27,384	\$ 29,346	\$ 29,908	

Additional Notes or Details Regarding Board of Directors Expenditures:

Section 6: Facilities Details (consistent with facilities template)					
Line Item / Account	Break-Even Year 1 Budget	Year Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Mortgage or Lease	\$ 575,000	\$ 575,000	\$ 730,000	\$ 730,000	See facility analysis.
Grounds Maintenance	\$ 2,700	\$ 3,600	\$ 4,200	\$ 4,700	TVCA year 1 expense, growth based on
Other General Maintenance	\$ 2,500	\$ 2,500	\$ 2,600	\$ 2,700	
Janitorial	\$ 8,000	\$ 10,500	\$ 12,200	\$ 13,600	TVCA year 1 expense, growth based on
Utilities	\$ 41,000	\$ 41,000	\$ 42,230	\$ 43,500	48,000 sf @ \$0.85 / ft
Liability and Property Insurance	\$ 12,000	\$ 15,500	\$ 18,100	\$ 20,100	Based on TVCA rates.
FACILITIES TOTAL	\$ 641,200	\$ 648,100	\$ 809,330	\$ 814,600	

Additional Notes or Details Regarding Facilities Expenditures:

Section 7: Transportation					
Line Item / Account	Break-Even Year 1 Budget	Year Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Daily Transportation	\$ 126,100	\$ 166,000	\$ 193,600	\$ 215,300	Based on MOSAICS contract of \$1000/day from Caldwell Transportation, increased by enrollment increase percentage.
TRANSPORTATION TOTAL	\$ 126,100	\$ 166,000	\$ 193,600	\$ 215,300	

Additional Notes or Details Regarding Transportation Expenditures:

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Section 8: Nutrition Program					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Food Costs	\$ 104,800	\$ 134,900	\$ 149,500	\$ 172,100	Estimated based on food cost per pupil at HCCS and IACS
NUTRITION TOTAL	\$ 104,800	\$ 134,900	\$ 149,500	\$ 172,100	

Additional Notes or Details Regarding Nutrition Expenditures: KCA developed a detailed plan based on the experience of several schools including Idaho Arts and Future Public School. Both schools usually generate a small surplus, which is often used in future years.

Section 9: Other Expenditures					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Advertising / Promo	\$ 13,500	\$ 13,500	\$ 16,150	\$ 17,850	KCA expects to use multiple venues for advertising: flyers, radio, newspaper ads, etc. TVCA utilized annual billboard advertising with great success. In Fruitland and Payette, two billboards cost \$1,050 per month, we expect these costs to be higher in North Idaho. The increasing budget shown for advertising may be more than needed, it will be re-evaluated in future years.
Staff Recruiting Costs	\$ 7,500	\$ 7,500	\$ 7,500	\$ 7,500	Based on actual TVCA expense of \$7,433.27 in FY20, which was higher than initially budgeted, but reasonable considering that multiple staff members were hired from out of state, and TVCA paid travel costs for interviews. We expect our costs to be similar; the interview process includes a sample teaching session and other activities that require on-site visits.
Web Design / Logos, etc	\$ 500	\$ 500	\$ 500	\$ 500	Based on TVCA expenses
Miscellaneous	\$ 5,000	\$ 15,000	\$ 5,000	\$ 5,000	Placeholder
School General Office Supplies	\$ 5,000	\$ 20,000	\$ 20,000	\$ 20,000	Based on TVCA expenses
OTHER TOTAL	\$ 31,500	\$ 56,500	\$ 49,150	\$ 50,850	

Additional Notes or Details Regarding Other Expenditures:

A.4 Cash Flow Projection for Initial Operating Year

Idaho Public Charter School Commission														
Cash Flow Operational Year 1														
	Year 1	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	Total
Student Enrollment Capacity	Budgeted	428												
Revenue														
Donations and Contributions	\$ -													\$ -
Loans	\$ -													\$ -
Grants	\$ 885,000	\$ 885,000												\$ 885,000
Entitlement	\$ 640,814		\$ 320,407			\$ 128,163			\$ 128,163			\$ 64,081		\$ 640,814
Salary and Benefit Apportionment	\$ 1,531,166		\$ 765,583			\$ 306,233			\$ 306,233			\$ 153,117		\$ 1,531,166
Transportation Allowance	\$ 124,500		\$ 62,250			\$ 24,900			\$ 24,900			\$ 12,450		\$ 124,500
Special Distributions	\$ 348,401				\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 38,711	\$ 348,401
Full-day Kindergarten Fees, Grant or Funding	\$ 75,600			\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 7,560	\$ 75,600
Federal Programs & NSL / FRL (Food Programs)	\$ 203,700				\$ 20,370	\$ 20,370	\$ 20,370	\$ 20,370	\$ 20,370	\$ 20,370	\$ 20,370	\$ 20,370	\$ 40,740	\$ 203,700
Total Revenue	\$ 3,809,181	\$ 885,000	\$ 1,148,240	\$ 7,560	\$ 66,641	\$ 525,937	\$ 66,641	\$ 66,641	\$ 525,937	\$ 66,641	\$ 66,641	\$ 296,289	\$ 87,013	\$ 3,809,181
Expenditures														
Salaries and Benefits	\$ 1,909,814	\$ 8,000	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 158,485	\$ 316,964	\$ 1,909,814
Education Program	\$ 254,683	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,224	\$ 21,219	\$ 254,683
Technology Totals	\$ 217,375	\$ 217,375												\$ 217,375
Capital Outlay Totals	\$ 58,298	\$ 58,298												\$ 58,298
Board of Directors	\$ 27,394	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 2,282	\$ 27,394
Facilities	\$ 648,100	\$ 54,008	\$ 93,175	\$ 34,425	\$ 34,425	\$ 93,175	\$ 34,425	\$ 34,425	\$ 93,175	\$ 34,425	\$ 34,425	\$ 93,175	\$ 14,842	\$ 648,100
Transportation	\$ 166,000				\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 18,444	\$ 166,000
Nutrition	\$ 134,900				\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 14,989	\$ 134,900
Other	\$ 56,500						\$ 56,500							\$ 56,500
Total Expenditures	\$ 3,473,054	\$ 361,187	\$ 275,166	\$ 216,416	\$ 249,849	\$ 308,599	\$ 249,849	\$ 306,349	\$ 308,599	\$ 249,849	\$ 249,849	\$ 308,599	\$ 388,743	\$ 3,473,054
Cash Flow														
Operational Cash Flow	\$ 523,813	\$ 873,074	\$ (208,856)	\$ (183,208)	\$ 217,338	\$ (183,208)	\$ (239,708)	\$ 217,338	\$ (183,208)	\$ (183,208)	\$ (12,310)	\$ (301,730)	\$ (301,730)	\$ 336,128
Cash on Hand	\$ 716	\$ -	\$ 523,813	\$ 1,396,887	\$ 1,188,031	\$ 1,004,823	\$ 1,222,161	\$ 1,038,953	\$ 799,245	\$ 1,016,583	\$ 833,375	\$ 650,167	\$ 637,857	\$ 336,128
Cash End of Period	\$ 523,813	\$ 1,396,887	\$ 1,188,031	\$ 1,004,823	\$ 1,222,161	\$ 1,038,953	\$ 799,245	\$ 1,016,583	\$ 833,375	\$ 650,167	\$ 637,857	\$ 336,128	\$ 336,128	\$ 336,128

A.5 Facilities Options

<u>New Charter Petition Facility Option 1</u>						
<u>Location Address</u>	<u>Site 1, 15 Acres at W. Prairie Ave. and N. Meyer Rd</u>					
<u>Facility Information</u>	<u>Anticipate Move-In Date</u>	<u>8/1/2022</u>	<u>Facility Type</u>	<u>New Construction</u>	<u>Facility Status</u>	<u>Likely (board preferred site, actively pursuing)</u>
<u>Budget Location</u>	<u>Please indicate if this option is reflected as an expenditure in the budget template.</u> <u>Note: This option is reflected as an expenditure under Section 6, Facilities details</u>					<u>Break Even - Year 3 Budget</u>
<u>Vendor/ Developer/ Contractor Information (if applicable)</u>	<u>Company Name:</u>	<u>Bouma USA</u>				
	<u>Physical Address of Home Office:</u>	<u>3033 Orchard Vista Drive SE Suite 309, Grand Rapids, MI 49546</u>				
	<u>Website Address:</u>	<u>http://boumausa.com/</u>				
	<u>Company Contact:</u>	<u>Doug Bouma</u>				
	<u>Company Contact Phone Number:</u>	<u>(616) 682-6100</u>				

Additional Information – Facility Option 1

Please include any information pertinent to Facility Option 1 that is not already included in Section II (Finance and Facilities Plan) of the petition. Include attachments referenced here or throughout the petition in Attachment F. Links in the final PDF are appreciated.

Please see Project Costs, Sources and Debt Service, and Additional Information which follows.
See Figure 9: Proposed Site 1, 15-Acres at W. Prairie Ave and N. Meyer Rd

<u>Facility Option 1 - Details</u>		
<u>Please describe the costs involved with this option and the structure of any arrangements the school has made (or intends to make) in order to secure and sustain this facility option. Adjust descriptions and add columns as necessary.</u>		
<u>Description of Start-Up Costs</u>	<u>Cost Estimate (Refer to appropriate documentation in Attachments)</u>	<u>Responsible Party (Board or Name of Contractor)</u>
<u>Land purchase (if applicable)</u>	<u>1,545,000</u>	<u>Board / Bouma USA</u>
<u>Land development (include grading, utilities, etc.)</u>	<u>429,600</u>	
<u>Parking, curb, lighting (if applicable)</u>		
<u>Permits and applicable studies (as applicable)</u>	<u>150,000</u>	
<u>Delivery and set up of modular units (if applicable)</u>		
<u>Remodel estimate (if applicable)</u>		
<u>Other</u>	<u>115,000</u>	
<u>Total One-Time Costs</u>	<u>2,239,600</u>	
<u>Description of Lease/Rent/Purchase Plan</u>	<u>Details (Refer to appropriate documentation in Attachments)</u>	
<u>Annual Lease / Rent / Mortgage Payment</u>	<u>Mortgage Payment</u>	
<u>Lease term</u>		
<u>Interest rate</u>	<u>5.49%</u>	<u>Round Table Funding, Building Hope</u>
<u>Rate escalator (if applicable, please describe)</u>		

<u>In which operating year does the school intend to purchase (if option to purchase is applicable)</u>	<u>Choose an item.</u>	
<u>Capitalization rate at purchase (if applicable)</u>		
<u>Other</u>		
<u>Please include any additional narrative here.</u>		
<u>Please see Sources and Debt Service page</u>		

<u>New Charter Petition Facility Option 2</u>						
<u>Location Address</u>	<u>Site 2, 8 Acres at West Seltice Way and N. Pleasant View Rd</u>					
<u>Facility Information</u>	<u>Anticipate Move-In Date</u>	<u>8/1/2022</u>	<u>Facility Type</u>	<u>New Construction</u>	<u>Facility Status</u>	<u>Possible (research in progress)</u>
<u>Budget Location</u>	<u>Please indicate if this option is reflected in the Budget Template (Attachment A1-A4)</u>			<u>Break Even -Year 3 Budget</u>		
<u>Vendor/ Developer/ Contractor Information (if applicable)</u>	<u>Company Name:</u>	<u>Bouma USA</u>				
	<u>Physical Address of Home Office:</u>	<u>3033 Orchard Vista Drive SE Suite 309, Grand Rapids, MI 49546</u>				
	<u>Website Address:</u>	<u>http://boumausa.com/</u>				
	<u>Company Contact:</u>	<u>Doug Bouma</u>				
	<u>Company Contact Phone Number:</u>	<u>(616) 682-6100</u>				

Additional Information – Facility Option 2

Please include any information pertinent to Facility Option 2 that is not already included in Section II (Finance and Facilities Plan) of the petition. Include attachments referenced here or throughout the petition in Attachment F. Links in the final PDF are appreciated.

Building cost estimates are based on Site Option 1.
Please see Project Costs, Sources and Debt Service, and Additional Information which follows.
See Figure 10: Proposed Site 2, 5-Acres at W. Seltice Way and N. Pleasant View Rd

Facility Option 2 - Details

Please describe the costs involved with this option and the structure of any arrangements the school has made (or intends to make) in order to secure and sustain this facility option. Adjust descriptions and add columns as necessary.

<u>Description of Start-Up Costs</u>	<u>Cost Estimate (Refer to appropriate documentation in Attachments)</u>	<u>Responsible Party (Board or Name of Contractor)</u>
<u>Land purchase (if applicable)</u>	<u>1,700,000</u>	
<u>Land development (include grading, utilities, etc.)</u>	<u>429,600</u>	
<u>Parking, curb, lighting (if applicable)</u>		
<u>Permits and applicable studies (as applicable)</u>	<u>150,000</u>	
<u>Delivery and set up of modular units (if applicable)</u>		
<u>Remodel estimate (if applicable)</u>		
<u>Other</u>	<u>115,000</u>	
Total One-Time Costs	2,394,600	
<u>Description of Lease/Rent/Purchase Plan</u>	<u>Details (Refer to appropriate documentation in Attachments)</u>	
<u>Annual Lease / Rent / Mortgage Payment</u>	<u>Mortgage</u>	
<u>Lease term</u>		
<u>Interest rate</u>	<u>5.49%</u>	<u>Round Table, Building Hope</u>
<u>Rate escalator (if applicable, please describe)</u>		

<u>In which operating year does the school intend to purchase (if option to purchase is applicable)</u>	<u>Operating Year 1</u>	
<u>Capitalization rate at purchase (if applicable)</u>		
<u>Other</u>		
<u>Please include any additional narrative here.</u>		
<u>Please see Sources and Debt Service page</u>		

PROJECT COSTS

<u>Description</u>	<u>Comments</u>	<u>Phase I K10</u>
Land Acquisition		
Purchase Price		1,500,000
Due Diligence		45,000
TOTAL LAND		<u>\$1,545,000</u>
Soft Costs		
Architectural, Structural, MEP, Civil	Approx. 6% of Hard Costs	399,600
Due Diligence	Phase I, Traffic Study, appraisal, ALTA & survey	30,000
Construction Mgt/Owner Rep	Paradigm/Bouma USA	100,000
Permits and Fees	Building permit and review	50,000
Impact Fees	Sewer, power, water	50,000
Inspections		50,000
Builders Risk and General Liability		15,000
TOTAL SOFT COSTS		<u>\$694,600</u>
Hard Costs		
Square Footage		34,000
Per SF (excluding land development)		140
Total Building Costs		4,760,000
Land Development, including infrastructure		1,900,000
P&P Bonds (1% of Hard Costs)		66,600
TOTAL SOFT COSTS		<u>\$6,760,740</u>
Project Contingency	Overruns and unforeseen 5% of Hard & Soft	<u>\$367,730</u>
TOTAL PROJECT COSTS		<u>\$9,368,070</u>



KOOTENAI
CLASSICAL ACADEMY
an American Classical Education

Sources and Debt Service

Total Project to be funded	<u><u>\$9,400,000</u></u>
<u>Senior Debt - Tax Exempt Municipal Bonds</u> <i>RoundTable Funding (Financial Advisor) to facilitate an early stage municipal bond with an approx. TIC of 5.49% @ 35yrs</i>	\$8,400,000
<u>Subordinate Debt - JKAF PRI</u> <i>Building Hope has given tentative verbal commitments 3% amortized @ 30 years, 5 year call</i>	\$1,000,000
Total Sources	<u><u>\$9,400,000</u></u>
Estimated MADS (Max Annual Debt Service) <i>Includes Cost of Issuance, Capitalized Interest for the construction year and a step in year of \$575,000.</i>	<u><u>\$730,000</u></u>

Additional Information - Facility Option 1

Bouma USA and RoundTable Funding have provided KCA with the following preliminary budget:

1. Preliminary Design-Build Budget (not including land purchase price)
 - a. Phase One
 - 1) Size = 34,000 Square Feet
 - 2) Preliminary Budget = \$7,900,000
 - 3) Site size = 14 acres
 - b. Phase Two
 - 1) Size = 20,000 Square Feet
 - 2) Preliminary Budget = \$4,000,000

- 2 General Notes:
 - a. The preliminary budgets include:
 - 1) Design & Engineering
 - 2) Entitlement Process & Approvals
 - 3) Construction
 - b. This preliminary budget has been prepared based on a site that is already under contract by KCA.

New Charter Petition Facility Option 1						
Location Address						
Facility Information	Anticipate Move-In Date	8/15/2022	Facility Type	New Construction	Facility Status	Possible (research in progress)
Budget Location	The budget information copied into this document supports the numbers shown in the budgets.				Break Even Year 3 Budget	
Vendor/ Developer/ Contractor Information (if applicable)	Company Name:	Bouma USA				
	Physical Address of Home Office:	3033 Orchard Vista Drive SE Suite 309, Grand Rapids, MI 49546				
	Website Address:	http://boumausa.com/				
	Company Contact:	Doug Bouma				
	Company Contact Phone Number:	616-682-6100				

Additional Information – Facility Option 1

~~Bouma USA has provided Kootenai Classical Academy with the following preliminary budget:~~

At this time we are pleased to provide **Kootenai Classical Academy** with the following design/build goal:

1. Preliminary Design-Build budget (not including land purchase price)
 - a. Phase One
 - 1) Size = 32,000sf
 - 2) Preliminary Budget = \$6,800,000
 - 3) Site size = 10 acres
 - b. Phase Two
 - 1) Size = 20,000sf
 - 2) Preliminary Budget = \$4,300,000
2. General Notes:
 - a. The preliminary budgets include:
 - 1) Design & Engineering
 - 2) Entitlement Process & Approvals
 - 3) Construction
 - b. This preliminary budget is not site specific but based upon our experience developing Charter School projects in the State of Idaho.
 - c. From this point we will begin to further develop the preliminary budget for each property over the next 4 weeks and finalize the Level One process. Please see our Level One process that follows.

~~Additionally, based on current land costs in the area, and current construction costs per square foot, we have put together the following preliminary budget:~~

Total Project Cost	-	\$ 11,981,000
-	-	-
Primary Lender %	-	65.00%
Primary Interest Rate	-	4.50%
Second Lender %	-	35.00%
Second Lender Rate	-	3.00%
Calculated Blended Rate:	-	3.98%
Calculated Annual Debt Service:	-	\$ 758,060
-	-	-

DETAIL		
Facility Needs	Count	Sq-Ft
Classrooms x 900-sf	31	27,900
Additional classrooms x 900	5	4,500
Gym - 60 x 80 = 4800	1	4,800
Kitchen - 1500	1	1,500
Halls, etc. = 200 per room	36	7,200
Front office - 3000	1	3,000
Total square Feet	-	48,900
Project Cost per Bid	\$170/sf	\$ 8,313,000
FF&E	-	\$ 200,000
Origination	-	\$ 47,100
Legal	-	\$ 25,000
Appraisal	-	\$ 8,000
Project cost review	-	\$ 2,500
Title	-	\$ 3,000
Flood, etc.	-	\$ 500
Environmental	-	\$ 2,500
Capitalized Interest	-	\$ 50,000
Environmental Phase 1	-	\$ 2,300
Geotech	-	\$ 2,900
Traffic Study	-	\$ 7,250
Building Permit	-	\$ 20,000
Police Impact Fee	-	\$ 1,000
Fire Impact Fee	-	\$ 5,000
Fire Plan Review	-	\$ 5,000
Traffic Impact Fee	-	\$ 35,000
Construction Inspection	-	\$ 4,000
Planning and Zoning Application	-	\$ 2,800
Water and Sewer Connection Fee	-	\$ 40,000
Power Connection Fee	-	\$ 40,000

Insurance, Builder's Risk	-	\$ 10,000
Materials-Testing	-	\$ 10,000
Phones	-	\$ 19,400
Paging System	-	\$ 15,951
Access Control	-	\$ 8,094
Security/Cameras	-	\$ 8,458
Alarm System	-	\$ 2,195
Wiring for Doors (to be electrically triggered ahead of time)	-	\$ 2,339
Panic Alarm	-	\$ 1,511
Blinds	-	\$ 13,588
Blacktop	-	\$ 30,000
Exterior Access Point	-	\$ 2,000
Network Pulls—ERATE ELIGIBLE	-	\$ 41,000
Total Project Cost	-	\$ 8,981,386
Land estimate:	-	\$ 3,000,000
Grand Total Cost:	-	\$ 11,981,386

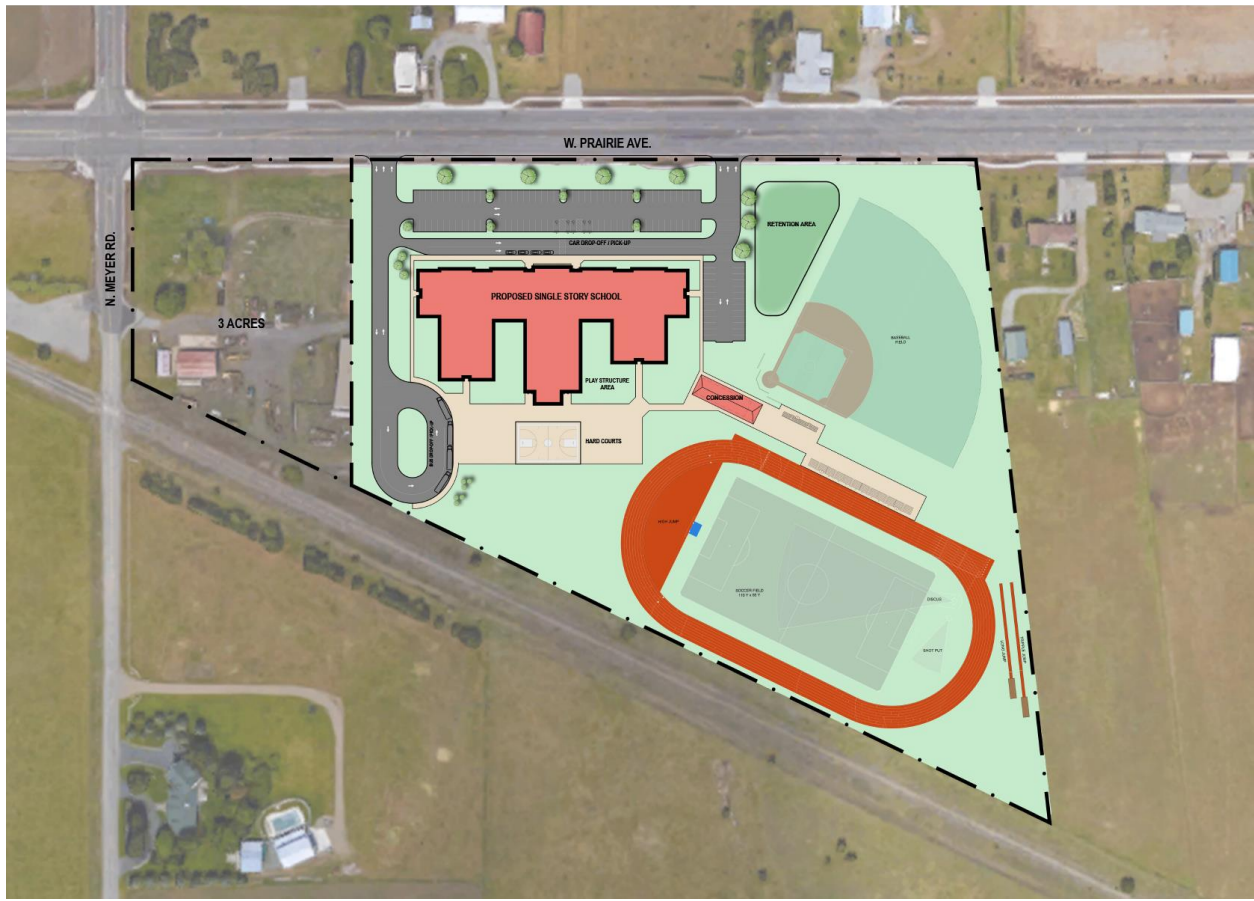


Figure 9: Proposed Site 1, 15-Acres at W. Prairie Ave and N. Meyer Rd

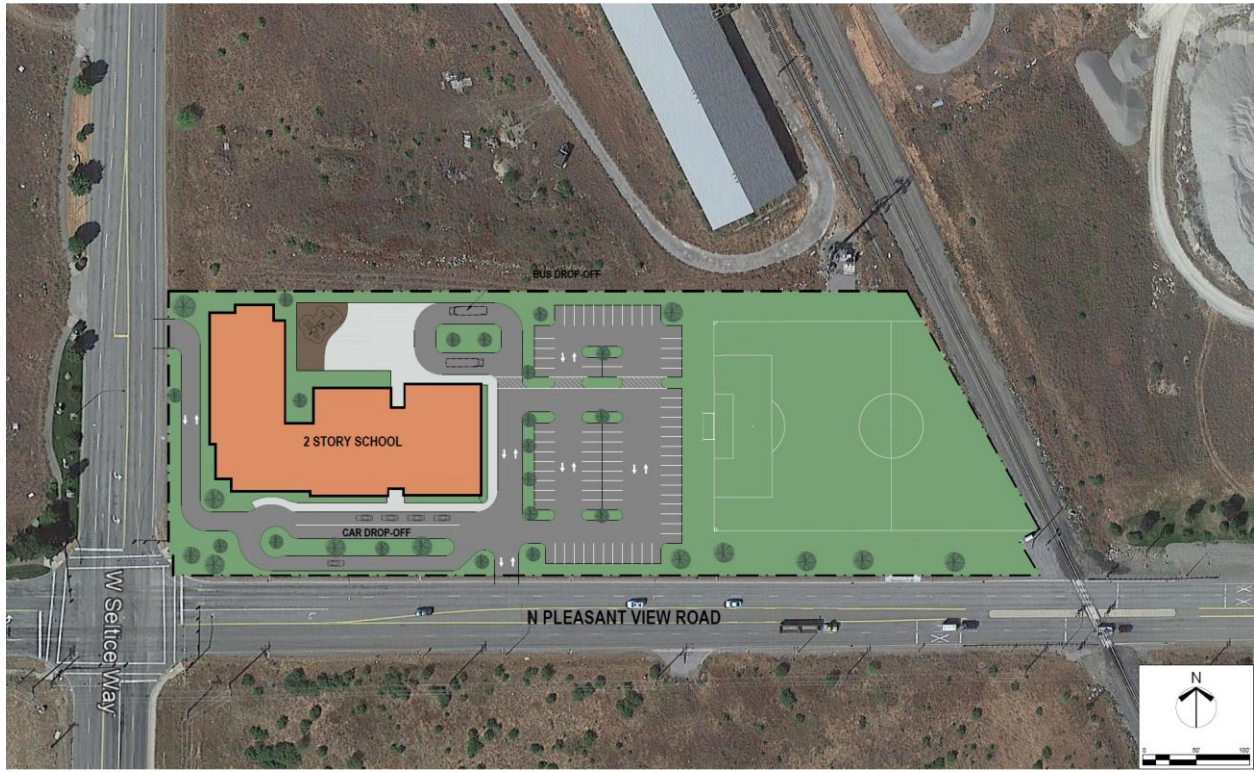


Figure 10: Proposed Site 2, 5-Acres at W. Seltice Way and N. Pleasant View Rd

2022-2023 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE

			<u>Rev Code</u>								
1 Number of Support Units (Best 28 Weeks ADA - Units)	15.29										
2 State Distribution Factor Per Unit	\$ 30,428										
3 Entitlement (line 1 x line 2)	\$ 465,244										
4 Salary Apportionment: 1st Reporting Period Units (From SBA Template)	15.29										
	<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">Administrative Index</th> <th style="text-align: center;">Average Instructional Salary</th> <th style="text-align: center;">Average Pupil Services Salary</th> <th style="text-align: center;">Total SBA plus Allowances from SBA Template</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.86980</td> <td style="text-align: center;">\$42,898</td> <td style="text-align: center;">\$42,898</td> <td style="text-align: center;">\$ 942,024</td> </tr> </tbody> </table>	Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template	1.86980	\$42,898	\$42,898	\$ 942,024		
Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template								
1.86980	\$42,898	\$42,898	\$ 942,024								
5 Estimated Base Support (line 3 + line 4)	\$ 1,407,269		431100								
6 Add: Benefit Apportionment	\$ 184,543		431800								
7 Add: Approved Border Contracts	\$ 0		431500								
8 Add: Approved Exceptional Child Support	\$ 0		431400								
9 Add: Approved Tuition Equivalency	\$ 0		431600								
10 Add: Transportation Allowance	\$ 94,575		431200								
11 Adjustments	\$										
12 Total Estimated SDE State Support (lines 5 + 6 + 7 + 8 + 9 + 10 + 11)	\$ 1,686,386										
 Revenue in Lieu of Taxes: (n/a for District Charters)											
13 Agricultural Equipment Tax Replacement Money from State Tax Commission	\$										
14 Personal Property Tax Replacement Money from State Tax Commission	\$										
Total Revenue in Lieu of Taxes (line 13)		0	438000								
*** RETURN THIS PAGE TO THE STATE DEPARTMENT OF EDUCATION ***											
School District Name:	KOOTENAI CLASSICAL ACADEMY	School District Number:									

2022-2023 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE

			<u>Rev Code</u>								
1. Number of Support Units (Best 28 Weeks ADA - Units)	21.06										
2. State Distribution Factor Per Unit	\$ 30,428										
3. Entitlement (line 1 x line 2)	\$ 640,814										
4. Salary Apportionment: 1st Reporting Period Units (From SBA Template)	21.06										
	<table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Administrative Index</th> <th style="text-align: center;">Average Instructional Salary</th> <th style="text-align: center;">Average Pupil Services Salary</th> <th style="text-align: center;">Total SBA plus Allowances from SBA Template</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.49330</td> <td style="text-align: center;">\$43,172</td> <td style="text-align: center;">\$43,172</td> <td style="text-align: center;">\$ 1,280,346</td> </tr> </tbody> </table>	Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template	1.49330	\$43,172	\$43,172	\$ 1,280,346		
Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template								
1.49330	\$43,172	\$43,172	\$ 1,280,346								
5. Estimated Base Support (line 3 + line 4)	\$ 1,921,160		431100								
6. Add: Benefit Apportionment	\$ 250,820		431800								
7. Add: Approved Border Contracts	\$ 0		431500								
8. Add: Approved Exceptional Child Support	\$ 0		431400								
9. Add: Approved Tuition Equivalency	\$ 0		431600								
10. Add: Transportation Allowance	\$ 124,500		431200								
11. Adjustments	\$										
12. Total Estimated SDE State Support (lines 5 + 6 + 7 + 8 + 9 + 10 + 11)	\$ 2,296,479										
Revenue in Lieu of Taxes: (n/a for District Charters)											
13. Agricultural Equipment Tax Replacement Money from State Tax Commission	\$										
14. Personal Property Tax Replacement Money from State Tax Commission	\$										
Total Revenue in Lieu of Taxes (line 13)		0	438000								
*** RETURN THIS PAGE TO THE STATE DEPARTMENT OF EDUCATION ***											
School District Name:	KOOTENAI CLASSICAL ACADEMY	School District Number:									

2023-2024 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE

		<u>Rev Code</u>								
1	Number of Support Units (Best 28 Weeks ADA - Units)	25.33								
2.	State Distribution Factor Per Unit	\$ 31,341								
3.	Entitlement (line 1 x line 2)	\$ 793,868								
4.	Salary Apportionment: 1st Reporting Period Units (From SBA Template)	25.33								
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Administrative Index</th> <th style="width: 25%;">Average Instructional Salary</th> <th style="width: 25%;">Average Pupil Services Salary</th> <th style="width: 25%;">Total SBA plus Allowances from SBA Template</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.54930</td> <td style="text-align: center;">\$44,489</td> <td style="text-align: center;">\$44,489</td> <td style="text-align: center;">\$ 1,591,095</td> </tr> </tbody> </table>	Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template	1.54930	\$44,489	\$44,489	\$ 1,591,095
Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template							
1.54930	\$44,489	\$44,489	\$ 1,591,095							
5.	Estimated Base Support (line 3 + line 4)	\$ 2,384,962	431100							
6.	Add: Benefit Apportionment	\$ 311,695	431800							
7.	Add: Approved Border Contracts	\$ 0	431500							
8.	Add: Approved Exceptional Child Support	\$ 0	431400							
9.	Add: Approved Tuition Equivalency	\$ 0	431600							
10.	Add: Transportation Allowance	\$ 145,200	431200							
11.	Adjustments	\$								
12.	Total Estimated SDE State Support (lines 5 + 6 + 7 + 8 + 9 + 10 + 11)	\$ 2,841,858								
<p>Revenue in Lieu of Taxes: (n/a for District Charters)</p>										
13.	Agricultural Equipment Tax Replacement Money from State Tax Commission	\$								
14.	Personal Property Tax Replacement Money from State Tax Commission	\$								
	Total Revenue in Lieu of Taxes (line 13)	\$ 0	438000							
<p>*** RETURN THIS PAGE TO THE STATE DEPARTMENT OF EDUCATION ***</p>										
School District Name: KOOTENAI CLASSICAL ACADEMY		School District Number:								

2024-2025 BUDGET WORKSHEETS
ESTIMATING M & O STATE SUPPORT REVENUE

			<u>Rev Code</u>								
1 Number of Support Units (Best 28 Weeks ADA - Units)	29.61										
2 State Distribution Factor Per Unit	\$ 32,281										
3 Entitlement (line 1 x line 2)	\$ 955,840										
4 Salary Apportionment: 1st Reporting Period Units (From SBA Template)	29.61										
	<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">Administrative Index</th> <th style="text-align: center;">Average Instructional Salary</th> <th style="text-align: center;">Average Pupil Services Salary</th> <th style="text-align: center;">Total SBA plus Allowances from SBA Template</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.60740</td> <td style="text-align: center;">\$46,138</td> <td style="text-align: center;">\$46,138</td> <td style="text-align: center;">\$ 1,931,386</td> </tr> </tbody> </table>	Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template	1.60740	\$46,138	\$46,138	\$ 1,931,386		
Administrative Index	Average Instructional Salary	Average Pupil Services Salary	Total SBA plus Allowances from SBA Template								
1.60740	\$46,138	\$46,138	\$ 1,931,386								
5 Estimated Base Support (line 3 + line 4)	\$ 2,887,227		431100								
6 Add: Benefit Apportionment	\$ 373,071		431800								
7 Add: Approved Border Contracts	\$ 0		431500								
8 Add: Approved Exceptional Child Support	\$ 0		431400								
9 Add: Approved Tuition Equivalency	\$ 0		431600								
10 Add: Transportation Allowance	\$ 161,475		431200								
11 Adjustments	\$										
12 Total Estimated SDE State Support (lines 5 + 6 + 7 + 8 + 9 + 10 + 11)	\$ 3,421,773										
 Revenue in Lieu of Taxes: (n/a for District Charters)											
13 Agricultural Equipment Tax Replacement Money from State Tax Commission	\$										
14 Personal Property Tax Replacement Money from State Tax Commission	\$										
Total Revenue in Lieu of Taxes (line 13)		0	438000								
*** RETURN THIS PAGE TO THE STATE DEPARTMENT OF EDUCATION ***											
School District Name:	KOOTENAI CLASSICAL ACADEMY	School District Number:									

Property 1— this is a 9 acre location at the corner of HWY 53 and Pleasantview Road. The location has several positive attributes. First, HWY 53 is a popular commuter artery that connects the west side of Post Falls and Eastern Washington to the city of Rathdrum, and further north to the city of Spirit Lake. HWY 53 will soon be widened to four lanes as well. Secondly, residential development in that area is growing fast, and residents who live in Post Falls will be able to commute to this location via HWY 41 or Pleasantview Road. For Rathdrum residents the school location is an easy trip down HWY 53, and for Coeur d'Alene/Hayden residents the school can easily be accessed from HWY 53 or from one of the many direct arteries that cross the prairie between Coeur d'Alene and Post Falls. Third, the property out in this area is currently less expensive than the property in the prairie along HWY 41. Fourth, this location is located a good distance away from any of the other schools in the area, including STEM Charter in Rathdrum and Coeur d'Alene Charter Academy in Coeur d'Alene, thus relieving any concerns about concentrating the local charter schools too close together.

Property 2— ideally this location would be a 15-acre parcel near the corner of Pleasantview Road and Poleline Avenue. The seller is parceling off this land in 5-acre parcels. Currently we are in negotiations with the real estate agent to possibly purchase 3 of these parcels. Again, this location has several positive attributes. First, it is much closer to HWY 90, which would make the commute from Post Falls and Coeur d'Alene much easier and faster. Second, similar to Property 1, the land out in this area is much less expensive. Third, this area also lies on the western side of Post Falls and therefore is plenty of distance away from the other schools in the area, and especially from the other two charter schools in the area – STEM Charter in Rathdrum and Coeur d'Alene Charter Academy in Coeur d'Alene. Lastly, residential development is growing fast between eastern Washington and the western side of Post Falls, and KCA will naturally draw many students from families who will be moving into these homes.

Appendix B: Articles of Incorporation and By-Laws

B.1 Articles of Incorporation



0003678565



STATE OF IDAHO
Office of the secretary of state, Lawrence Denney
ARTICLES OF INCORPORATION (NONPROFIT)
 Idaho Secretary of State
 PO Box 83720
 Boise, ID 83720-0080
 (208) 334-2301
 Filing Fee: \$30.00 - Make Checks Payable to Secretary of State

For Office Use Only
-FILED-
 File #: 0003678565
 Date Filed: 11/15/2019 8:52:12 PM

B0406-2628 11/15/2019 8:55 PM Received by ID Secretary of State Lawrence Denney

Articles of Incorporation (Nonprofit)	
Select one: Standard, Expedited or Same Day Service (see descriptions below)	Standard (filing fee \$30)
Article 1: Corporation Name Entity name	Kootenai Classical Academy Inc.
Article 2: Effective Date The corporation shall be effective	when filed with the Secretary of State.
Article 3: Purpose The purpose for which the corporation is organized is:	Educational
Article 4: Voting Members: The corporation	does not have voting members.
Article 5: Asset Distribution on Dissolution Upon dissolution the assets shall be distributed: According to the Idaho Statutes: Title 33, Education, Chapter 52, regarding Public Charter Schools: 33-5212 paragraphs 1 and 2.	other asset distribution:
Article 6: IRS Designation Is this nonprofit a 501(c)3? 501(c)3 purpose for which the corporation is organized:	Yes Educational K-12: Incorporation of Kootenai Classical Academy is required by Idaho State Charter School Law
Article 7: The mailing address of the corporation shall be: Mailing Address	741 S FAIRMONT LOOP COEUR D ALENE, ID 83814-8942
Article 8: Registered Agent Name and Address Registered Agent	Registered Agent Edward Kaitz Physical Address: 741 S. FAIRMONT LOOP COEUR D ALENE, ID 83814 Mailing Address: 741 S FAIRMONT LOOP COEUR D ALENE, ID 83814-8942
Article 9: Incorporator Name(s) and Address(es)	
Name	Incorporator Address
Edward Kaitz	741 S. FAIRMONT LOOP COEUR D'ALENE, ID 83814
J. Marcell LeBlanc	473 KONNIOTTO LANE SANDPOINT, ID 83864
Renee Burgess	2083 N WESTWIND DRIVE POST FALLS, ID 83854



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Article 10: Director Name(s) and Address(es)

Name	Title	Director Address
Edward Kaitz	Director	741 S FAIRMONT LOOP COEUR D ALENE, ID 83814-8942
J. Marcel LeBlanc	Director	473 KONNIOTTO LANE SANDPOINT, ID 83884
Renee Burgess	Director	2083 N WESTWIND DRIVE POST FALLS, ID 83854
Benjiman Kettle	Director	5401 E LANCASTER HAYDEN, ID 83835

The Articles of Incorporation must be signed by at least one incorporator.

<i>Edward Kaitz</i>	<u>11/15/2019</u>
Edward Kaitz	Date
<i>Marcel LeBlanc</i>	<u>11/15/2019</u>
J. Marcel LeBlanc	Date
<i>Renee Burgess</i>	<u>11/15/2019</u>
Renee Burgess	Date

B.2 Bylaws

Bylaws

ARTICLE I: NAME; LEGAL STATUS

1.1. Name. The name of the Corporation is Kootenai Classical Academy Inc. (hereafter referred to as "Corporation"), and the name of the charter School governed by the Corporation is Kootenai Classical Academy (hereafter referred to as the "School"). The initial principal office of the Corporation shall be as stated in the Articles of Incorporation. The Corporation may at any time and from time to time change the location of its principal office, though the Corporation expects to maintain its principal address at the School. The School is located at [will be entered when location is secured].

1.2. Legal Status. The Corporation is a nonprofit entity under Idaho law. It exists in order to create, promote, and govern the operations of the School. The School is a charter School pursuant to Idaho Statute: Title 33, Education. Chapter 52.

ARTICLE II: PURPOSE

2.1. Purpose. As set forth in the Articles of Incorporation, the Kootenai Classical Academy, Inc. is organized exclusively for educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, 1986, or the corresponding provision of any future federal law. Notwithstanding any other provision of these Bylaws to the contrary, the Corporation shall not carry on any activities not permitted of:

- a) A corporation exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provisions of any future Federal income tax code; or
- b) A corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, or the corresponding provisions of any future Federal income tax code.
- c) The corporation shall not inure to or otherwise provide private gain of any person. The Corporation may not carry on any activity for the profit of its Officers, Directors or other persons or distribute any gains, profits or dividend to its Officers, Directors, or other persons as such.

ARTICLE III: PROPERTY

3.1 Property Dedicated to Nonprofit Purposes. The property of the Corporation is irrevocably dedicated to the public educational purposes of the School. No part of the net income or assets of the Corporation shall ever inure to the benefit of any of its Directors, Officers, or to the benefit of any private person, except that the Corporation is 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.

3.2 Distribution of Assets Upon Dissolution. Pursuant to Idaho Code 33-5212(2), in the event of a public charter school closure for any reason, the assets of the school shall be distributed first to satisfy outstanding payroll obligations for employees of the school, including any tax, public employee retirement system and other employee benefit obligations, then to creditors of the school, and then to the authorized chartering entity in the case of a public charter school authorized by the board of a local school district. In the case of a public charter school authorized by any other authorized chartering entity, any remaining assets shall be distributed to the public school income fund. Assets purchased using federal funds shall be returned to the authorized chartering entity for redistribution among other public charter schools. If the assets of the school are insufficient to pay all parties to whom the school owes compensation, the prioritization of the distribution of assets may be determined by decree of a court of law. If, after complying with Idaho statutory requirements, additional assets remain upon dissolution, the remaining assets shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or 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 disposed of shall be disposed of by a court of competent jurisdiction in the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

ARTICLE IV: OFFICES

4.1. Offices. The principal office of the Corporation shall be located within the County of Kootenai, State of Idaho, at such place as the Board of Directors shall designate. Additional offices may be maintained at such other places as the Board of Directors may designate. The Corporation shall continuously maintain within Kootenai County a registered office at such place as may be designated by the Board.

ARTICLE V: MEMBERSHIP

5.1. Membership. The Corporation shall have no members. Any action which would otherwise by law require approval by a majority of members or approval by the members shall require only approval of the Board of Directors. All rights which would otherwise by law vest in the members, shall vest in the Board of Directors.

ARTICLE VI: DIRECTORS

6.1. Definition. The Corporation shall be governed by its Directors; as a body the Directors constitute the Board of Directors (hereafter referred to as "Board"); Officers, described in Article VII herein these Bylaws, shall be elected from among the Directors.

6.2. Founding Directors. The Founding Directors of the Corporation, listed in Exhibit A herein, (the "Founding Directors") shall undertake the initial organization of the Corporation, and each shall serve until a successor Director is elected at the first annual meeting of the Directors after the School's opening, or his or her earlier resignation or removal in accordance with these Bylaws and applicable state law. Founding Directors who

are subsequently elected to serve as governing Directors of the Corporation after the founding efforts are completed and the School becomes operational are subject to the tenure and term limitations set forth in Section 6.4 herein. Such limitations of tenure shall not include time served as a Founding Director.

6.3. Powers and Duties. Without prejudice to its general powers, but subject to the same limitations set forth herein, the Board shall have, in addition to any other powers enumerated in these Bylaws and permitted by law, the power to conduct, govern, oversee, and control the affairs and activities of the Corporation and to make such rules, policies, and regulations therefore which are not inconsistent with law, the Corporation's Articles of Incorporation or these Bylaws.

6.4. Number, Election, Tenure, Qualifications, and Requirements of Directors. The number of Directors shall be a range consisting of no fewer than five (5) but not more than nine (9) persons. The Board shall fix the exact number of Directors, within these limits, by Board resolution or by amendment of the Bylaws, excepting that the number can only be increased by a two-thirds (2/3) vote of current directors. No decrease shall shorten the term of any incumbent Director. At no time shall more than two (2) Directors be parents of students attending the School.

- a. The Directors of the Board shall, upon election, immediately enter upon the performance of their duties and shall continue in office until their successors shall be duly elected and qualified, except in cases of resignation or removal. All Directors of the Board must be approved by a two-thirds (2/3) vote of the Directors then in office.
- b. Directors will be selected from nominations submitted by Board members. Except in cases of resignation or removal, elections will be conducted at an annual meeting designated for elections after submission and review of nominees.
- c. Directors shall be elected for a term of three (3) years, excepting the initial governing Board as described in section (d) and (e).
- d. Director terms for the initial governing Board will be staggered to achieve one-year intervals. Director chairs numbered one (1), four (4), and seven (7) (as applicable) shall begin as full three-year terms. The initial term of director chairs numbered two (2), five (5), and eight (8) (as applicable) shall be two-year terms. The initial term of director chairs numbered (3), six (6), and nine (9) (as applicable) shall be one-year terms.
- e. After the first Director terms for initial governing Board chairs numbered two (2), three (3), five (5), six (6), and, if applicable, eight (8) and nine (9), subsequent Directors shall each be elected to three-year terms. Each Director shall hold office until the annual meeting when his or her term expires or until his or her successor has been elected and qualified.
- f. Terms shall remain staggered so that no more than half the Board shall be up for election in any one (1) year, unless a vacancy needs to be filled. When the term of a Director has expired or when a Director resigns, the remaining Directors shall elect a new Director to fill the vacancy. Full terms are for no more than

three (3) years. When a Director fills a vacancy, he or she is elected to serve the remainder of the replaced Director's term. When a Director fills a vacancy in a shortened, staggered term, the Director is elected to serve the remainder of the replaced Director's initial term.

- g. Vacancies: Newly created Directorships resulting from an increase in the number of Directors or vacancies occurring in the Board for any reason, may be filled, after a review of submitted nominees, by a vote of a majority of Directors currently holding office.
- Each Director must be an individual person who is twenty-five (25) years of age or older. Qualifications for Board Directorship shall include but not be limited to: (i) enthusiasm for the School and conviction in its purpose as described in these Bylaws; (ii) support for the principles of the Board's agreement with Hillsdale College and the mission of the Barney Charter School Initiative of Hillsdale College, including willingness to complete required BCSI training and informational sessions; (iii) willingness to submit to an extended criminal record background check; (iv) agreement to abide by an established Board code of conduct and to comport themselves prudently and ethically, holding themselves accountable to good governance and public fiduciary and stewardship practices; (v) commitment to professional development and the completion of any state requirements for training or development; (vi) special skills to address specific oversight and needs of the School; (vii) willingness to accept and support decisions democratically made; and (viii) ability to represent the School to the community when needed. The Board will work to ensure that membership will include a broad range of expertise, including backgrounds in education, science, legal, administrative, financial, and related fields.
- h. Each Director shall attend at least eight (8) regular monthly meetings of the Board per year. Failure to attend the minimum number of regular meetings can constitute cause for removal.
- i. A vacancy or vacancies on the Board shall be deemed to exist on the occurrence of the following: (i) the death, resignation, or removal of any Director; (ii) whenever the number of authorized Directors is increased; or (iii) the failure of the Board, at any meeting at which any Director or Directors are to be elected, to elect the full authorized number of Directors. The Board may, by resolution adopted by the vote of a majority of Directors, declare vacant the office of a Director who has been declared of unsound mind by an order of court, or convicted of a felony, or found by final order or judgment of any court to have breached a duty under state or federal law. Whenever any vacancy occurs in the Board, it shall be filled without undue delay by a majority vote of the current Directors at a regular or special meeting of the Board.
- j. Directors are limited to two (2) consecutive terms of office, though a Director may serve two (2) terms after being elected to fulfill the remainder of a term vacated by another Director, or after being elected to serve a shortened term due to the initial staggered terms. After two consecutive normal terms, a Director must remain off the Board for six (6) full calendar years before being eligible for re-election.

- k. No reduction of the authorized number of Directors shall have the effect of removing any Director before that Director's term of office expires unless the reduction also provides for the removal of that specified Director in accordance with these Bylaws and state or federal law.

6.5. Compensation. Directors of the Board shall not receive any compensation for their services as Directors or Officers. All Board members are required to obtain the approval of the Board in advance of engaging in travel or encumbering other expenses on behalf of the school. Any such reasonable and approved expenses that are not reimbursed by the School shall be construed as a gift to the School.

6.6. Removal or Resignation. Subject to the provisions of Section 30-30-Part 4: 408-409 of the Idaho Nonprofit Public Corporation Act, any Director of the Board may be removed for cause by the affirmative vote of two-thirds (2/3) of the Directors then in office, excluding the member at issue, whenever in their judgment such removal would serve the best interests of the School. A Director may resign at any time by giving written notice to the Board, the President, or the Secretary. Unless otherwise specified in the notice of resignation, the resignation shall take effect upon the receipt thereof by the Board or Officer, and the acceptance of the resignation shall not be necessary to make it effective. If the resignation is effective at a future time, a successor may be selected before such time, to take office when the resignation becomes effective.

The Board may, by majority resolution, declare vacant the office of a Director who fails to attend eight (8) Board meetings during any calendar year unless the absences are due to mitigating factors that have been previously disclosed to, and approved by, the Board.

The Board may, by a two-thirds (2/3) vote of the Directors, excluding the Director at issue, declare vacant the position of any Director who fails or ceases to meet any required qualification in effect at the beginning of that Director's current term of office.

6.7. Confidentiality. As a public entity, most School and Board records are subject to public inspection or request. Directors are prohibited, however, from publicly discussing matters covered in a properly noticed and duly convened closed meeting of the Board.

6.8. Orientation/Training. As a condition of serving, all new Directors will be required to participate in an orientation or training session approved by the Board, preferably prior to appointment or election, but no later than ninety (90) days after appointment or election. Such orientation shall include the requirement that each Director make a reasonable effort to know and understand what shall dictate the Corporation and School's compliance standards and, as a minimum, certify they have read the School's charter, these Bylaws, the Board's agreement with the Barney Charter School Initiative of Hillsdale College, and any management-related contract that may be in place, pledging his or her duty to the compliance covenants they require. Board members who fail to complete the orientation or training within the ninety (90) day period established in this section shall be deemed to have resigned. The Board shall adopt periodic, regular Board training and

development sessions for all members for the purposes of ongoing education in good governance practices and the fiduciary duties of each of its members.

ARTICLE VII: OFFICERS

7.1. Number, Election, and Tenure of Officers. The Officers of the Board shall include a President, Vice President, Secretary, and Treasurer. Officers of the Corporation shall also be Directors of the Corporation. Individual Officers of the Corporation have no authority over school affairs, except as provided by law or as authorized by the Board.

- a. **Election:** The Board shall elect and appoint, by majority vote of the Directors, all Officers of the Board at an annual meeting of the Board, which Officers shall be installed in office at such annual meeting to serve for terms of one (1) year or until their successors have been duly elected and qualified. If more than one (1) nominee exists for any vacancy, the nominee receiving the greatest number of votes shall be declared elected and shall be installed in office at an annual meeting.
- b. **Removal:** Any Officer may be removed, with cause, by the Board at any regular or special meeting of the Board by a two-thirds (2/3) vote of the Directors then in office.
- c. **Resignation:** Any Officer may resign at any time by giving written notice to the Corporation. Any resignation shall take effect on the date of the receipt of that notice or at any later time specified in that notice; and, unless otherwise specified in that notice, the acceptance of the resignation shall not be necessary to make it effective. Any resignation is without prejudice to the rights, if any, of the Corporation under any contract to which the Officer is a party.
- d. **Vacancies:** A vacancy in any office because of death, resignation, removal, or otherwise, shall be filled by the Board by a majority vote of then-current Directors for the unexpired portion of the term.

7.2 Description of Officers:

- a. **President.** Subject to Board policy and Board direction, the Board shall elect a President who shall lead the Board in its oversight of the Corporation and of School management. The President, as chief governance officer, shall act as Chair, presiding over meetings of the Board, signing legal documents as required by law, and exercising and performing such other powers and duties as may, from time to time, be assigned to him or her by the Board or prescribed by these Bylaws. The President, individually, shall not have the authority to make decisions about policies created by the Board, engage in matters of accountability and authority delegated to the School Leader, nor give directives to the School Leader, as that authority is possessed only by the Board as a whole. The President is not the chief executive of the Corporation or the School, nor does he or she have any greater authority regarding operations than any other Director. The President is a specially empowered Board member whose role is to assure the integrity of the Board's processes and, secondarily, to occasionally

represent the Board to outside parties on matters such as announcing Board positions, and to state his or her decisions and interpretations within an area delegated to him or her by the Board.

- b. **Vice President.** The Vice President shall perform the duties of the President in the absence of the President or at the request of the President. If a vacancy occurs in the presidency, the Vice President will act in the capacity of the President until the office has been filled by a vote of the Board Directors.
- c. **Secretary.** The Board shall elect a Secretary who shall keep or cause to be kept a book of minutes and other critical Board documents of all Board meetings at the principal office or at such other place as the Board may order. Board minutes shall contain the time and place of each meeting, whether regular or special (if special, how authorized), the notice given thereof, the name(s) of those present, and the proceedings thereof, assuring adherence to the tenets of the most current edition of Robert's Rules of Order and state and federal law. The Secretary shall give or cause to be given notice of all Board meetings required by these Bylaws or by law. Excepting cases where there is a real or perceived conflict of interest, the Secretary shall countersign, when required, all authorized bonds, contracts, deeds, leases, or other legal instruments. In those cases of real or perceived conflict of interest, any Officer, with the approval of the Board, may countersign authorized bonds, contracts, deeds, leases, or other legal instruments. The Secretary of the Board shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. The Board may appoint a designee to assist with the responsibilities of the Secretary as described herein, including recording and transcribing the minutes of the meetings, posting notices and agendas, and preparing packets for the Governing Board's review. The Board Secretary will review the minutes prior to presenting them to the Governance Board for approval.
- d. **Treasurer.** Subject to Board policy and Board direction, the Board shall elect a Treasurer who shall assist the Board in the oversight of the School's financial performance, reporting, and safeguarding. The Treasurer shall chair the Board Audit Committee whose purpose shall be to assist the Board in ensuring that the School's money and assets are safeguarded from fraud, waste, and abuse; spent in conformity with Board policy; and properly accounted for on a continuous basis. The Treasurer shall not individually have the authority to give directives to the School Leader or any staff or faculty of the School, nor shall the Treasurer be given the authority to sign checks on behalf of the Corporation or School. The Treasurer shall have such other powers and perform such other duties as may be prescribed by the Board from time to time. During the foundation period of the school the Treasurer may, at the request of the Board: (i) deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the Corporation with such depositories as may be designated from time to time by the Board; (ii) disburse the funds of the Corporation as may be ordered by the Board; or (iii) may render to the Board, upon request, an account of all transactions as Treasurer and of the financial

condition of the Corporation. The Treasurer shall present a current operating statement and report to the Board at all regular meetings.

Upon transition to a governing Board, the Treasurer shall be familiar with the fiscal affairs of the School and keep the Board informed thereof should the School's Business Manager be unable to do so.

- e. Any Officer may resign at any time by giving written notice to the Corporation. Any resignation shall take effect on the date of the receipt of that notice or at any later time specified in that notice; and, unless otherwise specified in that notice, the acceptance of the resignation shall not be necessary to make it effective. Any resignation is without prejudice to the rights, if any, of the Corporation under any contract to which the Officer is a party.
- f. A vacancy in any office because of death, resignation, removal, or otherwise, may be filled by the Board by a majority vote of current Directors for the unexpired portion of the term.

ARTICLE VIII: Authority of the Board.

8.1 General: As the governing body, the Board of Directors is responsible for ensuring the School will be operated for the educational benefit of its students. Included with this responsibility are the obligations concomitant with school operations, showing compliance to relevant federal, state, and local laws, and the task of fiduciary oversight of school finances. The School Charter authorizes the Board, in accordance with these Bylaws, to formulate, adopt, and implement, in a fair and uniform manner, policy to achieve the Mission of the School. When necessary for the execution of its responsibilities, the Board of Directors may delegate its authority as specified in these Bylaws.

8.2 Individual Member's Authority: A member of the Board is a public officer who, individually, has no power or authority. The charter vests power in the Board, and not in the members, either individually or otherwise. These powers must be exercised by the Board at a public meeting in regular or specially called meetings, with actions duly recorded in its minutes.

8.3 Binding Authority: The Board shall not be bound in any way by any action or statement on the part of any individual Board member except when such a statement or action is in pursuance of specific instructions from the Board. Any such exception shall be stated in the minutes of a Board meeting.

8.4 Final Authority. The Board reserves to itself final authority for decisions concerning:

- a. performing any, and all, duties imposed on the Board collectively or individually by law or by these Bylaws;
- b. making or changing policies, rules, and regulations not inconsistent with law, or with these Bylaws, for the effective management and control of the School and its affairs, and of its staff, faculty, other employees, and agents; to lease, purchase, or otherwise acquire, in any lawful manner, for and in the name of the School, any and all real and personal property,

- rights, or privileges deemed necessary or convenient for the conduct of the School's purpose or mission;
- c. acquiring and disposing of real and personal property provided that at the termination of the charter, all assets of the charter shall be disposed of in accordance with Idaho law;
 - d. entering into agreements and contracts with individuals, groups of individuals, Corporations or governments for any lawful purpose;
 - e. employing and establishing evaluation criteria for the School Leader, and performing annual evaluations of the school leader's performance;
 - f. keeping a complete record of all minutes, acts, and proceedings of the Board;
 - g. approving the annual budget of anticipated income and expenditures, and directing the preparation of the annual financial audit report, as well as any other audits required by law, to be made by an accountant selected by the Board, showing in reasonable detail all of the assets, liabilities, revenues, and expenses of the School and its financial condition;
 - h. ensuring the School's money and assets are reasonably safeguarded against fraud, waste, and abuse, and that the School's financial transactions are managed according to Generally Accepted Accounting Principles and any other applicable standards;
 - i. ensuring the School's financial position and performance meet all required performance framework metrics it establishes;
 - j. setting the proper tone for the ethical and prudent conduct of the Corporation and School in all matters related to its organization and the conduct of its work;
 - k. ensuring the ethical public stewardship and accountability of the Corporation and School;
 - l. upholding and enforcing all laws related to the School's operation;
 - m. assuring adequate funding for the operation of the School; and
 - n. delegating the management of the activities of the School to others, so long as the affairs of the School are managed, and its powers are exercised, under the Board's ultimate oversight and jurisdiction.

8.5 Delegation to the School Leader: Subject to such supervisory powers as may be given by the Board, the business, affairs, and property of the School, and all Board authority delegated to the staff and faculty, shall be delegated through and managed by the School Leader so that all authority and accountability of staff and faculty and the management of the School, as far as the Board is concerned, is considered to be under the authority and accountability of the School Leader, who shall be employed by the Board at its pleasure and accountable to the Board to serve as the chief executive and administrator of the School. The Board shall provide oversight of the School Leader and will direct and instruct the School Leader to achieve certain results for the School through the Board's establishment of policies designed to describe the results it expects and those it does not. In doing so, the Board shall:

- a. limit the latitude the School Leader may exercise in practices, methods, conduct, and other "means" through the establishment of policies and guidelines setting forth such related limitations so as to maintain the Board's established standards of virtues, prudence, and ethics;
- b. provide clear expectations and a framework of virtues for the School Leader to reasonably interpret Board policies to establish all further management and operational policies, make all necessary decisions, take all appropriate actions, and develop all activities within the operation of the School;

- c. respect and support the School Leader's choices, within the boundaries and delegations established by the Board;
- d. not bind the School Leader except through its decisions while acting collectively, unless it specifically authorizes such exercise of authority through a Director, Officer, or designated committee on limited and rare occasions through a majority vote of the Directors; and
- e. not require the School Leader to provide information or assistance without Board authorization through a majority vote of the Directors when such a request, in the School Leader's judgment, causes a material amount of staff or faculty time or funds, or is disruptive to the School's operation.

The School Leader shall hold final authority in the management of the School, outside the broader powers of the Board. As such, the School Leader's accountability is an accumulation of the responsibilities of the staff and faculty and is held to the judgment of the Board who shall monitor the School Leader diligently and respectfully. The Board may establish policy to acquire such monitoring data by internal report, external report, or by direct Board inspection.

The Board shall have one employee, as a single point of delegation, in the School Leader, who is solely accountable for the outcome of the School's operation by achieving the results expected by the Board and by not violating the Board's policies respecting his or her authority, domain, or purview. In every case, the standard for compliance of the School Leader to the Board shall be any reasonable interpretation of the policies of the Board on outcomes it expects and executive limitations it imposes.

8.6 Work of the Board. The Board shall set about doing its work with fidelity to the tenets of sound governance and practices in order to effectively bring about its purpose with integrity and efficiency. The Board shall work to create, through explicit policy and guidelines, the prudent and ethical function of the Corporation and the School. Though it shall dutifully safeguard its decision-making authority on all matters as described by these Bylaws, it shall retain such primary practical and workload interest in:

- a. setting the Board's work plan and agenda for the year and for each meeting;
- b. determining Board training and development needs;
- c. attending to discipline in Board attendance, following these Bylaws and other self-imposed rules;
- d. becoming expert in good governance practices and policy-making;
- e. establishing the limits of the School Leader's authority to budget, administer finances and compensation, establish programs, and otherwise manage the operations of the School through the Board's proscriptive policy, instruction, and other guidelines;
- f. establishing the results, recipients, and acceptable costs of those results that justify the Corporation's existence;
- g. examining monitoring data and determining whether the Corporation or School has achieved a reasonable interpretation of Board-stated and charter-required criteria;

- h. conducting regular self-assessment and Board evaluation to improve its effectiveness and governance practices, including its compliance to the policies it creates; and
- i. establishing and executing a long-term strategic plan for the School's growth and fiscal and operational sustainability.

ARTICLE IX: MEETINGS

9.1 Regular Meetings. The Board shall establish a regular schedule for monthly meetings, no fewer than ten (10) months per year. Minutes of each Board meeting shall be taken and approved by the Board and made available to the public according to Idaho state requirements.

9.2 Special Meetings. Special meetings may be called or requested by the President or any two (2) Directors. Special meetings should only be called when circumstances require immediate action, or to resolve specific items of business that could not be addressed in a regular meeting. The President or the Directors responsible for calling the meeting, shall make every reasonable effort to ensure that all Board members are able to attend. Minutes of each special meeting shall be taken and approved by the Board.

9.3 Emergency Meetings. If warranted, an emergency meeting may be called by the President or any two (2) Directors; the Board will take all reasonable steps to provide notice of such meeting and will ensure that the notice and procedure for such meeting follows Idaho state statute.

9.4 Annual Meeting. The annual meeting of the Board of Directors of the Corporation for the election of Directors to succeed those whose terms expire and for the transaction of other business as may properly come before the meeting, shall be held each year at a date and time to be determined by the Board.

9.5 Place of Meeting. Meetings of the Board of Directors, regular or special, may be held at such place within or without the State of Idaho, and upon such notice as prescribed by resolution of the Board. The place at which such meetings shall be held shall be stated in the notice and call of meeting. No change in the place of meeting shall be made within three (3) days before the day on which an election of Directors is to be held.

9.6 Notice. Absent controlling state statute, notice of all regular meetings or changes to the calendar of regular meetings must occur at least ten (10) days in advance of an affected meeting. Directors shall receive notice by telephone, electronic methods, or by written notice; the public should receive notification via reasonable methods that may include, but are not limited to, print and electronic media. Absent controlling state statute, notice of any special meeting of the Board shall be given at least three (3) days in advance of the meeting by telephone, electronic methods, or by written notice. Any Director may waive notice of any meeting. The attendance of a Director at any meeting will constitute a waiver of notice

of such meeting, except where a Director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted, nor the purpose of any regular Board meeting needs to be specified in the notice, unless specifically required by law or by these Bylaws. The notice for a special meeting must include the purpose of the meeting and a description of the business to be transacted.

9.7 Advanced Notice: The Board recognizes the importance of timely communication among its members and between the Board and the School Leader. The School Leader, or his or her designee, should give the Board prior notice of matters submitted for deliberation at meetings. Notice should be sufficiently ahead of meetings to comply with the meeting notice requirements as stated Idaho Open Meeting laws.

9.8 Quorum and Voting. A quorum at Board meetings shall consist of a majority of current Directors. A majority act of the Board Directors at any meeting at which a lawful quorum is present shall be the act of the Board, unless the act of a greater number is required by law or by these Bylaws. Proxy voting is not permitted.

9.9 Remote Participation . To the extent permitted by (Idaho) law, any member of the Board or committee thereof may participate in a meeting of such Board or committee by means of a teleconference network, videoconference technology, or similar communications method by which all persons participating in the meeting can hear each other. For regular meetings, however, at least three (3) Directors must be physically present at the meeting location to form a quorum. All votes taken with participants attending by telephone or teleconference shall be by roll call.

9.10 Meetings Open to the Public. Except as provided herein, all meetings shall comply with Idaho Open Meetings Law, Title 74 Chapter 2.

9.11 Meeting Minutes. The Directors of the Corporation shall require written minutes of all its meetings. However, neither a full transcript nor a recording of the meeting shall be required. All minutes shall be available to the public within a reasonable time after the meeting and shall include at least the following information: (a) all members of the Directors of the Corporation present; (b) all motions, resolutions, orders, or ordinances proposed, and their disposition; and (c) the results of all votes, and upon the request of a member, the vote of each member by name. Minutes of any executive sessions held by the Directors of the Corporation under Title 74, Chapter 2 of the Idaho Code may be limited to material, the disclosure of which is not inconsistent with the provisions of section 74-206, Idaho Code, but must contain sufficient detail to convey the general tenor of the meeting. Unofficial minutes should be delivered to Directors in advance of the next regularly scheduled Board meeting along with the agenda for the next Board meeting. Minutes need not be read publicly, provided Directors have had an opportunity to review them before adoption. A file of permanent Board meeting minutes shall be maintained in the office of the Board Secretary or his or her designate, to be made available within a reasonable period of time after a meeting for inspection upon written request.

9.12 Executive Sessions. “Executive session” means any meeting or part of a meeting which is closed to any persons for deliberation on certain matters. An executive session may be held by the Directors of the Corporation for any of the reasons specified in Title 74, Chapter 2, Idaho Code. In order to convene into a duly authorized executive session all of the following must occur: (a) a member of the Board of the Corporation must move for holding of an executive session and the motion must state the specific subsections for going into executive session; (b) two-thirds (2/3) of the Directors of the Corporation must vote in favor of holding of such executive session; and (c) said vote must be by roll call and recorded in the meeting minutes, showing the individual vote of each Director present. No executive session may be held for the purpose of taking any final action or making any final decision. Unless otherwise allowed by law, no Director of the Corporation may disclose the content of an executive session to an outside source.

9.13 Consent Agenda. To expedite business at a Board meeting, the Board approves the use of a consent agenda, which includes those items considered to be routine in nature. Any item which appears on the consent agenda may be removed by any Director. Any Director who wishes to remove an item from the consent agenda shall give advance notice in a timely manner to the Secretary of the Board. The remaining items will be voted on by a single motion. The approved motion will be recorded in the minutes, including a listing of all items appearing on the consent agenda.

ARTICLE X: CHARTER SCHOOL POLICY

10.1 Adoption and Amendment of Policies. The adoption of new policies and the revision and amending of existing policies, shall be the sole responsibility of the Board. All policies shall conform to local, state, and federal laws as well as to the rules and regulations of the Idaho Department of Education. Proposed new policies and proposed changes in existing policies shall be presented in writing for reading and discussion at regular or special Board Meetings. Suggested policies or proposals may be referred to the School Leader for detailed study, as needed, prior to Board action. Any Board member, citizen, or employee of the Board may present data, written, or oral arguments in support of or in opposition to proposed policy. Any written statement by a person relative to a proposed policy or amendment should be directed to the Board Secretary prior to the second reading.

Proposed new policies and proposed changes in existing policies shall undergo a minimum of two (2) readings in the following manner:

- a. the proposed new or amended policy shall be presented in writing for reading and discussion at a regular or special Board meeting; and
- b. the final vote for adoption shall take place no earlier than the second reading of the new or proposed change in policy.

Although approval of a new or amended policy requires a minimum of two (2) readings, accelerated approval may be granted by the Governing Board in lieu of formal policy to meet emergency conditions or special events which will take place before formal action can be taken. Accelerated approval must be by specific motion of the Board. All new or amended policies shall become effective upon adoption unless a specific effective date is provided in the motion for adoption. Policies as adopted or amended shall be made a part

of the meeting minutes and shall also be included in the Charter School's policy manual. Policies of the Charter School shall be reviewed annually by the Board.

10.2 Administration in Absence of Policy. In cases where action must be taken before the next Board meeting and where the Board has provided no policies or guides for administrative actions, the School Leader shall have power to act. The School Leader's decisions, however, shall be subject to review by the Board at its next regular meeting. Additionally, it shall be the duty of the School Leader to inform the Board of such action and need for policy.

10.3 Suspension of Policies. Under circumstances which require a waiver of a policy, the policy may be suspended by a majority vote of the members present. To suspend a policy, all Directors must have received written notice of the meeting including the proposal to suspend the policies and an explanation of the purpose of such proposed suspension. If such a proposal is not made in writing prior to the meeting, the policies may only be suspended by a unanimous vote of all Directors present.

10.4 Policy Manuals. The School Leader shall develop and maintain a current policy manual which contains the policies of the Charter School. Each administrator, as well as staff, students, and interested parties, shall have ready access to the manual. Policy manuals may be distributed upon request, but the Charter School shall retain the exclusive rights to the policies within, including the right to revise or recall the manual.

10.5 Administrative Procedures. The School Leader shall develop such administrative procedures as are necessary to ensure consistent implementation of policies adopted by the Board. When a written procedure is developed, the School Leader shall submit it to the Board as an information item. Such procedures need not be approved by the Board, though they may be revised when it appears that they are not consistent with the Board's intentions as expressed in its policies. On controversial topics, the School Leader may request Board approval.

ARTICLE XI: PUBLIC RECORDS REQUESTS

11.1 Records Available to Public. Every person has the right to examine and request a copy of any Charter School record at reasonable times. All Charter School records, except those restricted by state and federal law, shall be available to citizens for inspection at the office of the principal or at a place designated by the principal. Patrons who request copies of available charter school records may be asked to pay for the cost of the requested copies.

11.2 Written Records Request Required. All persons or entities requesting records must make a written request which includes the person or entity's name, mailing address and telephone number.

11.3 Response to Request for Examination of Public Records. The Charter School shall either grant or deny a person's written request to examine or copy public records within three (3) business days of the date of the receipt of a request for public records. If a

longer time period is needed to locate or retrieve the records, the Charter School shall notify the person requesting the records and provide the records no later than ten (10) business days following the request. If the Charter School fails to respond within ten (10) business days after the requested is received, the request shall be deemed to be denied. If the Charter School denies a person or entity's request to examine or copy records, or denies in part and grants in part, the request to examine and/or copy the records, the person legally responsible for administering the Charter School shall notify the person or entity in writing of the denial or partial denial of the request for the public record. Additionally, the notice of denial or partial denial shall state that the attorney for the Charter School has reviewed the request or shall state that the Charter School has had an opportunity to consult with an attorney regarding the request for examination or copying of a record and has chosen not to do so. The notice of denial or partial denial shall also indicate the statutory authority for the denial and clearly indicate the right to appeal the denial or partial denial and the time period for doing so.

11.4 Other Provisions of the Public Writings Law. Pursuant to Title 33 Chapter 52 of the Idaho Code, all other provision of Title 74, Chapter 1 of the Idaho Code shall be applicable to a request for public records in the same manner that a traditional school and the Governing Boards of school trustees are subject to those provisions.

ARTICLE XII: CONFLICTS OF INTEREST

12.1. Annual Disclosure. All Directors will annually disclose to the Board, in writing, the existence of any relationship or interest which could give rise to a conflict.

12.2. Conflict of Interest. Any Director or committee member having an interest in a contract, other transaction, or program presented to or discussed by the Board or Board committee for authorization, approval, or ratification shall make a prompt, full and frank disclosure of his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction which might reasonably be construed to be a private interest of the Director. The body to which such disclosure is made shall thereupon determine, by majority vote, whether the disclosure shows that a conflict is deemed to exist. If a conflict is determined, such person shall not vote on, nor use his or her personal influence on, nor be present during, the discussions or deliberations with respect to such contract or transaction (other than to present information or to respond to questions prior to the discussion). The minutes of the meeting shall reflect the disclosure made, the vote thereon and, where applicable, the recusal from voting and participation. In cases where the interest in question will require frequent or on-going disclosures and/or the recusal of a Director from voting—such as, but not limited to lease agreements or on-going management services—the Director in question is required to resign from the Board within sixty (60) days of an executed contract.

12.3. Nepotism. The prohibitions against conflicts of interest in these Bylaws have the following consequences for immediate relatives of Board Directors:

- a. The conflict-of-interest policy shall apply in cases where the child, parent, or spouse of a Director has an interest in a contract, other transaction, or program presented to or discussed by the Board or Board committee that stands to benefit a student, staff, or faculty member of immediate relation to a Director.
- b. In cases wherein the School or Corporation directly employs the child, parent, or spouse of a Director as a full-time, paid employee, the Director in question must resign within sixty (60) days of an accepted offer of employment or within forty-five (45) days of the employee's first day of full-time employment, whichever comes sooner.

ARTICLE XIII: COMMITTEES

13.1. Purpose of Committees. Before forming any Board committee, the Board will first ascertain that the committee's purpose is to help the Board do its work. The Board will not form any committee intended to help manage the School or assume any delegated authority and accountability designated to the School Leader.

13.2. Committees. By one or more resolutions adopted by a majority vote of the Directors present at a meeting with quorum, the Board of Directors may designate one or more committees, each of which, to the extent provided in the resolution establishing such committee and these Bylaws, shall have and may exercise specific delegated authority. Each committee must include at least two (2) Directors, and may include additional committee members that are not Board members. Delegation of authority to any committee shall not operate to relieve the Board of Directors or any Director from any responsibility or standard of conduct imposed by law or these Bylaws. Rules governing procedures for meetings of any committee shall be the same as those set forth in these Bylaws and the Policies of the Board of Directors unless the Board itself determines otherwise. Any committee may be given certain specific delegated authority except that no committee may:

- a. approve any action for which state law also requires approval of the Directors or approval of a majority of all Directors;
- b. fill vacancies on the Board or in any committee which has the authority of the Board;
- c. fix compensation of the Directors for serving on the Board or on any committee;
- d. amend or repeal Bylaws or adopt new Bylaws;
- e. amend or repeal any resolution of the Board which by its express terms is not so amendable or able to be repealed;
- f. appoint any other committees or members thereto;
- g. approve any transaction (i) between the Corporation and one or more of its Directors; or (ii) between the Corporation and any entity in which one or more of its Directors have a material financial interest; or
- h. have express delegated authority to make decisions on behalf of the Board collectively, but shall make recommendations for the Board's final approval, as appropriate.

13.3. Committee Quorum. A majority of the committee members shall constitute a quorum for the transaction of committee business, except to adjourn. A majority of the committee members present, whether or not constituting a quorum, may adjourn any meeting to another time and place. Every action or decision made by a majority of the committee members at a duly-held meeting with a quorum present, shall be regarded as an act of the committee, subject to the provisions of Idaho state law or these Bylaws.

13.4. Committee Authority. The Board may, at any time, revoke or modify any or all authority the Board has delegated to a committee. The Board may increase or decrease the number of committee members [though no fewer than two (2) Board members], and fill vacancies in a committee.

13.5. Standing Committees. The Board of Directors will constitute and appoint Directors to several permanent standing committees, including a governance committee, an audit and financial oversight committee, and a risk-management oversight committee.

- a. The Governance Committee shall assist the Board in developing optimum Board performance with the goal of sustaining it upon Board member turnover. The committee's duties include identifying (and recruiting) potential candidates for Board service and coordinating the election and orientation of new members. It is also responsible for coordinating ongoing Board self-assessment and professional development that is both meaningful and practical. The committee will ensure, on behalf of the Board, any required criminal history checks on candidates, Officers and Directors are initiated in a timely manner and the results are reported to the Board. The committee shall also be vigilant, as needed, in reminding the Board, its Officers, its committees, and its individual members of the importance of complying with the Board's Bylaws, Officer and Director code of conduct, conflict of interest disclosures and any related Board policies.
- b. The Audit Committee shall assist the Board in ensuring that the school's money and assets are properly managed and accounted for, as well as safeguarded against fraud, waste, and abuse. The committee's duties include soliciting proposals from independent auditors as needed, regularly reviewing financial reports and source documents for irregularities, and confirming the timely and accurate submission of various compliance reports such as corporate tax documents and authorizer mandated financial reports. With the guidance of the Board's attorney, the committee shall also investigate allegations of financial wrong-doing by senior management and shall receive reports from senior management regarding any investigations of financial wrong-doing it is conducting of subordinate personnel.
- c. The Risk Management Oversight Committee shall assist the Board in ensuring the occurrence of sound risk management in the school (including oversight of adequate insurance coverages and policy renewal), the timely completion of background checks of staff, faculty, and volunteers, the review of campus safety plans and emergency action plans, and the oversight of related policies.

ARTICLE XIV: PARLIAMENTARY AUTHORITY

14.1. Parliamentary Authority. The rules contained in the current edition of *Robert's Rules of Order, Newly Revised* shall govern Board meetings in which they are applicable and in which they are not inconsistent with these Bylaws and any special rules of order the Board may adopt.

ARTICLE XV: AMENDMENTS

15.1. Bylaws. These Bylaws may be amended, altered, or repealed and new Bylaws may be adopted by the Board of Directors by an affirmative vote of two-thirds (2/3) of current Directors at any meeting of the Board, provided the full text of the proposed amendment, alteration, or repeal was submitted in writing at the previous regular meeting. Bylaws may not be amended without providing reasonable prior written notice to the Barney Charter School Initiative of Hillsdale College and receiving the approval of the School's authorizer.

15.2. Articles of Incorporation. The Articles of Incorporation of the School may be amended at a regular or special meeting of the Board by an affirmative vote of two-thirds (2/3) of current Directors, provided specific notice of the proposed amendments of the Articles was submitted in writing at the previous regular meeting. The Articles of Incorporation may not be amended without providing reasonable, prior, written notice to the Barney Charter School Initiative of Hillsdale College and receiving the approval of the School's authorizer.

ARTICLE XVI: BOOKS AND RECORDS

16.1. Books and Records. The Board shall keep complete books and records of accounts and minutes of Board of Director proceedings and committees authorized by the Board of Directors. All books and records shall be kept in written form or in a form capable of being converted into writing within a reasonable period of time.

16.2. Annual Reports. As necessary, the Board shall file an annual report containing information required by the Idaho Department of State.

16.3. Inspection Rights. Every Director shall have the right, at any reasonable time, to inspect the Corporation's books, records, documents, and physical properties as permitted by applicable federal, state or local law. These inspection rights do not extend to records that are confidential under law including, but not limited to, private student records.

ARTICLE XVII: CONTRACTS, LOANS AND DEPOSITS

17.1. Contracts. The Board may authorize any Officer or Officers, agent or agents to enter into any contract or execute and deliver any instrument in the name of and on behalf of the School; such authority may be general or confined to specific purposes.

17.2. Loans. No loans shall be contracted for, or on behalf of the School, and no evidence of indebtedness shall be issued in the name of the School unless authorized by a resolution

of the Board. Such authority shall be confined to specific instances. No loan shall be made to any Officer or Board member of the School.

17.3. Checks, Drafts and Notes. All checks, drafts, or other orders for the payment of money and all notes or other evidence of indebtedness issued in the name of the School shall be signed by a minimum of two Officers or agents of the School as designated by the Board. Separation-of-duties policy will be maintained for monetary matters to separate disbursement and payment of funds from review or reconciliation of accounts and ledgers. Duties will be designated among Board members by assignment from the Board President. All checks, drafts, or other orders for payment of money, notes, or other evidence of indebtedness or encumbrances of school funds issued in the name of the School shall only occur within the confines of explicit Board policy.

17.4. Deposits. All funds of the School not otherwise employed shall be deposited to the credit of the School in such banks, trust companies, or other custodians located in the State of Idaho as selected by the Board. The Board must verify the existence of such accounts on an annual basis.

17.5 Fiscal Affairs: The fiscal year of the Corporation shall be from 1 July to 30 June.

ARTICLE XVIII: CONSTRUCTION

18.1 Construction and Definitions. Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in Idaho Statute, Title 30, Chapter 30, Idaho Nonprofit Corporation Act shall govern the construction of these Bylaws. Without limiting the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both a Corporation and an individual person. The captions and headings in these Bylaws are for convenience of reference only and are not intended to limit or define the scope or effect of any provisions.

ARTICLE XIX: INDEMNIFICATION

19.1 General. To the full extent authorized by law, the Board shall authorize the School to pay or cause to be paid by insurance or otherwise, indemnification of any Director, Officer, employee, or agent, or former Director, Officer, employee, or agent of the School, against expenses actually and necessarily incurred by such person in connection with the defense of any action, suit, or proceeding in which that person is made a party by reason of being or having been such Director, Officer, employee or agent, except in relation to matters as to which that person shall have been adjudged in such action, suit or proceeding to be liable for negligence or misconduct in the performance of a duty. The foregoing indemnification shall not be deemed exclusive of any other rights to which an indemnitee may be entitled under any bylaw, agreement, resolution of the Board of Directors or otherwise.

19.2 Expenses. Expenses (including reasonable attorneys' fees) incurred in defending a civil or criminal action, suit, or proceeding may be paid by the Board in advance of the final disposition of such action, suit, or proceeding, if authorized by the Board, upon receipt of an undertaking by or on behalf of the indemnitee to repay such amount if it shall ultimately be determined that such indemnitee is not entitled to be indemnified hereunder.

19.3 Insurance. The Board may purchase and maintain insurance on behalf of any person who is or was a member, Director, Officer, employee, or agent against any liability asserted against such person and incurred by such person in any such capacity or arising out of such person's status as such, whether or not the School would have the power or obligation to indemnify such person against such liability under this Article.

CERTIFICATE OF BYLAWS I certify that I am the initial agent of Kootenai Classical Academy, Inc., an Idaho Nonprofit Corporation, and that the foregoing Bylaws, constitute the Bylaws of such corporation.

IN WITNESS WHEREOF, I have signed my name to this Certificate

As of this 17th day of April, 2021.

By: [Signature]
Dr. Edward Kaitz, President of the Governing Board, Kootenai Classical Academy, Inc.

Attest: [Signature]
Dr. Rachel Kaitz, Secretary of the Governing Board, Kootenai Classical Academy, Inc.

The undersigned Secretary of Kootenai Classical Academy, Inc. hereby attests that the foregoing By-Laws represent a true and correct copy of the By-Laws adopted by the Kootenai Classical Academy, Inc. Governing Board at a duly noticed meeting.

[Signature]
Dr. Rachel Kaitz, Secretary

STATE OF IDAHO
COUNTY OF Kootenai
The Foregoing instrument was acknowledged before me this April 17, 2021 by

[Signature]
Dr. Edward Kaitz, President of the Governing Board, Kootenai Classical Academy, Inc.

[Signature]
Capt. Marcel LeBlanc, Vice President of Governing Board, Kootenai Classical Academy, Inc.

Benjamin Kettle
Mr. Ben Kettle, Treasurer of the Governing Board, Kootenai Classical Academy, Inc.

Rachel Kaitz
Dr. Rachel Kaitz, Secretary of the Governing Board, Kootenai Classical Academy, Inc.

Renee Burgers
Mrs. Renee Burgers, Director of the Governing Board, Kootenai Classical Academy, Inc.

Michael P. Burgess
Mr. Michael Burgess, Director of the Governing Board, Kootenai Classical Academy, Inc.

Kirsten LeBlanc
Mrs. Kirsten LeBlanc, Director of the Governing Board, Kootenai Classical Academy, Inc.

Robby Miles
Mr. Robby Miles, Director of the Governing Board, Kootenai Classical Academy, Inc.

Michael Cook
Notary Public



Printed name: MICHAEL COOK

My Commission Expires:
4-8-25

Appendix C: Board of Directors & Petitioning Group

Edward Kaitz, Ph.D.

741 S. Fairmont Loop, Coeur d'Alene, Idaho 83814
208-699-7333, eekaitz@nic.edu

"I have to say I was taken aback at the skill and mastery with which he orchestrated content and student understanding of very complex materials and ideas. It was apparent from the opening moments of the course that Ed teaches using the Socratic method. I don't know that I have ever, in almost thirty years in education, witnessed such a skillful and seamless application of inquiry teaching."

Carol Lindsay, Former Chair,
Social Sciences Division, NIC

"I'd like to compliment the good professor for his ability to present and defend each philosophy as a truth unto itself. And his genuine passion for the subject that came across so well in his lectures. I can say with all honesty that I am a more complete person in December than I was in August."

NIC Student Fall 2012,
Introduction to Philosophy

"[He is committed] to the rigors of philosophical study, not as a purely academic discipline, but...as part of a more universal quest for wisdom. I have heard him praised by the very brightest students for the energetic way in which he...furthers growth in thinking..."

Profile

Successful and engaging college philosophy & humanities professor with over twenty years of national and international teaching experience. Experience developing course improvements in humanities programs across the curriculum. Strong background in the history of western and eastern philosophy and literature, as well as in the broad range of philosophical investigation, including ethics, politics, human nature, logic, and economics. Extensive experience working with diverse groups of people in academic, corporate and cross-cultural environments.

Education**Ph.D. Philosophy and Religion**

California Institute of Integral Studies, San Francisco, CA (2008)

Dissertation Topic: "The Virtue of Courage in Confucius and Mencius: With Comparisons to Hindu and Classical Greek Philosophies" Ph.D. Advisor: Dr. Yi Wu

M.A. Philosophy

(summa cum laude, and with distinction)
University of Colorado, Boulder, CO. 1993

Thesis Topic: "The Search for Gotthold Lessing"

B.A. Political Science/ Russian

(magna cum laude)
University of California, Berkeley, CA. 1983

Language Study

University of California, Berkeley: Russian, Classical Chinese.
Monterey Institute of International Studies: Russian Language.

Teaching Experience

My goal as a teacher has always been to make the classroom experience an adventure in ideas that is inspirational, challenging, and exciting for the students. Creating passion for the great ideas from all parts of the world helps students to meet and surpass the very highest standards as well as helps to stimulate a lifelong journey of self-discovery.

Teaching Positions:

- Philosophy Instructor (Tenured):**

North Idaho College, Coeur d'Alene, Idaho. 2007 - Current. Courses Taught: Introduction to Philosophy, Asian Philosophy, Political and Social Philosophy, Physical and Virtual Realities, Logic, History of Ancient Philosophy, History of Modern Philosophy.

Erasmio Leiva, Ph.D., Professor of Theology, USF

"It is a rare, and extremely special occurrence, when something as simple as a required Ethics class can change someone's views on life. [You] possess the ability to encourage without judgment or injection...of personal beliefs."

USF Student
Fall 2006, Ethics

"...by far I have learned more in your class than I have my entire life...it definitely shows you love what you do."

USF Student
Fall 2006, Ethics

"Your profundity and ability to induce wonder and curiosity is quite remarkable...you are able to reintroduce a sense of play and excitement in the realm of philosophy...."

USF Student,
USF Great Books Program
Spring 2001, Ancient Philosophy

"Edward Kaitz set himself apart with his passion, teaching style and knowledge...His expertise, personality and overall course structure, gave me a passion for Asian Philosophy that has extended far beyond the classroom"

USF student, Asian Philosophy,
Summer 2006

- **Adjunct Professor of Philosophy/Humanities:** University of San Francisco Department of Philosophy, 1998 to 2007. San Francisco, CA Courses Taught: Asian Philosophy, Ethics, Great Philosophical Questions, Metaphysics, and Philosophy of the Human Person.

University of San Francisco, St. Ignatius Institute Great Books Program. 2000 to 2002. San Francisco, CA Courses Taught: Ancient Philosophy, Classical Cultures of Asia and the Middle East, Expository Writing, Logic.
- **Philosophy Instructor.** Skyline Community College. 2001 to 2007. San Bruno, CA Courses Taught: Asian Philosophy, World Religions, Introduction to Philosophy, History of Western Philosophy, Ethics, Critical Thinking.
- **Philosophy Instructor.** Notre Dame de Namur University. 2006 to 2007. Belmont, CA Courses Taught: Social and Political Philosophy, Ancient Philosophy, Introduction to Philosophy, Moral Problems.
- **Philosophy Instructor:** Canada College, Fall 2006. Redwood City, CA. Courses Taught: Introduction to Philosophy.
- **Philosophy Instructor:** Front Range Community College, Boulder, CO. 1995-1996 Courses Taught: Introduction to Philosophy.
- **Economics/English Instructor.** Institute for International Relations. 1994. Hanoi, Vietnam Courses Taught: Lecturer in English and Economics for Vietnamese diplomats in a program sponsored by the Ford Foundation and the Economics Institute of Boulder, Colorado.
- **Expository Writing Instructor.** University of Colorado, Boulder, CO. 1991-1995 Courses Taught: Expository Writing Instructor for minority students accepted provisionally through a University bridge program.
- **Teaching Assistant.** Department of Political Science, University of Colorado, Boulder, CO. 1983-1985 Courses TA'd: American Political Systems, Comparative Politics.

Academic & Cultural Endeavors

"He is an intelligent, incredibly hardworking, enthusiastic, and authentic man. He is able to teach almost all of the Liberal Arts and is a respected and revered teacher. I can think of only two or three teachers who have his ability to communicate the truth to students and have them respond with such loyalty to both him and his teaching."

John Galten, Former President, Campion College, San Francisco

"I would like to formally thank you for teaching this class. In the beginning I was well on guard against subjective opinions, indoctrinations of any kind, or any kind of attacks on others' beliefs. I am extremely happy and GRATEFUL that you taught this class in a balanced, fair, and engaging way. I thoroughly enjoyed this class and just thought I would let you know that you opened my mind to thinking in new ways."

NIC student 2012
Introduction to Philosophy

"Thank you very much for your time, wisdom, and enthusiasm. I can honestly say that you have single handedly renewed my interest for academics and I won't forget the experiences in your classes."

NIC Student 2011, Capitalism in Western Thought

Exhibit and Fundraising Co-coordinator: William Joiner Center for the Study of War and Social Consequences, University of Massachusetts, Boston. 1997.

- Provided the Vietnamese paintings that were exhibited at the Brush Gallery in Lowell in September 1997 and at the gallery at Suffolk University in June 1997.

Diplomatic Escort/Translator: Ford Foundation/ Economics Institute, Boulder, CO. 1996.

- Led Vietnamese academic delegation on a study tour of curriculum programs at Bentley College; University of Massachusetts, Boston; Northeastern University; Harvard University; Georgetown University; University of Colorado, Boulder; San Francisco State University and the University of California, Berkeley.
- Facilitated meetings with top professors, deans, university presidents and the Vietnamese delegation at the various schools.
- Arranged guided tours and accompanied delegation in meetings with senior officials at the Federal Reserve Bank of Boston and at World Bank offices in Washington D.C.

NW Philosophy Conference, 2015: Served as Conference Co-coordinator for the 67th annual Northwest Philosophy Conference on October 9/10. Duties included organizing all aspects of conference preparation (meals, keynote speaker, hotels, transportation, reading scholarly papers and organizing speaker sessions, funding, programs, scheduling, etc.) The conference attracted about 100 scholars from the U.S. and abroad.

NW Philosophy Conference, 2015: North Idaho College. Presented a paper in Ethics entitled: "Epictetus and Embroidered Slippers: The Place of Luxury in Moral, Social, and Political Life."

NW Philosophy Conference, 2014: Central Washington University. Served as Session Chair for "Social and Political Philosophy" presentations. I also presented a paper entitled "Gandhi's Conservatism."

NW Philosophy Conference, 2013: Pacific University, Oregon. Served as Session Chair for "Social and Political Philosophy" presentations. I also presented a paper on conceptions of despotism in Tocqueville and Plato.

Book Review: American Philosophical Association Reviewed "The Beautiful Risk of Education" by education Philosopher Gert Biesta for the 2014 publication of "Teaching Philosophy" – an APA scholarly journal.

"I also just wanted to let you know how much I have enjoyed your classes this last school year, they've been my favorite. I think you have done an exceptional job teaching them. I really appreciate how you really looked at each perspective equally, without revealing any bias's of your own."

NIC student, 2011.

"The instructor's knowledge of the subject matter seemed nearly limitless.

He never shied from answering questions or going deeper into the subject to illustrate a point.

His methods were concise and illuminating, displaying a great desire for the student to critically understand the material. Out of the classes I have taken at NIC I consider this one to be absolutely invaluable to my pursuit of knowledge and greatly responsible for instilling a thirst for truth in me. I believe every student should take this class."

NIC student evaluation for course in Political Philosophy, Fall 2013

"Ed was one of my best teachers yet in college. He makes me want to succeed."

CU Boulder Expository Writing student evaluation, Spring 1996

American Indian Advisory Committee: North Idaho College. Committee member dedicated to the academic success of our many American Indian students here in N. Idaho.

NIC Philosophy Club Advisor: Advisor for NIC's Philosophy Club. Responsibilities include giving lectures, advising philosophy majors, sponsoring and organizing events, and most importantly helping our students with conference paper presentations at the annual NW Undergraduate Philosophy Conference at Pacific University in Oregon. The NIC Philosophy Club has won the campus wide "Club of the Year" award for the past three years.

FET Evaluator: Faculty evaluator for NIC tenure candidates.

Corporate and Other Related Experience

From the plant floor to the football field, I managed teams of diverse personalities which taught me skills I now use in the classroom. The capacity to simplify, organize and present ideas in an engaging, efficient way, to moderate and lead discussions and to motivate and focus others in a common purpose, are key abilities I've adapted from my experiences in the private sector for the betterment of my teaching and scholarly pursuits.

Plant Management Experience:

- **Plant Manager.** Cohan Seafood. 1997 to 1999, Pier 33, San Francisco, CA
- **Quality Control/HACCP Director.** H & N Seafood. 1999 to 2000, San Francisco, CA
- **Plant Manager.** Premier Roasters. 2000 to 2001, San Francisco, CA

Other Relevant Experience:

- **Translator/Interpreter.** Dr. Michael Robicheaux. 1987 - 1990. Bayou LaFourche, LA. Liaison and translator for Vietnamese refugees seeking medical attention.
- **Commercial Fisherman.** Louisiana Longline, Inc. 1987 to 1990. Bayou LaFourche, LA. Worked as a longline fisherman on the Vietnamese longline boats in the Gulf of Mexico.
- **Football Coach (Defensive Coordinator).** Aptos High School. Summer/Fall 1983. Aptos, CA.
- **CDA Junior Tackle Football – head coach.** Coeur d'Alene, Idaho. Fall 2014, Fall 2015, Fall 2016, Fall 2017
- **CDA Little League Baseball – head coach.** Coeur d'Alene, Idaho. Spring 2015

"Ed Kaitz has been the most effective writing instructor I have encountered at CU after having three writing courses. I've learned a lot in this class because Ed went out of his way to help students learn and understand the process of writing well. He made himself readily available and cares a lot about his students and the quality of their writing."
 CU Boulder Expository Writing student evaluation, Fall 1995

"I really enjoyed having this instructor because his teaching methods were effective and he was an interesting person as a whole - he was always on a positive perspective in any way possible."
 CU Boulder Expository Writing student evaluation, Spring 1995

"Ed has to be one of the best teachers that I've had so far during my college career."
 CU Boulder Expository Writing student evaluation, Spring 1996

"He's an excellent T.A. He tries hard and wants us to learn. I was never into Poli Sci until I had him as a teacher."
 CU Boulder Comparative Politics student evaluation, Fall 1985

- CDA Buzzsaw Youth Wrestling – assistant coach. Coeur d'Alene, Idaho. Spring 2018

Languages

It has been years but I am still somewhat proficient in spoken and written Vietnamese and written classical Chinese. I can still read and understand some Russian.

References:

Mr. Ted Tedmon
 Associate Professor of Business, North Idaho College
 Coeur d'Alene, Idaho
 (208) 769-3260
rtedmon@nic.edu

Dr. Raymond Dennehy
 Professor Emeritus of Philosophy
 University of San Francisco
 San Francisco, CA
 (415) 722-7745
dennehyr@usfca.edu

Mr. Brad Schell
 Entrepreneur, Inventor of "Sketchup" 3D modeling program
 1815 Mapleton Ave
 Boulder, CO 80304
 (303) 444-8889
itswindy@gmail.com

Jean Marcel LeBlanc

1200 Turbine Drive
Sandpoint, Idaho 83864

Office: 208.920.2852
m.leblanc@daher.com

Mobile: 757.816.6749

Director of Engineering • Program Manager • Chief Test Pilot

- Charged with the leadership of Kodiak Aircraft Company's multi-disciplined team of aviation professionals who design and support the world's most capable and reliable aircraft of its kind.
- Responsible for the execution of Kodiak Aircraft Company's strategic development programs.
- Plans, conducts, and reports on all development flight test for Kodiak Aircraft Company.

Professional Strengths:

- Leadership
- Strategic Planning
- Program Management
- Operations
- Risk Mitigation
- Matrix Organizations
- Aircraft Systems Development
- Aircraft Test
- Process Development

Education:

- Diploma, Naval War College (Executive Leadership School), College of Distance Education – 2007
- Master of Science (with Honors), Systems Engineering, Johns Hopkins University – 2002
- Bachelor of Science (with Merit), Marine Engineering, US Naval Academy - 1992

Special Training:

- FAA Designated Engineering Representative, Test Pilot – (In-work, expected completion 2021)
- UNC Keenan-Flagler Business School, Understanding Government-Industry Relationship
- US Defense Acquisition University, Program Management, Level III
- US Naval Postgraduate School, Aviation Safety Officer (Accident Investigation & Analysis)
- US Naval Test Pilot School, Graduate, Class 117

Special Skills:

- Engineering Test Pilot (Kodiak Aircraft Company); Production Test Pilot (Kodiak Aircraft Company); Air Transport Pilot (US FAA); Test Pilot (US Navy)
- Public Speaking
- Public Presentation
- Written communication
- Organizational development

Professional Associations:

- Society of Experimental Test Pilots (International)
- Tailhook Association (US Navy)
- Aircraft Owners and Pilots Association (US)

Awards:

- Legion of Merit; Meritorious Service Medal; Bronze Star (US Navy)
- Naval Air Force Atlantic Fleet Attack Pilot of the Year (US Navy)
- Test Pilot of the Year (VX-23, US Navy)

Ben Kettle

2970 North Stagecoach Dr.
Post Falls, ID 83854

Cell: (208) 819-1984

Email: bkettle@gmail.com

Skills/Strengths:	Fund accounting - Risk Management - Leadership - Collaboration - Public Speaking
Relevant Experience:	<p>Staff Accountant - WJC Financial</p> <ul style="list-style-type: none"> • Prepare Tribal governments for Single Audits • Financial statement and Schedule of Expenditures of Federal Awards (SEFA) preparation • Evaluation of processes and internal controls • Face-to-face client interaction • General ledger maintenance, journal entry processing, and reconciliation preparation • Analyze, interpret, and review balance sheet and financial reports <p>Audit and Tax Intern - Harris CPA's</p> <ul style="list-style-type: none"> • Audited 401k's, 403b's, colleges and private companies • Prepared taxes for individuals, non-profits, and private companies • Composed blog entries and educational literature <p>Portfolio Manager, Funded Trader, Financial Analyst - Barker Capital Management</p> <ul style="list-style-type: none"> • Managed \$600,000 endowment fund via futures, options, and equities • Sector lead for Consumer Discretionary, Financials, High Divided, Precious Metals, and Technology divisions • Prepared individual trade and portfolio-wide risk management strategies • Created, analyzed, executed, and managed complex derivative strategies
Education:	<p>Master of Accountancy Graduated December 2019 University of Idaho. Moscow, Idaho</p> <p>Bachelor of Science, Accounting Graduated December 2018 University of Idaho. Moscow, Idaho</p> <p>Associate of Science, Business Administration Graduated August 2017 North Idaho College. Coeur d'Alene, Idaho</p>
Awards/Honors/Interests:	<ul style="list-style-type: none"> • President of Beta Alpha Psi • Portfolio Manager of Barker Capital Management Group • Funded Trader for Barker Capital Management Group • Magna Cum Laude from University of Idaho • Dean's list student every semester of academic career • Member of Phi Theta Kappa

Rachel Elizabeth Kaitz, DBA

741 Fairmont Loop, Coeur d'Alene, ID 83814 • 208-699-7339 • kaitzfam@yahoo.com

"Rachel is an outstanding faculty member and colleague. She has been a key contributor in creating a better learning and working climate for students. Her frequent participation and strong support of the College, the Division, and the community have led to program improvement and greater recognition of LCSC. Our reputation has been significantly enhanced due to her high level of commitment."

Tenure recommendation excerpt, Individual Tenure and Promotion Committee, LCSC

"I would like particularly to emphasize [Rachel's] contributions to professional accreditation through LACBE and her collegiality, a proactive quality that helps foster positive relationships between programs and between Lewiston and Coeur d'Alene."

Mary Flores, Dean for Academic Programs, LCSC

"Rachel has demonstrated genuine kindness and caring for each individual student. I think that it is hard to find a person more dedicated to ensuring the success of their pupils in any profession. Rachel is the type of instructor that students don't want to disappoint and are willing to put forth extra effort to meet her expectations."

Warrior Service Award, LCSC

Profile

Successful and engaging university marketing instructor with 26 years national and international teaching experience. Strong background in marketing theory, advertising, consumer behavior, integrated marketing communication, International Business and consumer research. Experienced working with diverse groups of people in academic, corporate and cross-cultural environments.

Education

D.B.A. Emphasis: Marketing

Golden Gate University, San Francisco, CA. 2005

Dissertation Topic: Credit Confusion: How much do consumers really understand and benefit from Truth-in-Lending disclosures?

M.B.A. Emphasis: Marketing

University of Colorado, Boulder, CO. 1992

MBA association member, American Marketing Association

A.B.J. Major: Public Relations/Advertising Minor: Business

University of Georgia, Athens, GA. 1990

University of California, Berkeley, Organizational Behavior (graduate transfer) course. Summer 1991

Academic Memberships and Conferences

Professional memberships

Sigma Beta Delta society of the Association of College Honor Societies (faculty advisor and chapter President), International Accreditation Council for Business Education, Regional Secretary (current) President (2014-2015), Vice President (2013-2014), National Foundation for Consumer Credit - Certified Consumer Credit Counselor (1996-2001), National Association of Mortgage Brokers (1994-1996)

Professional meetings & conferences attended

IACBE National or Regional Conferences, 2012-2019 (Regional Conference Organizer 2013 and 2014). Various AMA Virtual Conferences: Digital Marketing October 2-3, 2018, The Year Ahead in Marketing January 29-30, 2019, Design Thinking April 23-24, 2019, Lewiston or Coeur d'Alene

"Rachel is a passionate, enthusiastic presence in the classroom. She provides consistent, professional examples and implements interactive application exercises and field assignments.

Rachel's engaging style encourages students to relate theories and concepts to relevant, real world experiences in their daily lives."

Delta Heath-Simpson, Ph.D.
LCSC Professor and past Chair,

"Thank you so much for serving on my promotion committee...It is a true pleasure to know you and to work with you. I continually admire your experience, wisdom & servant's heart"

Jenny Scott, LCSC Colleague
January 2019

"Thank you for making my time at LCSC and as President of the BSO such a great experience. I have learned and grown so much and truly consider it to be one of the best things I've ever done. I wouldn't have done half of it without your help and support. You make the business program GREAT at LCSC-CdA."

Kenny Dodge, BSO President
LCSC-CDA, 2016

"Very prepared, extremely good examples. Obviously loves the topic and is up to date on current info. Always bearing out class opinion. Seems interested in individuals and diversity. The most passionate teacher at GGU."

Course Evaluations
Introduction to Marketing
Fall 2002

Advisory Board Meetings 2010-present. Cd'A Think Big Festival August 24-25, 2018. Project Management Workshop - Fred Pryor Seminars May 10, 2016. Northwest Philosophy Conference 2015 & 2016. University of Idaho Women's Leadership Conference: The Power of We March 25, 2015. Small Business Development Center Leadership Conference: Beyond You 2014. National Foundation for Consumer Credit (Annual Conference 1996-2001), National Association of Mortgage Brokers Annual Conference (1994-1995)

Papers presented

"Exploding the Comfort Zone: Using the Socratic Method in the Business Classroom to Improve Critical Thinking Skills for Distance Learners" Accepted for presentation at the 2017 Region 7 IACBE Conference in Kellogg, ID

"Graduating Pink Unicorns and Purple Squirrels" Accepted for presentation with colleagues at the 2013 Region 7 IACBE Conference in Coeur d'Alene, ID

"Operational Assessment" Accepted for presentation at the 2013 Region 7 IACBE Conference in Coeur d'Alene, ID

"Truth in Lending Disclosures: Realities of Consumer Impact and Implications for Public Policy," Accepted for presentation at the Marketing Science Conference, June 2006.

Teaching Experience

My real passion as a marketing instructor is to help students make connections between their everyday lives and experiences, and between the formal and informal theories of marketing, psychology, and economics that drive consumer culture. I want students to finish my classes with a greater awareness of their roles as consumers and with a practical understanding of the components that make up the fields of promotion and communication. I benefited tremendously as a teacher from early exposure to a Bay Area student body that originated from every corner of the globe as well as from the community resources that allowed for visits to premier advertising agencies, consumer research and focus group organizations, and to a host of distinguished guest speakers who were frequent contributors to my in person courses. My own international experience and work in a variety of fields also helps me to relate well to a wide range of students.

Teaching Positions

- **Professor of Business:**
Lewis Clark State College, Coeur d'Alene, ID, 2019 to present. Committee Memberships: Capstone

"[Rachel] once again proved through her planning, preparation, classroom presence, organization, methodology, approach, interactions with students, application of content, etc. that her performance is a deserved 5 (model) in all areas being rated. Rachel continues to expertly cover textbook content, involve students in interactive exercises and provide constructive feedback and encouragement along the way. Her presence, touch of humor, voice inflection, energy, affability and teaching approach garner evident student engagement and respect."

LCSC Peer Evaluation
Prof. Debbie Goodwin
Sept 2017, Senior Capstone

"..You always do work the agency can be proud of and you convey the best possible image of our organization to the community and our clients. I especially appreciate your ability to accept constant change and pressure with a sense of humor & team spirit."

Monica Steinisch,
Marketing Director
and co-founder,
BALANCE

"Your presentation on the evening of October 27 was outstanding. Lots of information, some humor, and best of all was the good information you provided. Several employees have passed on their compliments regarding your presentation skills, and just what a terrific speaker you were, keeping the attention of the audience. We were really pleased with this first workshop...and look forward to more of them."

Donald Martin
Collection Manager

Committee, Marketing Committee, Strategic Marketing Committee Professional Memberships: 2020 Regional Vice President, International Accreditation Council for Business Education 2019 Regional Secretary, International Accreditation Council for Business Education. Other duties: Faculty co-advisor: Business Student Organization – CDA, Chapter President, Sigma Beta Delta Honor Society, Student Academic Advising, Golf Tournament, Career Fair & Career Discovery Night steering committees.

- **Associate Professor of Business:**

Lewis Clark State College, Coeur d'Alene, ID, 2014 to 2019. Committee Memberships: Faculty Senate, Communication, Capstone Committee, Marketing Committee, Hiring and tenure committees for CDA faculty and staff, Library Director and Division Chair. Professional Memberships: American Marketing Association (chapter advisor), 2014-15 Regional President, International Accreditation Council for Business Education. Other duties: Faculty co-advisor: Business Student Organization – CDA, Faculty co-advisor Sigma Beta Delta Honor Society, Student Academic Advising, Golf Tournament, Career Fair & Career Discovery Night steering committees. LCSC Warrior Service Award recipient. Quality Matters Certified. Teaching & Learning Center Advisory Board.

- **Assistant Professor of Business:**

Lewis Clark State College, Coeur d'Alene, ID, 2010 to 2014. Committee Memberships: Grievance, Student Affairs, Faculty Senate. Professional Memberships: Regional Vice President, International Accreditation Council for Business Education. Other duties: Faculty advisor: Business Student Organization – CDA, Student Academic Advising, Golf Tournament and Meet the Firms steering committees. Four time LCSC Warrior Service Award recipient.

- **Visiting Assistant Professor:**

Lewis Clark State College, Coeur d'Alene, ID, 2009 to 2010. Courses Taught: Consumer Behavior, Leadership, International Business. Responsible for all course design and execution in both online (Blackboard), intensive and standard formats.

- **Adjunct Faculty/ Business Instructor:**

North Idaho College, Coeur d'Alene, ID, 2008 to 2009. Courses Taught: Principles of Marketing, Introduction to Business and Microeconomics. Experience teaching via interactive video conference. Responsible for all course design and execution. Presented a Financial

Santa Clara County Federal
Credit Union

"Rachel is an excellent communicator...She expresses herself clearly and always in a positive manner. She is very flexible and can switch gears quickly and smoothly, enabling her department to successfully meet the needs of current and potential clients. Whatever the organization's needs, Rachel welcomes new challenges and dives right in whenever there is something to be done."
Performance review,
BALANCE, 2001

Fitness seminar to the faculty and staff of North Idaho College in January, 2009.

- **Adjunct Faculty/Marketing Instructor:** Golden Gate University, San Francisco, CA, 1997 to 2009. Courses Taught: Introduction to Advertising, Integrated Marketing Communications, Copywriting, Introduction to Marketing, and Consumer Behavior. Experienced teaching both graduate and undergraduate level courses in cyber (e-college), web-enhanced, and in-person formats. Responsible for course design and execution for all classes in all modes.
- **Economics/English Instructor.** National Economics Institute. 1993. Hanoi, Vietnam Lecturer in English and Economics for Vietnamese Professionals in a program sponsored by the Ford Foundation and the Economics Institute of Boulder, Colorado.

Corporate and Other Related Experience

Relevant corporate experience in the advertising and public relations fields includes both large and small organizations, consumer research and familiarity with a variety of media. In the private sector, I sold, designed and pitched print advertising, created publicity for radio station programming and events, and for financial services as an add-on to employee benefit packages. At various times, I have secured grant funding and created publicity and advertising for college promotion and local events such as the annual LCSC "Alumni and Friends Golf Scramble" and our "Career Discovery Night" event for Coeur d'Alene business majors.

Relevant Professional Experience

- **Owner.** Bluefin Investments, LLC. San Francisco, CA. 2005-2007. Investment and property management company handling residential and commercial holdings in four states. CA Corporation dissolved upon move to ID.
- **Independent Research Consultant.** Providian Financial Corporation. 2001 - 2002. San Francisco, CA. Hired to study effects of truth in lending disclosures on consumers' awareness of credit terms.
- **Program/Account Manager.** Balance (a division of Consumer Credit Counseling Service serving Employee Assistance Programs, Credit Unions and Banks), 1998 - 2002. San Francisco, CA. Responsible for all contracts, utilization reports and invoicing. Extensive public speaking, media relations, database development and counselor training nationwide.
- **Financial Counselor.** Balance/Consumer Credit Counseling Service. 1996-1997. San Francisco, CA. Assisted clients with money management issues including budgeting, debt reduction, housing education, bankruptcy,

- foreclosure prevention and financial crisis management. Conducted presentations and workshops on homebuying programs, credit management, and basic budgeting skills.
- **Mortgage Broker.** Cornerstone Mortgage Corporation. 1994 – 1996. Boulder, CO. Originated over \$11 Million in conventional, FHA and VA mortgages. Member: Colorado Association of Mortgage Brokers/National Association of Mortgage Brokers
 - **Interim Business Manager.** CadZooks, Inc. 1994. Boulder, CO. Designed and implemented a comprehensive marketing program for a CAD based software product, worked with partners to determine pricing policy and create the annual budget, redesigned software documentation and converted it to an on-line help directory, automated the company accounting/payroll system. This company was ultimately sold to Autodesk.
 - **Property Manager.** Cook Business Properties. 1990 – 1991. Denver, CO. Leased residential property, arranged maintenance and repair work, supervised tenants and managed the rent collection process.
 - **Public Relations Director.** WUOG 90.5FM. 1990. Athens, GA. Managed a 5 person staff, negotiated and administered a \$7,000 budget, designed and implemented all station related promotional activities, coordinated an extensive listenership survey.
 - **Radio Producer/DJ:** The Spoken Word. WUOG 90.5FM. 1988 – 1989. Athens, GA. Produced a weekly hour-long radio program featuring my interviews of local writers. Hosted an hour long jazz show each week.
 - **Advertising Sales.** Macon Telegraph and News. Summer 1989. Macon, Georgia. Commended for selling over \$30,000 in advertising in three months, designed layouts, developed new accounts and serviced existing accounts.

Outside References:

- Dr. Luther Maddy, Chair of Business, Lewis Clark State College, Lewiston, ID (208) 792-2702
- Mr. Casey Wilhelm, Business Administration Instructor, Business and Professional Programs, North Idaho College, Coeur d'Alene, ID. (208) 769-3262
- Ms. Monica Steinisch, Freelance marketing consultant, 469 28th Street, San Francisco, CA. (Former employer, Balance/CCCS) (415) 648-4046

Renee S. Burgess

Post Falls, ID 83854

Home: (208) 773-3572 Cell: (208) 262-6729 Email: reenebur@gmail.com

SUMMARY OF QUALIFICATIONS:

Education: Bachelor of Science-Business Administration/Managerial Accounting

Experience: Accounting, human resource management, payroll, education administration, office manager, executive secretary, legal assistant, financial services.

Skills: Proficient in Word, Excel, Access, PowerPoint, Publisher, Adobe Acrobat/JavaScript, Skyward School Management Software, QuickBooks Accounting Software.

WORK EXPERIENCE:**Senior Human Resource Specialist**

Post Falls School District, Post Falls, Idaho: 2018-Present.

- Direct/perform a broad range of human resource functions: employee records management, benefits administration, fingerprinting/background checks, and employee leave administration, including PTO, sick leave bank and FMLA leave.
- Maintain legal compliance for all aspects of employment and benefits administration.
- Coordinate onboarding of all new employees and substitutes, act as main point of contact for employee questions and concerns.
- Calculate wages for employee position changes and terminations; coordinate with payroll department regarding employee wage or position changes, terminations and new hires.
- Assist the director of business services with salary schedules/employee compensation, applicant interviews and various employee communications.
- Craft employee benefit and information presentations; coordinate yearly employee benefit fair and new employee breakfasts.
- Develop/maintain district human resources website.

Accounting Specialist/Medicaid Program Specialist

Post Falls School District, Post Falls, Idaho: 2013-2018.

Concurrent Accounting Specialist and Medicaid Program Specialist positions

Accounting:

- Process accounts payable: 400 to 750 invoices totaling six to seven figures each month.
- Manage vendor relations; provide timely and accurate processing of invoices, purchase orders, payments, credit memos, and expense reports.
- Oversee 1099 reporting; maintain contractor liability insurance compliance.
- Complete driver's education program reports and reimbursement requests.
- Maintain compliance with District, GAAP, and GASB accounting standards.
- Assist with audits for accounts payable and transportation departments.

Medicaid Program:

- Design, implement and manage school-based Medicaid program, including development of service detail report forms, tracking system for provider qualifications, and accounting/billing system to ensure that claims are complete, accurate, and paid as submitted.
- Provide guidance and problem-solving strategies for teachers, therapists and other district and contracted providers to ensure regulatory compliance for Idaho Medicaid program.

Renee S. Burgess

Page 2

Office Manager, Full-Charge Bookkeeper, Payroll/Human Resources

Saint Dominic School, Post Falls, Idaho: 1994-2012.

- Manage payroll and human resource functions including compensation and benefits, teacher contracts, criminal history checks, and worker's compensation claims.
- Provide complete accounting services for private K-12 school including accounts payable/receivable, general ledger, and fixed asset tracking.
- Complete full financial statements including depreciation schedules; W-2, 1099, and donor contribution reporting; manage year-end audits.
- Coordinate business oversight and accounting during multiple construction projects culminating in multi-million dollar campus; including construction payroll and sub-contractor management.
- Assist with school licensing, student/teacher immigration compliance, and various legal issues.
- Coordinate extensive fundraising campaigns.
- Direct part-time office workers and volunteers.

Financial Services: 10+ years in the banking industry: accounting, operations oversight, employee training and customer service.

EDUCATION:

Bachelor of Science, Business Administration/Managerial Accounting, May 2018.

Minor: Human Resource Management.

Lewis-Clark State College. Coeur d'Alene, Idaho.

GPA: 3.97/4.0

Honors: *summa cum laude*, Provost Award, Outstanding Student of the Year 2017/2018
Business Division, Presidential Honors, Ambassador Honor Society

Associate of Arts, Liberal Arts, May 2017.

Lewis-Clark State College. Coeur d'Alene, Idaho.

GPA: 4.0/4.0

Honors: Presidential Honors

Associate of Science, Business Administration, May 2016.

North Idaho College. Coeur d'Alene, Idaho.

GPA: 4.0/4.0

Honors: Phi Theta Kappa Honor Society, Dean's List

VOLUNTEER EXPERIENCE:

- Board Member/Director: Kootenai Classical Academy
- Board Secretary/Treasurer: Sunrise Terrace II Homeowners Association
- Board Secretary/Treasurer: Immaculate Conception Chapel
- LCSC Business Student Organization; Phi Theta Kappa and LCSC Ambassador Honor Societies
- AARP Volunteer Tax Preparation Aide
- Spokane Youth Symphony/4-H Youth Group volunteer

MICHAEL BURGESS

PHONE: (208) 773-3572 • EMAIL: SITIENTES@GMAIL.COM
2083 N WESTWIND DRIVE • POST FALLS, ID 83854

SUMMARY

Machinist with 40 years experience in machining primarily for the Semiconductor industry. Dedicated husband and father. Leadership experience with multiple volunteer organizations, non-profit boards, and local, regional and state political organizations.

EXPERIENCE

1997 – Present Honeywell Electronic Materials Spokane, WA

Machinist

- NC Programmer/Operator, Precious Metals Machinist. Numerous safety and process improvement awards, “Bravo” awards.
- Honeywell Closed Door Machining Team: eliminated handwork and chip tending with innovative programming.
- Five years Safety committee representative, WIP Wipe Out Team Leader & Presenter. (Local and Regional People’s Choice Awards)

1993 – 1997 Wilson Tool Company Spokane, WA

Machinist

- Utilized various CNC and Hydraulic Chuckers to machine parts utilized in fueling nuclear reactors, cement testing gauges, and various other applications.
- 1981 – 1993 SemiTool Inc Kalispell, MT
- *Machinist/CNCL Programer/Operator*
- Programed and operated CNC Double Turret Lathe, NC Mills, and manual lathes to machine parts using specialty materials for equipment used in the computer chip manufacturing industry.
- 1973 – 1981 Various Kalispell, MT; Missoula, Mt
- *Exploration, Surveying, Machine Operator, Construction*
- John Mansville Company, Exploration: Assistant to Project Manager, Land Surveying, Sample and Data Collection
- Konshur Custom Milling: Machine Operator
- Bob Stoltz Enterprises: Cement Construction Crew Chief

EDUCATION

1975 – 1978	University of Montana	Missoula, MT
<i>Geology</i>		
1973 – 1975	Flathead Valley Community College	Kalispell, MT
<i>General Studies, Science</i>		
1969 – 1973	Flathead High School	Kalispell, MT
	Gonzaga Preparatory	Spokane, WA

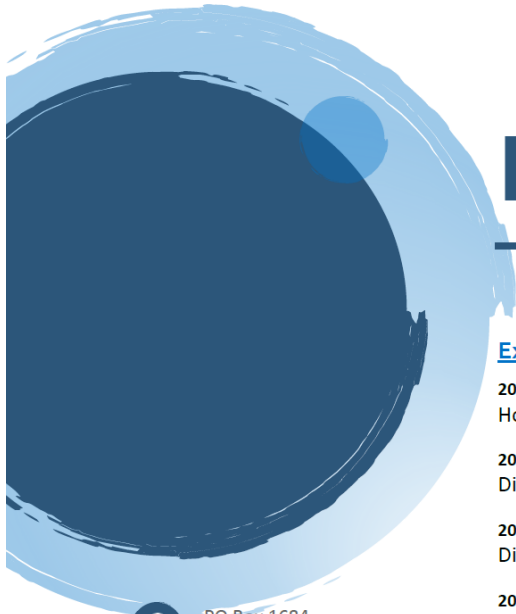
LEADERSHIP

- State Central Committee, Idaho GOP: 2018-Present
- Chairman: Legislative District 3, Idaho GOP: 2018-Present

- Region One Central Committee: 2018-Present
- KCRCC Executive Committee: 2018-Present
- Precinct Committeeman: Idaho GOP Kootenai County Precinct 28 2014-Present (second largest)
- Budget Committee Member: Kootenai County GOP 2018-2019
- Chairman: Kootenai County Legislative Committee 2017-2019
- Vice-Chairman: Legislative District 3, Idaho GOP 2014-2018
- Convention Delegate: Idaho State GOP 2014, 2016, 2018, 2020
- Board President: Sunrise Terrace II Homeowners Association, (~32 homes) Kalispell MT (two years)
- Board Vice-President: Sunrise Terrace II Homeowners Association Kalispell MT (one year)
- Board President: Immaculate Conception Chapel, Kalispell, MT
- Conservation Instructor Training, Philmont Scout Ranch

VOLUNTEER WORK

- Board Secretary: Holy Name Society, Immaculate Conception Church, Post Falls, ID (five years)
- Assistant Scout Master, Co-Founder: Catholic Scouts of America
- Schola Cantorum Mens Chant and Polyphonic Choir: Immaculate Conception Church
- Volunteer Security Detail: Spokane Youth Symphony
- Volunteer Instructor: International Bowhunting Instruction Course for the State of Montana (five years)
- Head Coach, SemiTool Softball Team (one year)
- Assistant Coach, SemiTool Softball Team (two years)



Kirsten LeBlanc

Experience

2005–Present

Home Educator • L'Ecole Classique

2017–2019

Director • Sandpoint North Classical Conversations

2013–2016

Director • Lexington Park Classical Conversations

2012–2013

Tutor • Huntingtown Classical Conversations

1997-1999

English Teacher • Mayport Middle School

Began teaching career as an English teacher at Mayport Middle School (a public school in Mayport, Florida). Began home-educating children in 2005. Transitioned to teaching classical education in co-op setting beginning in 2012. Advanced to directing various Classical Conversations campuses. Directing included hiring and training staff, budgeting, purchasing supplies, and equipping and supporting parents.

Education

University of North Florida, Jacksonville, Florida

- Bachelor of Arts in Communication
- Florida-Certified Secondary School Teacher (lapsed)

Communication

Prepared seminars for prospective parents. Trained tutors and parents in home-education, including classical model.

Leadership

Directed various Classical Conversations campuses. Started the Lexington Park Classical Conversations campus, still flourishing in its eighth year of ca.

References

Available Upon Request



PO Box 1684
Sandpoint, ID 83864



757-831-2529



kirsten@sabreas.com

Robert D. Miles

2017 N Syringa Drive, Coeur d'Alene, ID 83814
208-818-6426
miles.robby@gmail.com

Qualifications & Skills

- * Building strong relationships with students to establish a trusting classroom community and inspiring student confidence and self-worth.
- * Emphasizing technology integration with current and evolving classroom instructional techniques including: blogs, interactive whiteboards, mobile apps, cooperative video editing, collaborative documents, and web 2.0 tools.
- * Creative in adapting lessons to meet the needs of students with diverse learning abilities and students from diverse cultural backgrounds.

Professional Experience

AP Social Studies Instructor: Coeur d'Alene Charter Academy 2012-2019

- * Work within the AP curriculum to support students achievement of a college level understanding in various content areas through rigorous course study. Highest student AP Government pass rate of 90%, with an average pass rate of 72%
- * Emphasize Project Based Learning and "real world" experiences through student use of technology, scenario based decision making, and collaborative exercises
- * Created an open system of communication through parental contact via email, phone, and classroom website to encourage parental involvement

Courses Taught

- ✓ AP US Government
- ✓ College Prep Ancient History
- ✓ Civics
- ✓ Eastern Hemisphere Geography

Additional Activities/Responsibilities

- * Model United Nations Advisor, One 1st Place & Five 2nd Place Trophies 2014-2019
- * Head Track Coach 2013

AP Social Studies Instructor/Department Chairman: Stevensville High School, Stevensville, Montana 2009-2012

- * Co-taught/developed an integrated curriculum for AP US History & AP English Language to enhance student knowledge across the curriculum
- * Encouraged student use of historical reasoning, critical thinking, and research skills to construct personal meaning through written and oral presentations
- * Conducted Action Research and applied research based teaching methods to reach students in the most appropriate manner

Courses Taught

- | | |
|---|------------------------------|
| ✓ AP US Government | ✓ World Cultures & Geography |
| ✓ AP American Studies
(AP US History & AP Eng. Language) | ✓ Montana State History |
| ✓ AP World History | ✓ Junior English |
| ✓ American Government | ✓ Freshman English |

Robert D. Miles 2

	Additional Activities/Responsibilities	
	* Assistant Speech & Debate Coach	2011-2012
	* Stevensville Morning Tutor	2011-2012
	* Key Club & National Honors Society Adviser	2011-2012
	* Montana Digital Academy Adviser	2010-2011
	* Assistant Track Coach	2009-2011
	Student Teaching	2008- 2009
	* Ferris High School, Spokane Public Schools, Spokane, Washington, AP World History (10th), Honors World History (9th), Current World Affairs (12th)	
	Multicultural Field Experience: Coeur d’ Alene Tribal School (Kindergarten-Eighth grade), Desmet, Idaho	January 2009
	* Implemented culturally responsive and age-appropriate pedagogical strategies.	
Education	Master of Arts in Teaching , Whitworth University, Spokane, Washington. <i>Pi Lambda Theta International Honor Society and Professional Association in Education</i>	July 2009
	Bachelor of Arts in History , Eastern Washington University, Cheney, Washington. Minor: Religious Studies <i>Magna Cum Laude, GPA: 3.7</i> <i>Outstanding History Student Award; top 10% of department</i>	June 2007
	Associate of Arts , North Idaho College, Coeur d’ Alene, Idaho. <i>GPA: 3.6</i> <i>Phi Theta Kappa International Honors Society</i>	May 2005
	Professional Development	
	* US District Court of Montana Judicial Institute	April 2012
	* Ravalli County Curriculum Consortium Contributor	August 2011
	* Teaching American History Summer History Consortium ✓ <u>Winner of Top 10 Project Based Learning Lessons for the Consortium</u>	July 2010
	* Montana Behavioral Initiative Training	June 2010
	* Advanced Placement US Government and Politics Training	2009 & 2018
	Professional Memberships	
	* ASCD	2008-2013
	* Phi Delta Kappa	2009-Present
	* Pi Lambda Theta	2009-Present
Certification	Idaho Education Credential , Renewed 2017	
	Endorsements: Social Studies (5-12) History (5-12)	
	Content Assessment: Social Studies: Content Knowledge, Praxis II Test # 0081, January 2008	
	Accredited Interscholastic Coach: National Federation of State High School Associations, Track & Field, April 2013	

Robert D. Miles 3

Additional Experiences

- ✓ Montana Army National Guard, Quartermaster Executive Officer, 1Lientenant 2011-2019
- ✓ Stevensville High School Teacher Technology Trainer August 2011
- ✓ Stevensville High School Morning Tutorial Teacher 2011-2012

Petitioning Group:

Eric and Scott are members of our petitioning group. Eric is considered a Founding Member and has been instrumental in our property search, curriculum evaluation, school marketing and outreach. Scott has been instrumental in translation and in outreach to underserved populations in Kootenai County.

Eric Mack:

Associated Professor of Mathematics, North Idaho College, Coeur d'Alene, Idaho. Eric has been studying and teaching mathematics for more than eighteen years. He has been creating interactive models to engage students at a deeper level than mere book exercises for most of that time. He is deeply interested in reviving the ancient and medieval Quadrivium as a vibrant pre-philosophical/interdisciplinary approach to learning mathematics socratically. For four years, he has taught courses titled The Mathematics and Aesthetics of Musical Tuning. He has taught at the University of Idaho, Yakima Valley Community College, and at North Idaho College.

Scott Estes:

Associate Professor of Spanish at North Idaho College in Coeur d'Alene. Scott received his B.A. degree in Spanish and ESL from Eastern Washington University in Cheney, WA. Scott went on to finish his M.A. degree in Teaching at Salem State University in Salem, MA. Scott has been very generous with his time in helping KCA with its Hispanic outreach goals.

Appendix D: Organizational Chart and School Administration

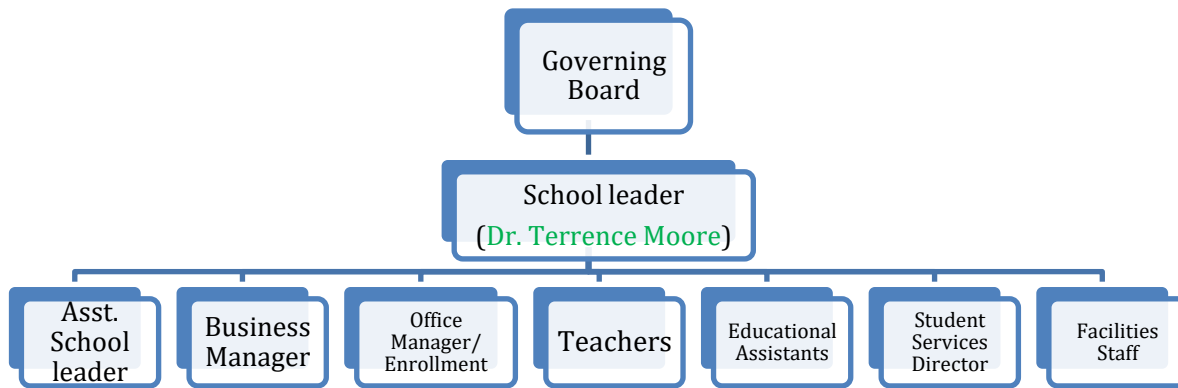


Figure 1110: School Administration and Organizational Chart

Terrence O. Moore, Ph.D.

curriculum vitae brevis

terrence.o.moore@gmail.com

Education: Ph.D. in History, **University of Edinburgh**, 1999
 Dissertation: “The Enlightened Curriculum: Moral Education in Eighteenth-Century Britain,”

Supervisor: Nicholas Phillipson

A.B., **University of Chicago**, 1990, in History with honors
 Classes with Allan Bloom, Ralph Lerner, Nathan Tarcov, Jerald C. Brauer, Mark Kishlansky, François Furet, et alia

Military Service: Lieutenant, **United States Marine Corps**, 1990-1993
 Deployed to Somalia, Operation Restore Hope, 1992-3

College Professor: **Hillsdale College**, Department of History, 2008-2014
 Emily Daugherty Award for **Teaching Excellence**, Hillsdale, 2010
Ashland University, Department of History, 1999-2001

School Leader: BLUUM Fellow & Founding Principle, **Kootenai Classical Academy**, 2020-2021
 Founding Principal, **Ascent Classical Academy**, 2018-2019
 Founding Principal, **Atlanta Classical Academy**, 2014-2017
 Founding Principal, **Ridgeview Classical Schools**, 2001-2008

School Reformer: **Hillsdale College Barney Charter School Initiative**, 2008-2014

Original architect and Senior Academic Advisor

Now more than twenty-five schools across the nation.

One of the leading **critics** of the **Common Core**, 2013-2014

Testified before seven legislative bodies, spoke around the nation to citizen groups & on talk radio and video.

Major publications ***The Story-Killers: A Common-Sense Case Against Common Core***

& videos: Sold several thousand copies, 125 reviews on Amazon.

“The Story-Killers,” Hillsdale College Kirby Center, 113,000 views

“Wimps & Barbarians,” *Claremont Review of Books* cover article,

Read by national talk show hosts, blogged extensively.

“A Classical Education for Modern Times” (founding document of Ridgeview Classical, used by dozens of classical schools)

“Doing a Texas Two-Step Around Education Reform,” *The Wall Street Journal*, 9 March 2013 (with Charles Cook of ResponsiveEd).

“Not Harvard Bound: Some of America’s Most Promising Youth Are Seeking an Even Higher Education,” *Touchstone*.

“The Principal’s Perspective,” articles published in *The Coloradoan*, on

The Ashbrook Center website, quoted in *The Washington Times*.

Reviews in *Claremont Review of Books* on Bill Bennett and E.D. Hirsch.

“More than a Million Mogadishus . . .” quoted by Laura Ingraham, et al.

Editor of George Turnbull, *Observations upon Liberal Education*,

Liberty Fund Natural Law and Enlightenment series.

For other articles/videos, search **Terrence Moore & classical education**

Hillsdale College Online Courses:

“The Reagan Revolution,” The American Heritage course

“Benjamin Franklin and the Enlightenment,” The American Heritage

“The Roman Legacy: The Roman Republic” The Western Heritage

“The Greek Legacy: The Birth of Philosophy,” The Western Heritage

TEACHING

Ascent Classical:

Leadership, for tenth-graders, second semester

Western Civilization II: Middle Ages to the Enlightenment, 10th Grade, 2 sems.

Lectures and readings (on chivalry, Queen Elizabeth, *Tom Sawyer*, Enlightenment, etc.)

to all grades (K-10) throughout the school.

Atlanta Classical:

Moral Philosophy, Fall 2016 (full course), to high school sophomores (graduation req.)

Leadership, Spring 2015, 2016 (full course, team taught w. assist. principal) to freshmen

“Donuts and Glory” Presidential Quiz, mornings before school to third—sixth graders

Adam the Codebreaker: the First-Ever Phonics Adventure Novel (forthcoming) read to

second-graders once or twice weekly

“**Franklin Fridays**,” guest lectures in ninth-grade **Composition** classes on Ben Franklin Guest lectures on Chivalry (fourth grade), Frederick Douglass (fifth), the Enlightenment (sixth), and *Lord of the Flies* (eighth)
Heroes, Spring 2015 (full course), elective for eighth graders

Hillsdale College:

Western Heritage to 1600 (core class for all entering freshmen), Fall 2008-Fall 2010
American Heritage (core class for all entering freshmen), Spring 2009-Spring 2013
The Nature and History of Manhood (elective), Fall 2009, Spring 2012, Fall 2013
The Enlightenment in Britain and America, Fall 2008, Fall 2010, Fall 2012
Western Heritage Since 1600, Spring 2010, Spring 2013
The Renaissance, Spring 2011

Ridgeview Classical:

Moral Philosophy I: The Great-Souled Man, every year from 2002-2008
Moral Philosophy II: Love and Courtship (one of these two required for graduation)
American Political Philosophy (elective for juniors and seniors)
The Art of Rhetoric (elective for freshmen and sophomores)
Courses taught once: **Western Civilization II** (sophomores), **Heroes** (middle school elective), **Core 7 English** (7th graders, I took over for one semester)
Various lectures on chivalry, writing, Socrates, Benjamin Franklin, etc. in the elementary

Ashland University:

Courses in **Western Civilization, Enlightenment, French Revolution, 20th Century**

Languages: Reading knowledge of French. Studied at the University of Geneva Institute. Fairly competent reader and speaker of German. Studied in Vienna and as an undergraduate. Understanding of how Latin works; have overseen excellent Latin programs. Working on Spanish.

References:

Dr. Mickey Craig, former Dean of Social Sciences & Chair of Politics, Hillsdale College, mcraig@hillsdale.edu
Dr. Paul Rahe, Professor of History, Hillsdale College, prahe@hillsdale.edu
Phil Kilgore, first Director of Barney Charter School Initiative, philkilgore@yahoo.com
Steve Lambert, Colonel, USAF (ret.), Assistant Principal, Atlanta Classical Academy, now Founding Principal, Treasure Valley Classical Academy, Fruitland, ID
Kim Miller, Founder of Ridgeview Classical Schools, rscfounder@gmail.com

Other references available if needed.

Appendix E: Educational Service Provider

At this time Kootenai Classical Academy is not using an Educational Service Provider

Appendix F: Supporting Documentation

F.1 Letters to District Superintendents

Post Falls School District 273

Superintendent Dena Naccarato: dnaccarato@sd273.com

18 February 2021

Dear Superintendent Naccarato:

Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, which includes a budget, a preliminary facilities plan, and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022. The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.

Regards,

Ed Kaitz

Ed Kaitz, Ph.D.
Founding Board Chair
info@kootenaiclassical.org

Kootenai School District 274Mr. Wade Pilloud Superintendent, wpilloud@sd274.com

18 February 2021

Dear Mr. Pilloud:

Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, a copy of a budget for a school of similar size whose model we shall also follow, and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022. The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.

Regards,

*Ed Kaitz*Ed Kaitz, Ph.D.
Founding Board Chair
info@kootenaiclassical.org

Kootenai School District 274Mr. Wade Pilloud Superintendent, wpilloud@sd274.com~~31 October 2020~~~~Dear Mr. Pilloud:~~

~~—Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, a copy of a budget for a school of similar size whose model we shall also follow, and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022.~~

~~The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.~~

Regards,

Ed Kaitz

Ed Kaitz, Ph.D.
Founding Board Chair
info@kootenaiclassical.org

Coeur d'Alene School District 271

Dr. Steven Cook, Superintendent

Phone: 208-664-8241 | Email: scook@cdaschools.org

18 February 2021

Dear Dr. Cook:

Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, a copy of a budget for a school of similar size whose model we shall also follow, and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022. The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.

Regards,

Ed Kaitz

Ed Kaitz, Ph.D.

Founding Board Chair

info@kootenaiclassical.org

Lakeland Joint School District 272
Dr. Becky Meyer, Superintendent: becky.meyer@lakeland272.org

18 February 2021

Dear Dr. Meyer:

Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, a copy of a budget for a school of similar size whose model we shall also follow, and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022. The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.

Regards,

Ed Kaitz

Ed Kaitz, Ph.D.
Founding Board Chair
info@kootenaiclassical.org

Lakeland Joint School District 272
Dr. Becky Meyer, Superintendent: becky.meyer@lakeland272.org

~~31 October 2020~~

~~Dear Dr. Meyer:~~

~~—Greetings. As per Idaho Statute 33-5205b, attached you will find a petition as currently drafted for a charter school that may draw students from your district. More specifically, we are attaching a copy of the petition, a copy of a budget for a school of similar size whose model we shall also follow,~~

~~and a copy of board governance bylaws. The school's plan is to open in the Fall semester of 2022. The founders of the school are seeking an authorizer. We are planning for the location of the school to be in Kootenai County, most likely in the general Post Falls area. If invited, we should be happy to attend a district board of trustees meeting to answer any questions you or the board may have. Please contact me at the e-mail address listed below. Thank you for your attention to this matter.~~

Regards,

Ed Kaitz

Ed Kaitz, Ph.D.
Founding Board Chair
info@kootenaiclassical.org

F.2 Flyers, Website and Promotional Materials

(English and Spanish Language Versions)

KOOTENAI CLASSICAL ACADEMY
an American Classical Education

Sign our petition to bring the Classics to Kootenai County!
facebook/kootenaiclassical.org
kootenaiclassical.org

A K-12, tuition-free public charter school, (opening K-6) in the Fall of 2022

Join our information sessions at *Cabela's*. See the KCA website, Facebook & Instagram for dates and times.

Kootenai Classical Academy admits students of any race, color, and national or ethnic origin.

An American Classical Education

THE MISSION of Kootenai Classical Academy is to train the minds and improve the hearts of young people through a classical, content-rich education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue in a disciplined, yet dynamic environment.

To accomplish this mission, we teach . . .

- reading and spelling through explicit phonics;
- good penmanship and cursive;
- a mastery of the English language through formal grammar, word origins to build vocabulary, and Latin;
- math facts, mental math, and the larger concepts behind mathematical thinking;
- great stories and works of literature through close reading and Socratic discussion;
- the trials and triumphs of Western Civilizations;
- the "Great American Story" and the civic responsibility we have inherited;
- the facts and concepts of the biological and physical sciences; and
- the Beauty found in the fine arts.

In addition to thriving in this classical curriculum, students . . .

- learn to build good character through explicit training in the moral virtues;
- are taught by subject-matter experts who care deeply about the education of young people and the future of this nation; and
- participate and live at home in a dynamic learning environment that includes robust extra-curricular activities and sports.

kootenaiclassical.org * info@kootenaiclassical.org

KOOTENAI CLASSICAL ACADEMY
an American Classical Education

Firme nuestra petición para traer los Clásicos al Municipio de Kootenai!
facebook/kootenaiclassical.org
kootenaiclassical.org

Una escuela pública Chárter K-12 con matrícula gratuita, ofreciendo los grados K-6 a partir de otoño de 2022

Particpe en nuestras sesiones informativas que se llevarán a cabo en *Cabela's*. Visite el sitio web de KCA, Facebook e Instagram para las fechas y horas

Kootenai Classical Academy recibe a todos alumnos sin importar su raza, color y origen nacional o étnico.

Una Educación Clásica Americana

EL OBJETIVO de Kootenai Classical Academy abarca la formación de las mentes y la mejoría de los corazones de los jóvenes a través de una educación clásica rica en contenido que se enfoca en las artes liberales y ciencias, con instrucción en los principios del carácter moral y virtud cívica en un ambiente disciplinado pero dinámico.


Para cumplir con este objetivo, enseñamos...

- la lectura y ortografía mediante la fonética explícita la
- buena caligrafía y cursiva;
- un dominio del idioma inglés a través de la gramática formal, los orígenes de las palabras para construir vocabulario y el idioma latín;
- hechos matemáticos, la matemática mental y los conceptos más amplios detrás del pensamiento matemático;
- grandes historias y obras literarias a través de la lectura atenta y la discusión socrática;
- las pruebas y triunfos de la civilización occidental
- la "Gran Historia Estadounidense" y la responsabilidad cívica que hemos heredado;
- los hechos y conceptos de las ciencias biológicas y físicas; y
- la belleza que se encuentra en las bellas artes.

Además de prosperar en este currículo clásico, los estudiantes. . .

- aprenden a desarrollar un buen carácter a través de un entrenamiento explícito en las virtudes morales
- son enseñados por expertos en la materia quienes se preocupan profundamente por la educación de los jóvenes y el futuro de esta nación; y
- participan y se sienten como en casa en un ambiente de aprendizaje dinámico que incluye actividades extracurriculares y deportes robustos.

kootenaiclassical.org * info@kootenaiclassical.org



[About](#)
[Our Board](#)
[Curriculum](#)
[KCA Updates](#)
[Contact](#)

THE CLASSICS ARE COMING

HELP US BRING THE CLASSICS TO KOOTENAI COUNTY IN 2022

[SIGN OUR PETITION](#)

JOIN US FOR A MEET AND GREET!

JOIN US FOR A MEET AND GREET!

MEET THE BOARD AND OTHER INTERESTED FAMILIES! CHECK KCA UPDATES FOR MORE INFORMATION

[SIGN UP HERE](#)

“THE OBJECT OF EDUCATION IS NOT TEACH US TO LIVE BUT TO BE ACTIVE.”

— PLATO

LEARN MORE

OUR BOARD

The founding board of KCA is made up of eight members who live in the Coeur D'Alene/Dus Falls area. Three of the board members are college professors, one is a former school teacher, one is a successful school administrator and five have home schooled their children at various points and all care deeply about the quality of education in Northern Idaho.

[MEET THE BOARD](#)

NEXT STEPS

KCA will open in the fall semester of 2022. We are planning to open for grades K-6, and to add a grade each year until reaching K-12. KCA will be centrally located in Kootenai County to allow access for families coming from Coeur D'Alene, Poca Hills, and the surrounding communities. Location and transportation possibilities are in the works.

[CONTACT US](#)

OUR MISSION

Kootenai Classical Academy will be a K-12 public, open-enrollment, tuition-free charter school. KCA will follow an American classical model whose mission is:

To train the minds and improve the hearts of young people through a classical, counter-culture education in the liberal arts and sciences, with immersion in the principles of moral character and civic virtue in an orderly and disciplined, yet dynamic, environment.

Kootenai Classical Academy admits students of any race, color, and national or ethnic origin.

CHARTER NETWORK AFFILIATION

Kootenai Classical Academy has executed a Letter of Intent to explore an affiliation with Idaho State College's Barney Charter School Initiative.

Read more about the Barney Charter School Initiative [here](#).





VENDOR APPLICATION FOR THE NORTH IDAHO STATE FAIR

Date: 4/29/21
 Name of Contact Person: Edward Kaitz
 Business Name: Kootenai Classical Academy
 Mailing Address: P.O. Box 901 City: Post Falls State: ID Zip: 83877
 Business Phone: () _____ Cell: (208) 699-7333 Home: () _____
 E-mail: info@kootenaiclassical.org Website: www.kootenaiclassical.org
 References of fairs or similar events and the year(s) you have participated: Deborah Newton @ Cabela's
Cabela's (Information Sessions) - Debi Newton
Lincoln Day Dinner (CdA Resort) - Barbara Heddon or Beverly G info@kootenai.org

List or attach a list of all products you plan to display or sell. Space may be assigned on the basis of this list. Please be specific. Any items in your space not authorized on your contract are subject to removal at the discretion of Management.

Our purpose is to raise awareness of our new classical charter school. We will be distributing flyers and giveaways and will raffle books.

Inside Space: _____ Outside Space:

If you need more than 110 volt, 20 amp power, please state your electrical needs: _____ volts, _____ amps

PLEASE ATTACH DRAWING OR PHOTOGRAPH OF PLANNED BOOTH

We agree to abide by the rules and regulations stipulated in the actual contract, should space be available. By signature of this application, I hereby authorize Kootenai Fairgrounds to secure information concerning references listed.

Edward Kaitz

 Signature

KCA
Board Chair

 Title

Note: This application is not an offer of space. Do not send any money. Applicant will be notified should space be available. The Kootenai County Fairgrounds does not offer exclusivity and reserves the right to assign space in accordance with other vendor products.

F.3 List of Interested Families

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>kc***@****l.com</u>	<u>5/5/2021</u>
<u>As***@****l.com</u>	<u>5/4/2021</u>
<u>ss***@****sss</u>	<u>3/10/2021</u>
<u>Br***@****l.com</u>	<u>11/6/2020</u>
<u>Ti***@****l.com</u>	<u>3/10/2021</u>
<u>an***@****l.com</u>	<u>5/4/2021</u>
<u>kc***@****l.com</u>	<u>5/5/2021</u>
<u>pr***@****e.com</u>	<u>11/6/2020</u>
<u>jp***@****o.com</u>	<u>3/10/2021</u>
<u>to***@****l.com</u>	<u>5/5/2021</u>
<u>Ti***@****l.com</u>	<u>3/10/2021</u>
<u>Kp***@****l.com</u>	<u>11/6/2020</u>
<u>mc***@****l.com</u>	<u>5/5/2021</u>
<u>dm***@****l.com</u>	<u>5/5/2021</u>
<u>jp***@****o.com</u>	<u>3/10/2021</u>
<u>do***@****c.com</u>	<u>3/11/2021</u>
<u>Co***@****l.com</u>	<u>3/10/2021</u>
<u>Mr***@****l.com</u>	<u>5/5/2021</u>
<u>mc***@****l.com</u>	<u>5/5/2021</u>
<u>br***@****l.com</u>	<u>3/10/2021</u>
<u>ak***@****o.com</u>	<u>3/10/2021</u>
<u>ve***@****l.com</u>	<u>5/5/2021</u>
<u>Co***@****l.com</u>	<u>3/10/2021</u>
<u>er***@****l.com</u>	<u>5/5/2021</u>
<u>br***@****l.com</u>	<u>3/10/2021</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>ak***@****o.com</u>	<u>3/10/2021</u>
<u>me***@****l.com</u>	<u>11/12/2020</u>
<u>ka***@****o.com</u>	<u>3/10/2021</u>
<u>Ag***@****l.com</u>	<u>5/5/2021</u>
<u>br***@****l.com</u>	<u>3/10/2021</u>
<u>Co***@****o.com</u>	<u>5/5/2021</u>
<u>Bk***@****l.com</u>	<u>3/10/2021</u>
<u>ka***@****o.com</u>	<u>3/10/2021</u>
<u>Bk***@****l.com</u>	<u>3/10/2021</u>
<u>to***@****l.com</u>	<u>5/5/2021</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>Bk***@****l.com</u>	<u>3/10/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>kk***@****l.com</u>	<u>11/14/2020</u>
<u>Je***@****l.com</u>	<u>5/5/2021</u>
<u>nm***@****l.com</u>	<u>5/5/2021</u>
<u>to***@****l.com</u>	<u>5/5/2021</u>
<u>ja***@****l.com</u>	<u>11/14/2020</u>
<u>ji***@****l.com</u>	<u>3/11/2021</u>
<u>Ra***@****l.com</u>	<u>5/5/2021</u>
<u>Je***@****l.com</u>	<u>5/5/2021</u>
<u>Te***@****l.com</u>	<u>3/12/2021</u>
<u>ke***@****l.com</u>	<u>3/11/2021</u>
<u>ji***@****o.com</u>	<u>5/5/2021</u>
<u>ji***@****l.com</u>	<u>3/11/2021</u>
<u>Id***@****l.com</u>	<u>3/11/2021</u>
<u>se***@****l.com</u>	<u>3/11/2021</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>ke***@****l.com</u>	<u>3/11/2021</u>
<u>be***@****e.com</u>	<u>11/15/2020</u>
<u>nm***@****l.com</u>	<u>5/5/2021</u>
<u>sv***@****l.com</u>	<u>5/5/2021</u>
<u>se***@****l.com</u>	<u>3/11/2021</u>
<u>Da***@****e.com</u>	<u>5/6/2021</u>
<u>im***@****l.com</u>	<u>3/11/2021</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>nm***@****l.com</u>	<u>5/5/2021</u>
<u>Na***@****o.com</u>	<u>11/16/2020</u>
<u>Da***@****l.com</u>	<u>3/11/2021</u>
<u>mc***@****l.com</u>	<u>5/5/2021</u>
<u>im***@****l.com</u>	<u>3/11/2021</u>
<u>fs***@****l.com</u>	<u>11/16/2020</u>
<u>dm***@****l.com</u>	<u>5/5/2021</u>
<u>ca***@****l.com</u>	<u>5/5/2021</u>
<u>Da***@****l.com</u>	<u>3/11/2021</u>
<u>Ja***@****l.com</u>	<u>11/16/2020</u>
<u>ve***@****l.com</u>	<u>5/5/2021</u>
<u>Vo***@****o.com</u>	<u>5/5/2021</u>
<u>dm***@****l.com</u>	<u>5/5/2021</u>
<u>sn***@****l.com</u>	<u>5/5/2021</u>
<u>mm***@****t.com</u>	<u>3/11/2021</u>
<u>jo***@****l.com</u>	<u>5/5/2021</u>
<u>ve***@****l.com</u>	<u>5/5/2021</u>
<u>id***@****l.com</u>	<u>5/6/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>je***@****l.com</u>	<u>5/5/2021</u>
<u>mm***@****t.com</u>	<u>3/11/2021</u>
<u>ja***@****l.com</u>	<u>11/18/2020</u>
<u>ra***@****l.com</u>	<u>5/5/2021</u>
<u>jc***@****l.com</u>	<u>5/5/2021</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>de***@****an.io</u>	<u>11/18/2020</u>
<u>ja***@****l.com</u>	<u>3/11/2021</u>
<u>je***@****l.com</u>	<u>5/5/2021</u>
<u>ra***@****l.com</u>	<u>5/5/2021</u>
<u>Dj***@****l.com</u>	<u>3/11/2021</u>
<u>Th***@****l.com</u>	<u>3/11/2021</u>
<u>dk***@****l.com</u>	<u>5/5/2021</u>
<u>ja***@****l.com</u>	<u>3/11/2021</u>
<u>ji***@****o.com</u>	<u>5/5/2021</u>
<u>Er***@****l.com</u>	<u>3/11/2021</u>
<u>Ku***@****l.com</u>	<u>5/5/2021</u>
<u>Th***@****l.com</u>	<u>3/11/2021</u>
<u>mj***@****o.com</u>	<u>11/19/2020</u>
<u>dr***@****l.com</u>	<u>3/11/2021</u>
<u>me***@****o.com</u>	<u>5/5/2021</u>
<u>Er***@****l.com</u>	<u>3/11/2021</u>
<u>je***@****o.com</u>	<u>5/5/2021</u>
<u>ma***@****n.com</u>	<u>3/11/2021</u>
<u>la***@****d.com</u>	<u>5/5/2021</u>
<u>dr***@****l.com</u>	<u>3/11/2021</u>
<u>Sh***@****o.com</u>	<u>11/19/2020</u>
<u>do***@****c.com</u>	<u>3/11/2021</u>
<u>na***@****l.com</u>	<u>5/5/2021</u>
<u>ma***@****n.com</u>	<u>3/11/2021</u>
<u>fa***@****e.com</u>	<u>11/19/2020</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>wh***@****l.com</u>	<u>5/5/2021</u>
<u>do***@****c.com</u>	<u>3/11/2021</u>
<u>Ka***@****o.com</u>	<u>3/10/2021</u>
<u>je***@****o.com</u>	<u>3/11/2021</u>
<u>Re***@****l.com</u>	<u>5/5/2021</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>ka***@****l.com</u>	<u>11/19/2020</u>
<u>ja***@****l.com</u>	<u>5/5/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>er***@****l.com</u>	<u>5/5/2021</u>
<u>je***@****o.com</u>	<u>3/11/2021</u>
<u>Ve***@****l.com</u>	<u>11/19/2020</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>ja***@****l.com</u>	<u>5/5/2021</u>
<u>an***@****l.com</u>	<u>5/4/2021</u>
<u>Ku***@****l.com</u>	<u>5/5/2021</u>
<u>Co***@****o.com</u>	<u>5/5/2021</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>hu***@****o.com</u>	<u>11/19/2020</u>
<u>Da***@****l.com</u>	<u>3/11/2021</u>
<u>sn***@****l.com</u>	<u>5/5/2021</u>
<u>Ku***@****l.com</u>	<u>5/5/2021</u>
<u>Lo***@****o.com</u>	<u>11/20/2020</u>
<u>Je***@****n.com</u>	<u>3/11/2021</u>
<u>la***@****d.com</u>	<u>5/5/2021</u>
<u>Da***@****l.com</u>	<u>3/11/2021</u>
<u>dk***@****l.com</u>	<u>5/5/2021</u>
<u>La***@****l.com</u>	<u>3/11/2021</u>
<u>mi***@****l.com</u>	<u>5/5/2021</u>
<u>Je***@****n.com</u>	<u>3/11/2021</u>
<u>Co***@****l.com</u>	<u>3/10/2021</u>
<u>Si***@****l.com</u>	<u>3/11/2021</u>
<u>Wh***@****l.com</u>	<u>5/5/2021</u>
<u>La***@****l.com</u>	<u>3/11/2021</u>
<u>Em***@****l.com</u>	<u>11/20/2020</u>
<u>jo***@****l.com</u>	<u>5/5/2021</u>
<u>je***@****o.com</u>	<u>5/5/2021</u>
<u>Si***@****l.com</u>	<u>3/11/2021</u>
<u>To***@****l.com</u>	<u>11/20/2020</u>
<u>Id***@****l.com</u>	<u>3/11/2021</u>
<u>Hu***@****k.com</u>	<u>5/5/2021</u>
<u>jo***@****l.com</u>	<u>5/5/2021</u>
<u>mr***@****k.com</u>	<u>11/20/2020</u>
<u>Ch***@****o.com</u>	<u>3/11/2021</u>
<u>bj***@****l.com</u>	<u>5/5/2021</u>
<u>ld***@****l.com</u>	<u>3/11/2021</u>
<u>a***@****o.com</u>	<u>3/11/2021</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>jo***@****d.com</u>	<u>5/5/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>Ch***@****o.com</u>	<u>3/11/2021</u>
<u>Sh***@****l.com</u>	<u>11/20/2020</u>
<u>sn***@****l.com</u>	<u>5/5/2021</u>
<u>kc***@****l.com</u>	<u>5/5/2021</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>de***@****l.com</u>	<u>11/21/2020</u>
<u>cl***@****d.com</u>	<u>3/11/2021</u>
<u>je***@****o.com</u>	<u>5/5/2021</u>
<u>sn***@****l.com</u>	<u>5/5/2021</u>
<u>rm***@****l.net</u>	<u>11/21/2020</u>
<u>wh***@****l.com</u>	<u>5/5/2021</u>
<u>na***@****o.com</u>	<u>5/5/2021</u>
<u>cl***@****d.com</u>	<u>3/11/2021</u>
<u>bl***@****o.com</u>	<u>11/21/2020</u>
<u>la***@****d.com</u>	<u>5/5/2021</u>
<u>ch***@****l.com</u>	<u>5/5/2021</u>
<u>wh***@****l.com</u>	<u>5/5/2021</u>
<u>mj***@****l.com</u>	<u>11/21/2020</u>
<u>Jo***@****d.com</u>	<u>5/5/2021</u>
<u>st***@****o.com</u>	<u>5/5/2021</u>
<u>la***@****d.com</u>	<u>5/5/2021</u>
<u>Al***@****o.com</u>	<u>11/21/2020</u>
<u>ch***@****l.com</u>	<u>5/5/2021</u>
<u>ja***@****l.com</u>	<u>5/5/2021</u>
<u>Jo***@****d.com</u>	<u>5/5/2021</u>
<u>Je***@****l.com</u>	<u>5/6/2021</u>
<u>li***@****l.com</u>	<u>3/11/2021</u>
<u>Le***@****l.com</u>	<u>5/5/2021</u>
<u>ch***@****l.com</u>	<u>5/5/2021</u>
<u>na***@****l.com</u>	<u>11/21/2020</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>co***@****o.com</u>	<u>5/5/2021</u>
<u>li***@****l.com</u>	<u>3/11/2021</u>
<u>je***@****l.com</u>	<u>5/5/2021</u>
<u>Id***@****l.com</u>	<u>3/11/2021</u>
<u>jo***@****o.com</u>	<u>5/5/2021</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>ca***@****l.com</u>	<u>3/14/2021</u>
<u>Je***@****l.com</u>	<u>5/6/2021</u>
<u>As***@****l.com</u>	<u>5/4/2021</u>
<u>Id***@****l.com</u>	<u>3/11/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
la***@****l.com	11/22/2020
Ch***@****o.com	3/11/2021
da***@****e.com	5/6/2021
Je***@****l.com	5/6/2021
Ag***@****l.com	5/5/2021
rm***@****l.com	3/11/2021
Je***@****l.com	5/6/2021
Ch***@****o.com	3/11/2021
7r***@****l.com	11/23/2020
ji***@****o.com	5/5/2021
kn***@****l.com	5/6/2021
rm***@****l.com	3/11/2021
je***@****l.com	11/24/2020
a***@****o.com	3/11/2021
ld***@****l.com	5/6/2021
ji***@****o.com	5/5/2021
ch***@****s.com	11/24/2020
ja***@****l.com	5/5/2021
gr***@****l.com	5/6/2021
a***@****o.com	3/11/2021
id***@****l.com	11/24/2020
gr***@****l.com	3/11/2021
nw***@****l.com	5/6/2021
ja***@****l.com	5/5/2021
co***@****o.com	5/5/2021
bo***@****l.com	3/11/2021
sh***@****r.com	5/6/2021
gr***@****l.com	3/11/2021
gr***@****l.com	5/5/2021
Re***@****l.com	3/11/2021
bo***@****l.com	3/11/2021
bj***@****l.com	5/5/2021
Da***@****e.com	5/6/2021
Re***@****l.com	3/11/2021
ja***@****l.com	11/27/2020
Tl***@****l.com	3/11/2021
Da***@****e.com	5/6/2021
tw***@****d.com	11/29/2020
lb***@****l.com	3/11/2021
Tl***@****l.com	3/11/2021
jl***@****l.com	11/29/2020

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>Jm***@****l.com</u>	<u>3/11/2021</u>
<u>lb***@****l.com</u>	<u>3/11/2021</u>
<u>As***@****l.com</u>	<u>5/4/2021</u>
<u>je***@****l.com</u>	<u>3/11/2021</u>
<u>Jm***@****l.com</u>	<u>3/11/2021</u>
<u>Ka***@****l.com</u>	<u>11/30/2020</u>
<u>Dj***@****l.com</u>	<u>3/11/2021</u>
<u>je***@****l.com</u>	<u>3/11/2021</u>
<u>mg***@****e.com</u>	<u>12/1/2020</u>
<u>dk***@****y.com</u>	<u>3/11/2021</u>
<u>Dj***@****l.com</u>	<u>3/11/2021</u>
<u>el***@****o.com</u>	<u>12/1/2020</u>
<u>bo***@****l.com</u>	<u>3/11/2021</u>
<u>dk***@****y.com</u>	<u>3/11/2021</u>
<u>Da***@****o.com</u>	<u>12/1/2020</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>bo***@****l.com</u>	<u>3/11/2021</u>
<u>er***@****r.com</u>	<u>12/4/2020</u>
<u>we***@****l.com</u>	<u>3/11/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>ro***@****l.com</u>	<u>12/7/2020</u>
<u>ct***@****l.com</u>	<u>3/11/2021</u>
<u>we***@****l.com</u>	<u>3/11/2021</u>
<u>Sh***@****l.com</u>	<u>12/8/2020</u>
<u>Re***@****l.com</u>	<u>3/11/2021</u>
<u>ct***@****l.com</u>	<u>3/11/2021</u>
<u>ad***@****e.net</u>	<u>12/8/2020</u>
<u>Je***@****l.com</u>	<u>5/5/2021</u>
<u>Re***@****l.com</u>	<u>3/11/2021</u>
<u>ra***@****l.com</u>	<u>12/8/2020</u>
<u>Ch***@****l.com</u>	<u>3/12/2021</u>
<u>Je***@****l.com</u>	<u>5/5/2021</u>
<u>mo***@****o.com</u>	<u>12/8/2020</u>
<u>Mr***@****l.com</u>	<u>5/5/2021</u>
<u>Ch***@****l.com</u>	<u>3/12/2021</u>
<u>mc***@****l.com</u>	<u>5/5/2021</u>
<u>Al***@****l.com</u>	<u>3/12/2021</u>
<u>Mr***@****l.com</u>	<u>5/5/2021</u>
<u>al***@****o.com</u>	<u>12/8/2020</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>Al***@****l.com</u>	<u>3/12/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>ME***@****X.COM</u>	<u>12/8/2020</u>
<u>Wh***@****l.com</u>	<u>5/5/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>pt***@****h.net</u>	<u>12/8/2020</u>
<u>te***@****l.com</u>	<u>3/12/2021</u>
<u>Wh***@****l.com</u>	<u>5/5/2021</u>
<u>ch***@****o.com</u>	<u>12/8/2020</u>
<u>te***@****l.com</u>	<u>3/12/2021</u>
<u>te***@****l.com</u>	<u>3/12/2021</u>
<u>Ch***@****l.com</u>	<u>3/12/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>te***@****l.com</u>	<u>3/12/2021</u>
<u>kc***@****l.com</u>	<u>12/9/2020</u>
<u>Mt***@****o.com</u>	<u>3/12/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>si***@****l.com</u>	<u>3/11/2021</u>
<u>mm***@****t.com</u>	<u>3/11/2021</u>
<u>Mt***@****o.com</u>	<u>3/12/2021</u>
<u>je***@****l.com</u>	<u>12/9/2020</u>
<u>Co***@****o.com</u>	<u>5/5/2021</u>
<u>mm***@****t.com</u>	<u>3/11/2021</u>
<u>Ca***@****l.com</u>	<u>5/5/2021</u>
<u>Ca***@****l.com</u>	<u>3/14/2021</u>
<u>Co***@****o.com</u>	<u>5/5/2021</u>
<u>jo***@****l.com</u>	<u>5/5/2021</u>
<u>Re***@****l.com</u>	<u>5/5/2021</u>
<u>Ca***@****l.com</u>	<u>3/14/2021</u>
<u>wh***@****l.com</u>	<u>5/5/2021</u>
<u>RM***@****k.com</u>	<u>3/16/2021</u>
<u>Re***@****l.com</u>	<u>5/5/2021</u>
<u>ic***@****a.net</u>	<u>12/18/2020</u>
<u>Le***@****l.com</u>	<u>5/5/2021</u>
<u>RM***@****k.com</u>	<u>3/16/2021</u>
<u>hj***@****n.com</u>	<u>12/19/2020</u>
<u>Mo***@****l.com</u>	<u>3/20/2021</u>
<u>Le***@****l.com</u>	<u>5/5/2021</u>
<u>cu***@****l.com</u>	<u>3/24/2021</u>
<u>cu***@****l.com</u>	<u>3/24/2021</u>
<u>Mo***@****l.com</u>	<u>3/20/2021</u>
<u>jl***@****l.com</u>	<u>12/24/2020</u>
<u>cu***@****l.com</u>	<u>3/24/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>ve***@****l.com</u>	<u>5/5/2021</u>
<u>bc***@****l.com</u>	<u>1/2/2021</u>
<u>Be***@****l.com</u>	<u>1/2/2021</u>
<u>sa***@****l.com</u>	<u>1/6/2021</u>
<u>Ti***@****l.com</u>	<u>1/7/2021</u>
<u>pr***@****l.com</u>	<u>1/7/2021</u>
<u>cl***@****d.com</u>	<u>3/11/2021</u>
<u>da***@****i.com</u>	<u>1/8/2021</u>
<u>Mr***@****l.com</u>	<u>5/5/2021</u>
<u>na***@****l.com</u>	<u>5/5/2021</u>
<u>Je***@****l.com</u>	<u>3/11/2021</u>
<u>je***@****l.com</u>	<u>1/23/2021</u>
<u>ro***@****l.com</u>	<u>12/7/2020</u>
<u>ne***@****pm.me</u>	<u>1/28/2021</u>
<u>Al***@****l.com</u>	<u>3/12/2021</u>
<u>be***@****l.com</u>	<u>2/2/2021</u>
<u>da***@****l.com</u>	<u>3/11/2021</u>
<u>th***@****l.com</u>	<u>2/6/2021</u>
<u>Th***@****l.com</u>	<u>3/11/2021</u>
<u>Kr***@****l.com</u>	<u>2/10/2021</u>
<u>lb***@****l.com</u>	<u>3/11/2021</u>
<u>ni***@****o.com</u>	<u>2/12/2021</u>
<u>ay***@****l.com</u>	<u>2/12/2021</u>
<u>Im***@****l.com</u>	<u>3/11/2021</u>
<u>jo***@****d.com</u>	<u>5/5/2021</u>
<u>ke***@****l.com</u>	<u>2/12/2021</u>
<u>la***@****d.com</u>	<u>5/5/2021</u>
<u>Th***@****l.com</u>	<u>2/12/2021</u>
<u>La***@****l.com</u>	<u>3/11/2021</u>
<u>Ma***@****l.com</u>	<u>2/12/2021</u>
<u>Ti***@****l.com</u>	<u>2/12/2021</u>
<u>Re***@****l.com</u>	<u>5/5/2021</u>
<u>go***@****l.com</u>	<u>2/12/2021</u>
<u>Re***@****o.com</u>	<u>2/12/2021</u>
<u>to***@****l.com</u>	<u>5/5/2021</u>
<u>je***@****n.com</u>	<u>3/11/2021</u>
<u>Im***@****l.com</u>	<u>3/11/2021</u>
<u>Mo***@****l.com</u>	<u>3/20/2021</u>
<u>Bl***@****l.com</u>	<u>2/13/2021</u>
<u>RM***@****k.com</u>	<u>3/16/2021</u>
<u>Ig***@****l.com</u>	<u>2/14/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>gr***@****l.com</u>	<u>5/6/2021</u>
<u>Jo***@****l.com</u>	<u>2/14/2021</u>
<u>ru***@****l.com</u>	<u>2/14/2021</u>
<u>tr***@****l.com</u>	<u>5/5/2021</u>
<u>gr***@****l.com</u>	<u>5/5/2021</u>
<u>li***@****l.com</u>	<u>3/11/2021</u>
<u>ja***@****l.com</u>	<u>3/11/2021</u>
<u>Al***@****l.com</u>	<u>2/15/2021</u>
<u>hu***@****o.com</u>	<u>11/19/2020</u>
<u>De***@****l.com</u>	<u>2/16/2021</u>
<u>dg***@****l.com</u>	<u>2/17/2021</u>
<u>am***@****lley</u>	<u>2/17/2021</u>
<u>ma***@****l.com</u>	<u>2/17/2021</u>
<u>bl***@****l.com</u>	<u>2/18/2021</u>
<u>Su***@****l.com</u>	<u>2/18/2021</u>
<u>ju***@****k.com</u>	<u>2/18/2021</u>
<u>bo***@****l.com</u>	<u>2/19/2021</u>
<u>ch***@****l.com</u>	<u>5/5/2021</u>
<u>Je***@****l.com</u>	<u>2/20/2021</u>
<u>Nj***@****l.com</u>	<u>2/20/2021</u>
<u>st***@****o.com</u>	<u>5/5/2021</u>
<u>Kg***@****e.com</u>	<u>2/20/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>La***@****o.com</u>	<u>2/20/2021</u>
<u>Cl***@****l.com</u>	<u>2/20/2021</u>
<u>ak***@****o.com</u>	<u>3/10/2021</u>
<u>jo***@****l.com</u>	<u>2/20/2021</u>
<u>De***@****l.com</u>	<u>2/20/2021</u>
<u>Is***@****l.com</u>	<u>2/20/2021</u>
<u>Gr***@****l.com</u>	<u>3/11/2021</u>
<u>La***@****o.com</u>	<u>2/20/2021</u>
<u>Me***@****o.com</u>	<u>2/20/2021</u>
<u>Vo***@****o.com</u>	<u>5/5/2021</u>
<u>Tj***@****l.com</u>	<u>3/10/2021</u>
<u>au***@****l.com</u>	<u>2/20/2021</u>
<u>Re***@****l.com</u>	<u>3/11/2021</u>
<u>kc***@****l.com</u>	<u>5/5/2021</u>
<u>Sh***@****d.com</u>	<u>2/20/2021</u>
<u>me***@****o.com</u>	<u>5/5/2021</u>
<u>Je***@****l.com</u>	<u>5/5/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>nm***@****l.com</u>	<u>5/5/2021</u>
<u>fd***@****l.com</u>	<u>2/21/2021</u>
<u>Le***@****l.com</u>	<u>2/25/2021</u>
<u>do***@****l.com</u>	<u>2/25/2021</u>
<u>k8***@****l.com</u>	<u>2/25/2021</u>
<u>Je***@****l.com</u>	<u>2/26/2021</u>
<u>ch***@****l.com</u>	<u>2/26/2021</u>
<u>se***@****l.com</u>	<u>3/11/2021</u>
<u>dr***@****l.com</u>	<u>3/11/2021</u>
<u>Ra***@****o.com</u>	<u>2/28/2021</u>
<u>Ca***@****l.com</u>	<u>3/1/2021</u>
<u>ji***@****l.com</u>	<u>3/11/2021</u>
<u>dm***@****l.com</u>	<u>5/5/2021</u>
<u>Je***@****o.com</u>	<u>3/11/2021</u>
<u>li***@****l.com</u>	<u>3/2/2021</u>
<u>la***@****l.com</u>	<u>3/2/2021</u>
<u>Fa***@****l.com</u>	<u>3/2/2021</u>
<u>wh***@****l.com</u>	<u>3/2/2021</u>
<u>lo***@****l.com</u>	<u>3/2/2021</u>
<u>bo***@****l.com</u>	<u>3/11/2021</u>
<u>ke***@****l.com</u>	<u>3/11/2021</u>
<u>ma***@****n.com</u>	<u>3/11/2021</u>
<u>Ch***@****o.com</u>	<u>3/11/2021</u>
<u>ad***@****l.com</u>	<u>3/5/2021</u>
<u>an***@****l.com</u>	<u>3/5/2021</u>
<u>ka***@****m.biz</u>	<u>3/7/2021</u>
<u>Mo***@****l.com</u>	<u>3/7/2021</u>
<u>mt***@****o.com</u>	<u>3/12/2021</u>
<u>er***@****l.com</u>	<u>3/11/2021</u>
<u>sh***@****l.com</u>	<u>3/12/2021</u>
<u>ba***@****l.com</u>	<u>3/13/2021</u>
<u>li***@****d.com</u>	<u>3/13/2021</u>
<u>ga***@****l.com</u>	<u>3/14/2021</u>
<u>Al***@****l.com</u>	<u>3/15/2021</u>
<u>Mc***@****l.com</u>	<u>3/15/2021</u>
<u>Ka***@****l.com</u>	<u>3/16/2021</u>
<u>La***@****l.com</u>	<u>3/16/2021</u>
<u>No***@****l.com</u>	<u>3/16/2021</u>
<u>nl***@****l.com</u>	<u>3/16/2021</u>
<u>co***@****l.com</u>	<u>3/16/2021</u>
<u>Ch***@****l.com</u>	<u>3/17/2021</u>

<u>Name (Redacted)</u>	<u>Most current Survey</u>
<u>br***@****l.com</u>	<u>3/17/2021</u>
<u>kr***@****l.com</u>	<u>3/17/2021</u>
<u>Co***@****o.com</u>	<u>3/18/2021</u>
<u>sh***@****l.com</u>	<u>3/18/2021</u>
<u>Ju***@****d.com</u>	<u>3/19/2021</u>
<u>ka***@****o.com</u>	<u>3/20/2021</u>
<u>ra***@****l.com</u>	<u>3/21/2021</u>
<u>bj***@****c.com</u>	<u>3/21/2021</u>
<u>km***@****l.com</u>	<u>3/21/2021</u>
<u>sv***@****l.com</u>	<u>3/21/2021</u>
<u>kj***@****l.com</u>	<u>3/22/2021</u>
<u>co***@****l.com</u>	<u>3/23/2021</u>
<u>sv***@****l.com</u>	<u>3/23/2021</u>
<u>al***@****l.com</u>	<u>3/23/2021</u>
<u>St***@****l.com</u>	<u>3/26/2021</u>
<u>ch***@****l.com</u>	<u>3/27/2021</u>
<u>re***@****l.com</u>	<u>3/27/2021</u>
<u>fi***@****l.com</u>	<u>3/28/2021</u>
<u>mi***@****n.com</u>	<u>3/29/2021</u>
<u>am***@****l.com</u>	<u>3/30/2021</u>
<u>dr***@****l.net</u>	<u>3/30/2021</u>
<u>Ca***@****l.com</u>	<u>5/5/2021</u>
<u>ma***@****l.com</u>	<u>4/5/2021</u>
<u>fi***@****l.com</u>	<u>4/9/2021</u>
<u>Ho***@****o.com</u>	<u>4/10/2021</u>
<u>ki***@****l.com</u>	<u>4/11/2021</u>
<u>ma***@****l.com</u>	<u>5/5/2021</u>
<u>ji***@****l.com</u>	<u>4/18/2021</u>
<u>je***@****l.com</u>	<u>4/21/2021</u>
<u>jc***@****l.com</u>	<u>5/5/2021</u>
<u>cj***@****l.com</u>	<u>4/29/2021</u>
<u>am***@****e.com</u>	<u>4/29/2021</u>
<u>Ke***@****n.com</u>	<u>5/6/2021</u>
<u>ln***@****l.com</u>	<u>5/6/2021</u>
<u>le***@****l.com</u>	<u>5/5/2021</u>
<u>Ku***@****l.com</u>	<u>5/5/2021</u>
<u>jp***@****o.com</u>	<u>3/10/2021</u>
<u>Ra***@****l.com</u>	<u>5/5/2021</u>
<u>wh***@****l.com</u>	<u>5/5/2021</u>

Table F-1: Online Expressions of Interest Responses (as of 17 March)

Timestamp	Email Address (Redacted):	Telephone (Redacted):	Number of potential students:
11/6/2020 19:19	Bro*****	*** ** *695	2
11/6/2020 19:24	pro*****	*** ** *567	3
11/6/2020 21:02	Kph*****	*** ** *068	2
11/7/2020 2:34	dou*****	*** ** *350	4
11/7/2020 5:05	bru*****	*** ** *477	1
11/12/2020 10:30	eri*****	*** ** *707	2
11/12/2020 12:53	meg*****	*** ** *910	1
11/12/2020 13:04	Col*****	*** ** *334	2
11/13/2020 23:47	Bka*****	*** ** *903	2
11/14/2020	jac*****	*** ** *	3
11/14/2020 14:25	Tea*****	*** ** *660	2
11/15/2020 7:44	Ida*****	*** ** *432	2
11/15/2020 11:30	bet*****	*** ** *112	3
11/15/2020 20:59	Dan*****	*** ** *335	2
11/16/2020 9:27	Nat*****	*** ** *195	1
11/16/2020 16:18	fsc*****	*** ** *	1
11/16/2020 23:23	Jam*****	*** ** *520	1
11/18/2020 8:47	sne*****	*** ** *544	1
11/18/2020 9:36	ida*****	*** ** *305	3
11/18/2020 12:43	jac*****	*** ** *792	2
11/18/2020 22:16	dec*****	*** ** *111	3
11/19/2020 10:01	Djd*****	*** ** *975	1
11/19/2020 11:13	jig*****	*** ** *	3
11/19/2020 18:13	mjm*****	*** ** *277	1
11/19/2020 20:14	jen*****	*** ** *163	3
11/19/2020 20:22	Shi*****	*** ** *521	2
11/19/2020 20:30	fai*****	*** ** *519	2
11/19/2020 20:32	Kat*****	*** ** *	3
11/19/2020 20:52	kay*****	*** ** *697	2
11/19/2020 21:28	Veg*****	*** ** *311	1
11/19/2020 22:31	ann*****	*** ** *912	1
11/19/2020 23:46	huo*****	*** ** *622	1
11/20/2020 7:57	Lor*****	*** ** *080	1
11/20/2020 12:26	dlke*****	*** ** *404	1
11/20/2020 13:05	Cou*****	*** ** *400	2
11/20/2020 14:59	Tom*****	*** ** *365	2
11/20/2020 16:01	mrs*****	*** ** *050	2
11/20/2020 16:41	a_s*****	*** ** *	1
11/20/2020 23:23	She*****	*** ** *174	4
11/21/2020	dea*****	*** ** *	1
11/21/2020	rmd*****	*** ** *	2
11/21/2020	bla*****	*** ** *	1
11/21/2020 3:52	mja*****	*** ** *470	2
11/21/2020 11:56	Ale*****	*** ** *680	2
11/21/2020 12:57	Jen*****	*** ** *357	3
11/21/2020 17:40	nat*****	*** ** *998	1
11/22/2020 15:57	jen*****	*** ** *535	4
11/22/2020 19:46	lak*****	*** ** *307	4

Table F-1: Online Expressions of Interest Responses (as of 17 March)

Timestamp	Email Address (Redacted):	Telephone (Redacted):	Number of potential students:
11/23/2020 17:51	Agg*****	*** ** *050	3
11/23/2020 17:52	7ru*****	*** ** *186	2
11/24/2020 15:54	jes*****	*** ** *	3
11/24/2020 19:08	cha*****	*** ** *480	3
11/24/2020 19:19	ida*****	*** ** *829	2
11/24/2020 23:28	eon*****	*** ** *019	2
11/25/2020 6:41	gro*****	*** ** *821	2
11/25/2020 10:35	bjw*****	*** ** *	1
11/27/2020 8:56	jac*****	*** ** *	2
11/29/2020 16:31	twj*****	*** ** *501	I'm a teacher—I hope to bring in many :)
11/29/2020 19:49	jlz*****	*** ** *749	2
11/30/2020 11:13	Ash*****	*** ** *673	4
11/30/2020 15:41	Kat*****	*** ** *	4
12/1/2020	mgr*****	*** ** *	3
12/1/2020 10:54	eh*****	*** ** *958	1
12/1/2020 12:46	Dav*****	*** ** *754	2
12/4/2020 15:46	eri*****	*** ** *150	2
12/8/2020 10:43	mom*****	*** ** *676	1
12/8/2020 11:01	mek*****	*** ** *	1
12/8/2020 11:39	ah*****	*** ** *374	1
12/8/2020 12:28	MES*****	*** ** *737	3
12/8/2020 16:50	pte*****	*** ** *	8
12/8/2020 21:32	cha*****	*** ** *443	5
12/8/2020 22:11	Cha*****	*** ** *599	1
12/9/2020 11:00	kee*****	*** ** *524	1
12/9/2020 12:19	sin*****	*** ** *504	1
12/9/2020 12:33	jen*****	*** ** *598	2
12/9/2020 20:47	Cat*****	*** ** *152	3
12/11/2020 11:00	joa*****	*** ** *750	1
12/15/2020 13:43	whi*****	*** ** *301	1
12/19/2020 0:31	hjo*****	*** ** *670	2
12/23/2020 15:30	eus*****	*** ** *266	1
12/24/2020 11:34	jla*****	*** ** *007	3
12/24/2020 14:25	vel*****	*** ** *882	1
1/2/2021 13:55	bea*****	*** ** *590	3
1/2/2021 15:22	Bec*****	*** ** *903	2
1/6/2021 16:57	sam*****	*** ** *020	3
1/7/2021 11:36	Tip*****	*** ** *081	2
1/8/2021 18:54	Mrs*****	*** ** *008	1
1/20/2021 16:33	nan*****	*** ** *867	1
1/20/2021 18:43	Jes*****	*** ** *264	1
1/28/2021 10:55	new*****	*** ** *067	1
1/29/2021 10:20	Aly*****	*** ** *980	1
2/3/2021 8:26	dan*****	*** ** *312	1
2/6/2021 7:40	the*****	*** ** *	1
2/9/2021 20:29	The*****	*** ** *869	2
2/10/2021 8:39	Kre*****	*** ** *	4

Table F-1: Online Expressions of Interest Responses (as of 17 March)

Timestamp	Email Address (Redacted):	Telephone (Redacted):	Number of potential students:
2/12/2021 8:48	nit*****	*** ** *991	1
2/12/2021 9:04	aym*****	*** ** *827	8
2/12/2021 10:36	lmi*****	*** ** *177	2
2/12/2021 10:43	jos*****	*** ** *991	3
2/12/2021 13:35	kev*****	*** ** *547	2
2/12/2021 13:52	lad*****	*** ** *674	2
2/12/2021 14:22	The*****	*** ** *	1
2/12/2021 14:40	Lau*****	*** ** *	4
2/12/2021 15:15	Mac*****	*** ** *321	1
2/12/2021 15:23	lad*****	*** ** *674	2
2/12/2021 15:34	Tif*****	*** ** *551	2
2/12/2021 15:41	Rel*****	*** ** *064	2
2/12/2021 15:46	goo*****	*** ** *182	1
2/12/2021 16:12	Reb*****	*** ** *580	1
2/12/2021 16:13	tom*****	*** ** *510	1
2/12/2021 16:47	jer*****	*** ** *759	5
2/12/2021 18:38	Mor*****	*** ** *565	3
2/13/2021 14:14	Blh*****	*** ** *	2
2/13/2021 14:21	RMB*****	*** ** *375	1
2/14/2021 10:34	mad*****	*** ** *058	1
2/14/2021 13:51	gre*****	*** ** *366	1
2/14/2021 15:44	Joe*****	*** ** *056	1
2/14/2021 17:16	rub*****	*** ** *	3
2/14/2021 21:05	tre*****	*** ** *080	3
2/14/2021 21:39	gre*****	*** ** *363	1
2/14/2021 21:40	lit*****	*** ** *734	1
2/15/2021 11:53	jan*****	*** ** *378	3
2/15/2021 23:35	Ala*****	*** ** *	1
2/16/2021 5:51	huo*****	*** ** *622	2
2/16/2021 9:49	Del*****	*** ** *498	2
2/17/2021 9:29	dga*****	*** ** *416	2
2/17/2021 9:31	amy*****	*** ** *208	3
2/18/2021 17:51	Sun*****	*** ** *121	1
2/18/2021 22:25	juc*****	*** ** *254	3
2/19/2021 21:24	chu*****	*** ** *986	2
2/20/2021 5:48	Jes*****	*** ** *002	1
2/20/2021 6:56	sty*****	*** ** *886	2
2/20/2021 7:47	Kgd*****	*** ** *	4
2/20/2021 7:53	erb*****	*** ** *	2
2/20/2021 7:55	Lac*****	*** ** *388	2
2/20/2021 8:14	Cla*****	*** ** *	2
2/20/2021 8:39	akb*****	*** ** *	2
2/20/2021 8:59	jod*****	*** ** *233	3
2/20/2021 9:13	DeR*****	*** ** *777	2
2/20/2021 10:03	Isl*****	*** ** *174	1
2/20/2021 10:48	Gr8*****	*** ** *725	3
2/20/2021 10:50	Lac*****	*** ** *990	4
2/20/2021 11:16	Mea*****	*** ** *	1

Table F-1: Online Expressions of Interest Responses (as of 17 March)			
Timestamp	Email Address (Redacted):	Telephone (Redacted):	Number of potential students:
2/20/2021 12:56	Vom*****	*** ** *243	3
2/20/2021 1:41:13 PM 2/20/2021 7:10:12 PM	Tie*****	*** ** *255	1
2/20/2021 16:56	aus*****	*** ** *099	1
2/20/2021 21:20	Reb*****	*** ** *386	2
2/20/2021 21:41	kc*****	*** ** *762	1
2/20/2021 23:30	She*****	*** ** *851	2
2/21/2021 6:32	meg*****	*** ** *654	1
2/21/2021 7:07	jos*****	*** ** *991	3
2/21/2021 8:02	Jen*****	*** ** *	2
2/21/2021 10:28	nmu*****	*** ** *457	1
2/21/2021 12:43	fda*****	*** ** *691	2
2/24/2021 9:40:18 AM 2/24/2021 12:39:10 PM	blk*****	*** ** *320	1
2/25/2021 9:22	Les*****	*** ** *753	1
2/25/2021 9:25	dom*****	*** ** *022	2
2/25/2021 11:51	kEd*****	*** ** *451	2
2/26/2021 9:24	Jen*****	*** ** *357	4
2/26/2021 14:19	cha*****	*** ** *685	1
3/1/2021 22:34	jim*****	*** ** *	2
3/2/2021 6:14	dml*****	*** ** *336	3
3/2/2021 7:13	Jen*****	*** ** *336	2
3/2/2021 8:01	lau*****	*** ** *	5
3/2/2021 10:41	Far*****	*** ** *220	2
3/2/2021 12:38	whw*****	*** ** *737	1
3/2/2021 13:06	lov*****	*** ** *	1
3/2/2021 15:28	bok*****	*** ** *291	1
3/4/2021 8:15	Chr*****	*** ** *523	2
3/5/2021 7:28	ada*****	*** ** *	1
3/5/2021 15:05	and*****	*** ** *710	1
3/7/2021 8:30	kar*****	*** ** *720	2
3/7/2021 18:48	Mon*****	*** ** *	2
3/8/2021 11:37	mtn*****	*** ** *163	1
3/8/2021 20:50	eri*****	*** ** *733	4
3/10/2021 15:21	Edga*****	*** ** *416	2
3/12/2021 14:20	she*****	*** ** *777	1
3/13/2021 16:10	liz*****	*** ** *670	2
3/14/2021 7:59	qan*****	*** ** *919	1
3/15/2021 10:37	All*****	*** ** *680	3
3/16/2021 7:35	All*****	*** ** *680	3
3/16/2021 12:53	Kar*****	*** ** *981	2
3/16/2021 14:01	Lau*****	*** ** *715	3
3/16/2021 15:26	Noe*****	*** ** *424	1
3/16/2021 17:16	nla*****	*** ** *001	2
3/16/2021 17:33	eor*****	*** ** *312	1
3/17/2021 6:52	Chi*****	*** ** *076	2
3/17/2021 8:08	Noe*****	*** ** *424	1
3/17/2021 17:32	bro*****	*** ** *707	1

Table F-1: Online Expressions of Interest Responses (as of 17 March)

Timestamp	Email Address (Redacted):	Telephone (Redacted):	Number of potential students:
1/13/2021 5:02:25 PM 2/11/2021 2:03:11 PM	les*****	*** ** *204	1
11/20/2020 10:30:27 PM 2/13/2021 8:42:18 PM	hll*****	*** ** *267	2
11/22/2020 11:18:32 PM 11/23/2020 7:57:24 AM	kre*****	*** ** *629	2
12/2/2020 6:17:19 PM 12/2/2020 10:36:56 PM	Kur*****	*** ** *589	2
12/8/2020 10:18:37 AM 2/12/2021 2:55:15 PM	jpb*****	*** ** *610	2
12/8/2020 11:34:37 AM 2/11/2021 8:16:02 PM	Mun*****	*** ** *600	2
2/12/2021 3:02:57 PM 2/12/2021 8:35:42 PM	eas*****	*** ** *871	2
2/12/2021 4:02:49 PM 2/15/2021 6:46:37 AM	whi*****	*** ** *120	2

F.4 Barney Charter School Initiative (BCSI) Affiliate Status Confirmation

September 11, 2020

Kootenai Classical Academy
Attn: Dr. Edward Kaitz
741 South Fairmont Loop
Coeur d'Alene, ID 83814

Re: Letter of Intent Regarding Kootenai Classical Academy and BCSI

Dear Dr. Edward Kaitz,

This Letter of Intent (the "Letter") summarizes the principal terms and conditions that shall govern the relationship between Hillsdale College and its Barney Charter School Initiative (collectively, "BCSI") and Kootenai Classical Academy ("Institution"), in connection with BCSI's evaluation of Institution's school, for a potential affiliation between the two parties (the "Application Evaluation Process"). Both Institution and BCSI are referenced herein individually, as a "party" and collectively, as the "parties."

In consideration of Institution having submitted an Application to Commence a Relationship with the Barney Charter School Initiative (the "Application") to BCSI and BCSI's review of the Application in connection with the Application Evaluation Process, the parties intending to be legally bound agree as follows:

1. Term. The Term of this Letter shall commence on the date of this Letter (the "Effective Date") and shall continue until the earlier of: (a) twelve (12) months after the Effective Date, or (b) the date on which Institution officially employs a headmaster, principal, or a similar position having responsibility for managing daily operations at the school ("Head of School"); provided however, that upon request by Institution, BCSI shall have the option, in its sole and absolute discretion, to extend the Term of this Letter, in writing, and for such additional periods of time as BCSI deems appropriate (the "Term")

2. Requirements of Institution.

a. Phase I Gateways – By the end of the first six (6) months after the Effective Date or fifteen (15) months prior to the anticipated commencement of the Institution's school's first academic year, whichever comes sooner, and as a condition of receiving BCSI's ongoing support as outlined in Section 3, Institution, including those involved in its founding and creation of the school (the "Group"), shall complete all of the Phase I tasks in Exhibit A to this Letter, which is attached hereto and incorporated herein.

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b. *Phase II Gateways* – By no later than the end of the first twelve (12) months after the Effective Date or twelve (12) months prior to the anticipated commencement of the Institution's school's first academic year, whichever comes sooner, and as a condition of receiving BCSI's consideration for acceptance into BCSI's certification program, Institution and Group, as applicable shall complete all the Phase II tasks in Exhibit A to this Letter.

c. *Cooperation with BCSI* – In connection with the Application Evaluation Process and during the Term of this Letter, Institution shall make the appropriate persons available, upon request by BCSI, to address any questions, participate in any interviews, and to meet during any BCSI site visits to Institution's site for the school, as may be reasonably requested by BCSI representatives. Institution acknowledges and agrees that all information and statements provided to BCSI in accordance with this Letter shall be current, complete, and accurate and that Institution will promptly inform BCSI of any material changes to any information provided or statements as part of the Application Evaluation Process.

d. *Diligence Concerning Authorizer Requests* – During the Term of this Letter, Institution shall act diligently to ensure timely responses to questions and requests for information from the applicable state authorizer for the school to ensure the best chance towards the school opening under the time frames contemplated under this Letter.

e. *BCSI's Right to Delay and Require a Remediation Plan* – Under circumstances where, in BCSI's sole discretion, Institution is not reasonably accomplishing the tasks within the time limits set forth in Sections 2(a) or (b), BCSI shall have the option to (i) recommend that Institution delay their opening and operation of the school for an additional year, or (ii) require Institution to create and submit a remediation plan to BCSI regarding how Institution proposes to accomplish the delinquent tasks. Where the Institution agrees to delay the opening, the terms and conditions of any subsequent agreement or renewal regarding the terms of support will be addressed by a separate document or letter of understanding. In the event that Institution repeatedly fails to accomplish the tasks within the time limits set forth in Sections 2(a) or 2(b), or a remediation plan, BCSI shall have the right to call Institution in material breach and to terminate this Letter without any additional obligation to Institution and School.

3. *BCSI's Support Services*. During the Term of this Letter, BCSI shall provide Institution with the following assistance services as it relates to the school (collectively, the "Services"):

a. *Access to Licensed Training Materials* – BCSI shall provide Institution with a limited License, as set forth in Section 5 of this Letter, for temporary access to certain materials and curricula for classical charter school education grades K-12, including, without limitation, a Scope and sequence guide, exemplar materials, a program guide for each grade of K-12 and associated bill of materials, and other materials which BCSI, at its sole discretion, may provide (collectively, the "Licensed Training Materials") for use at the school especially in its initial start-up efforts and charter authorization application, if applicable. For the avoidance of doubt, the Licensed Training Materials under this Letter does not include access to or copies of any auxiliary materials or resources and other copyrighted material or trade secrets that might be referenced in or that may accompany either the program guide or bill of materials otherwise

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reserved for fully licensed users under the terms and conditions of a separate Curriculum Support Agreement.

b. *Information and Guidance Concerning Certain School Documents* – BCSI shall provide Institution with assistance, including information and guidance, concerning the creation of Institution's bylaws, completing and filing IRS Form 1023 to obtain 501(c)(3) status for school, and in connection with Institution's application to the applicable state authorizer for the school.

c. *Vetting Head of School Candidates* – BCSI shall provide its assistance to Institution as part of the hiring process for the Head of School, which shall include interviewing candidates being considered for hire by Institution and providing the school's governing board (if different from Institution) with a recommendation regarding the hire of the position. Institution's decision on a Head of School has a direct impact on BCSI's future relationship and affiliation with Institution and the school.

d. INSTITUTION ACKNOWLEDGES AND AGREES THAT THE LICENSED TRAINING MATERIALS AND SERVICES PROVIDED HEREUNDER ARE PROVIDED "AS IS", WITH NO REPRESENTATION OR WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS OR ANY IMPLIED WARRANTY ARISING FROM STATUTE, COURSE OF DEALING, COURSE OF PERFORMANCE, OR USAGE OF TRADE. BCSI HAS DUTY TO INDEMNIFY INSTITUTION AND/OR SCHOOL HEREUNDER.

4. *Publicity*. For the duration of this Agreement, Institution may represent to third parties, in connection with the completion of the Institution's charter for the school and in communications with the applicable state authorizer, that Institution has executed a Letter of Intent to explore an affiliation with Hillsdale College's Barney Charter School Initiative. Institution shall not have any other right to use the names or logos of Hillsdale College or BCSI. Upon expiration or termination of this Letter, Institution's rights under this Section 4 shall also immediately terminate and Institution shall not use BCSI or Hillsdale College's name in any manner, except as may be mutually agreed upon by the parties in writing.

5. *License to Access Licensed Works; Ownership*. Subject to the terms and conditions of this Letter, BCSI hereby grants to Institution for limited use at the one school contemplated herein, a non-exclusive, nontransferable, revocable license and right to use, access, and reproduce the Licensed Training Materials on the approved mediums for strictly educational and non-commercial purposes and strictly within the Institution contemplated by this Letter for the purposes of its completion of the Application Evaluation Process. The Licensed Training Materials and all related content created, purchased or otherwise belonging to or provided by BCSI are the sole and exclusive property of BCSI, and are protected by this Letter, as well as various state, federal and foreign intellectual property rights, including copyright laws and international copyright treaties and trademark laws. Institution may not download, transmit, copy, store, publish or distribute the Licensed Training Materials in any form or by any means,

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to any other entity, organization or school. By agreeing to the terms and conditions of this Letter, Institution shall not become the owner of the Licensed Training Materials but is entitled to use the Licensed Training Materials for educational and non-commercial means as specifically permitted according to the terms of this Letter. Institution may not alter or attempt to alter or modify any part of the Licensed Training Materials or the information contained therein. Institution agrees that they may not remove any BCSI credit or attribution, including attribution to any BCSI or other authors. Institution may not provide supplemental materials to the Licensed Training Materials without language making clear that such material is not part of the original Licensed Training Materials supplied by BCSI.

6. Confidentiality.

a. *Licensed Training Materials* – Institution acknowledges that the Licensed Training Materials and their contents are confidential and proprietary to BCSI, that the information contained therein is of significant value, and that its unlawful copying and/or disclosure to others may cause irreparable harm to BCSI. BCSI designates and protects its Licensed Training Materials, curricula and other trade secrets as confidential and proprietary. Institution shall not disseminate these confidential and proprietary materials to any individual or entity without the express written permission of BCSI. BCSI has and will continue to take appropriate measures and actions to prevent these confidential and proprietary materials from becoming available to persons other than those approved by BCSI to have access to such materials. Except as specifically provided herein, Institution hereby agrees and covenants that, during and after the Term, Institution will maintain confidentiality of such materials and will not, directly or indirectly, in one or a series of transactions, disclose to any individual, sole proprietorship, partnership, corporation, limited liability company, unincorporated society, trust or other entity (each a "Person") outside of Institution organization for the school, or use or otherwise exploit the Licensed Training Materials for Institution's own benefit or for the benefit of any Person other than members of Institution's organization for the school.

b. *Letter and Other BCSI Confidential Information* – During the Term of this Letter, Institution acknowledges that BCSI may disclose or otherwise provide Institution with access to confidential information, including, without limitation, (i) the terms and conditions of this Letter, any exhibits or attachments thereto, (ii) any document BCSI marks as "Confidential" at the time of disclosure whether orally or in writing, (iii) BCSI certification criteria, and (iii) any other nonpublic, sensitive information that BCSI discloses to Institution (each and collectively, "Confidential Information"). Confidential Information shall not include information that (i) is in Institution's possession at the time of disclosure, (ii) is independently developed by Institution without use of or reference to Confidential Information, (iii) becomes known publicly, before or after disclosure, other than as a result of an act, omission or breach by Institution, or (iv) is approved in writing by BCSI for Institution to disclose. For the avoidance of doubt, Institution may disclose the terms and conditions of this Letter to its state authorizer without being in violation of this confidentiality provision. In each case in which Institution argues that one of the foregoing exceptions to Confidential Information applies, Institution shall have the burden of proof to establish such exception. For the duration of this Letter, Institution shall not disclose any Confidential Information to any board member, Group member, employee, agent, or representative of Institution or the school unless such person has a need to know such

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information in connection with a party's obligation under this Letter and it advises the party that such information is confidential, and Institution shall not disclose any Confidential Information to any other party without BCSI's prior written consent. Institution shall protect Confidential Information utilizing the same degree of care it uses to protect its own information of a confidential nature, but no less than a reasonable amount of care. Institution shall immediately notify BCSI in the event of any misuse or misappropriation of Confidential Information. Notwithstanding the foregoing, Institution may disclose Confidential Information as required by law, provided however, to the extent not prohibited by applicable law, it shall provide BCSI with prompt notice of the legal demand for disclosure and cooperate with BCSI in any effort by BCSI to obtain a protective order or to otherwise contest such disclosure, at BCSI's expense. At the conclusion of this Letter, Institution shall return or destroy, at BCSI's option, all Confidential Information and the Licensed Training Materials, and provide certification of the same.

7. Governing Law. This Letter shall be governed by and construed in accordance with the laws of the State of Michigan, without giving effect to any choice or conflict of law provision or rule.

8. Miscellaneous. This Letter may be executed in counterparts, each of which shall be deemed to be an original, but all of which shall constitute one agreement. The headings of the various sections of the Letter have been inserted for reference only and shall not be deemed to be part of this Letter.

9. No Additional Obligations. Each party hereto acknowledges that it is a separate entity and that nothing contained in this Letter shall be deemed to create a joint venture, partnership or any other relationship or require any party to enter into a subsequent transaction.

10. Assignment. The parties may not assign or transfer their obligations under this Letter.

11. Severability. If any provision of this Letter is found to be unenforceable, the remainder shall be enforced as fully as possible and the unenforceable provision shall be modified to the limited extent required to permit its enforcement in a manner most closely approximating the intention of the parties as expressed herein.

IN WITNESS WHEREOF, the parties hereto accept and agree to be legally bound by the terms and conditions set forth above and have caused their respective duly authorized representatives to execute this Letter as of the Effective Date.

Kootenai Classical Academy

~~BARNEY CHARTER SCHOOL INITIATIVE~~

Barney Charter School Foundation

~~KOOTENAI CLASSICAL ACADEMY~~

By: *Edward Kartz*

By: *Richard P. Pewe Jr.*

Print Name: Edward Kartz

Print Name: Richard P. Pewe Jr.

Title: Board Chair, KCA

Title: VPICAO

**Exhibit A
Timeline for Phases and Gateways**

The Phase I tasks listed below include some tasks which Institution is expected to have already completed prior to the Effective Date. To the extent this is not the case, an Institution is expected to work more efficiently and diligently during Phase I to catch-up with other schools under consideration by BCSI for acceptance into the certification program.

Phase	Task	Date of Completion
Phase I	Establish and hold regular Group meetings during each month of this Agreement to address matters related to the school, including the creation of temporary committees and the assignment of responsibilities.	Ongoing
Phase I	Complete a draft of the bylaws for the school, which shall reflect consideration of the BCSI model	
Phase I	Complete and file IRS Form 1023 to establish federal nonprofit status as a 501(c)(3)	
Phase I	As part of its charter application, prepare an education plan, which shall include: <ul style="list-style-type: none"> • a research base for curriculum and performance of similar schools, • a basic explanation of curriculum and instruction, • elementary and middle school schedules, • high school course plan and graduation requirements, • measurable goals and testing, • support for special student populations, and • any necessary curricular alignment documents; 	
Phase I	Prepare the job description for the Head of School	
Phase I	Establish an executive-search process for Head of School, which shall include BCSI in the review process of candidates.	
Phase I	Identify, vet, compare, and engage any management or service providers	

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	who will be named in the charter application	
Phase I	Submit fully-completed authorizer application to BCSI at least 30 days before due date to authorizer.	
Phase I	Write and approve a transition plan from now through opening, including identifying any new board members	
Phase I	Determine and approve school opening size and a growth plan for the school	
Phase I	Identify at least one viable school site in the school's geographic area, including expected development costs, timeline, and contractors (facility costs should not exceed 18% of anticipated revenue);	
Phase I	Develop a basic finance plan to cover year-zero, startup, and building/remodeling costs for the school	
Phase I	Identify, vet, compare, and engage charter school legal counsel	
Phase I	Develop a budget, which at a minimum should include year-zero through operational year three finances and should include two enrollment scenarios (e.g. 90% and 75% of full-enrollment)	
Phase I	Develop a fundraising plan based on the finance plan and budget	
Phase I	Create the school name, mission statement, and school virtues	
Phase I	Submit fully-completed authorizer application to authorizer.	
Phase I	As possible, meet with authorizer representatives, relevant political officials, and/or members of the local school board to build support for the school's application;	
Phase I	Start to build a network of support and interest through community events and social networks	
Phase I	Create a school logo and a basic brochure for the school;	
Phase I	Establish a system for building an	

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	interest list, including emails	
Phase I	Adapt public relations roadmap into a specific plan for school	
Phase I	Assign public relations and marketing responsibilities;	
Phase I	Create and manage a Facebook page (which can be private at this juncture);	
Phase I	Create a newsletter template.	
Phase I	Purchase an online domain name for the school and start working on a brochure website;	
Phase I	Determine lottery and enrollment process specifics, including any enrollment preferences, which should include, where possible, a preference for transfers from other BCSD-selected schools	
Phase I	Begin work on board policies, including a conflict of interest policy	
Phase I/II, as necessary for charter application	Prepare a first draft of the Student/Family Handbook	
Phase I/II, as necessary for charter application	Prepare a first draft of the Staff/Faculty Handbook	
Phase	Task	Date of Completion
Phase II	Respond to any questions or feedback from authorizer	
Phase II	Prepare for the capacity interview with the school's authorizer, which shall include expecting questions about all of the following: <ul style="list-style-type: none"> • management and/or school leadership, • performance of similar schools and research base for school's academic program, • support for student sub-populations, • support for students with special needs, disabilities, and language barriers, • business plan and budget, and • facilities and financing 	
Phase II	Continue to build the school's network of support and interest through social medial networks, community events, and begin to	

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	develop a potential enrollment list.	
Phase II	Develop additional informational brochures and related materials about the school;	
Phase II	Begin executive search process for the Head of School	Head of school already secured.
Phase II	Send Head of School Candidates to BCSI for review	
Phase II	Identify other viable school sites, compare these sites to the original site as it relates to size, cost, growth, amenities, and financing options	
Phase II	Identify, vet and compare available financing options (as necessary)	
Phase II	Prepare grant applications (as appropriate)	
Phase II	Meet necessary fundraising goals to begin funding year-zero (the first year immediately prior to the First Year of Operations).	
Phase II	Hire Head of School	Head of school already secured.

F.5 Board Training

(BLUUM, Hillsdale BCSI, CharterStart Workshop, Treasure Valley Charter Academy Site Visit)

KCA board members have taken numerous opportunities to cultivate their understanding of their roles, responsibilities and obligations as directors of an important, state sanctioned, charter school enterprise in Idaho. In particular, members of the board have individually or collectively attended the following, formal training:

- Our board chair attended the state of Idaho's Charter Start Workshop in the summer of 2019, ~~and five more of our board members attended the Charter Start Workshop that was offered in February of 2021;~~
- Five of our board members took the opportunity to visit Treasure Valley Classical Academy in Fruitland, Idaho, in February of 2020, while school was in session;
- Seven of our board members attended a two day BLUUM board training workshop that was offered in Coeur d'Alene in October, 2020;
- Five board members attended the Charter Start Workshop offered in February of 2021
- Seven board members attended Hillsdale College's three day board training session in Hillsdale, Michigan in April, 2021. ~~requires a majority of a BCSI founding board to visit a currently operational BCSI school as part of our requirement to attain affiliate status with Hillsdale. In addition, the entire KCA board attended a two day BLUUM board training workshop that was offered in Coeur d'Alene in October, 2020. Five of our board members will also be flying to Michigan in April to attend a three day board training session that is offered annually by Hillsdale College to all BCSI founding board members across the country.~~

F.6 Potential Back Office Support



Project Title: Back-Office In-Kind Grant Support

Grantee: Kootenai Classical Academy

Contact Person(s): Terrence Moore
terrence.o.moore@gmail.com

Grant Period: July 1, 2021 to June 30, 2022 (year zero but based on performance and availability of funds likely to be renewed for future years)

Total Award: \$30,000 in-kind

Specifications of the Grant Award:

1. **Project Description:** To support its “20 in 10” grantee schools, Bluum is committed to providing high-quality back-office support for eligible grantees who want the service.
2. **Project Objectives.** Make quality back-office financial support, free of charge, available to Bluum grantees.
 - Ensure timely and accurate reporting of all financial activity as required by federal and state agencies.
 - Ensure timely and accurate reporting of all financial activity as required by nonprofit grantmaking organizations.
 - Empower school leadership and board members in their financial and operational decision-making.
3. **Services Provided and Estimated Value.** For the current grant period, Bluum will provide budgeting, accounting and strategic finance support, with an estimated value of \$30,000. Future grant awards will be based on performance and availability of funds. If renewed for the first year of operation, Appendix “A” shows the typical services to be offered and the estimated value of these services.
4. **Participation Requirements:** Bluum will provide oversight and evaluation for this grant. To enable Bluum to provide the Services, the Grantee shall: (a) provide financial information to Bluum as requested; (b) participate in associated Bluum training and research; and (c) provide Bluum access to its records, data, and other information needed by Bluum to perform the Services. Bluum will maintain all Grantee records, data and information in a confidential manner and will comply with all rules of confidentiality as required by State and Federal law and school policy, including but not limited to FERPA, HIPPA, et al.

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- 5. Retention of Key Personnel.** Bluum recognizes that the participation of “Contact Person(s)” listed above is critical to the success of the Grantee. If the key personnel noted above ceases to be directly involved in this project, Grantee must immediately notify Bluum CFO Marc Carignan. Upon such notification, Bluum will hold the in-kind grant support, subject to notification of replacement of the personnel. At such time Bluum will make a written determination as to the feasibility of continuing the grant agreement.
- 6. Fiscal Accountability.** This in-kind support has been awarded by Bluum based on the cost of services, equal to the Total Award listed above. All grant support must be utilized for charitable or educational purposes.
- 6.1 Expenditure Prohibitions.** Grantee shall not use any of the support received from Bluum:
- To carry on propaganda, or otherwise to attempt, to influence legislation (within the meaning of Internal Revenue Code (“IRC”) Section 4945(d)(1);
 - To influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive (within the meaning of IRC Section 4945(d)(2);
 - To make any grant to an individual or other organization that does not comply with the requirements of IRC Section 4945(d)(3) or (4); or
 - To undertake any activity for a non-charitable purpose, as defined in IRC Section 170(c)(2)(B);
 - To provide material support or resources to any individual or entity that Grantee knows, or has reason to know, is an individual or entity that advocates, plans, sponsors, engages in, or has engaged in terrorist activity;
 - To pay administrative indirect costs that are not directly related to the Services as defined in this Agreement.
- 7. Further Assurances.** Grantee shall take all such actions reasonably requested by Bluum, and shall comply with the provisions of any future regulations promulgated under IRC Sections 4942 to 4945 that are applicable to the grant, to ensure that the grant (a) will constitute a “qualifying distribution” by Bluum within the meaning of IRC Section 4942(g), (b) will not constitute a “taxable expenditure” by Bluum within the meaning of IRC Section 4945, and (c) will not violate the USA PATRIOT Act, Executive Order 13224, or any other applicable law, regulation, or order.
- 8. Indemnification.** Grantee acknowledges that Bluum is providing the Services for no compensation for the sole benefit of Grantee, and that Bluum has no control over the operations, acts or omissions of Grantee. As such, Grantee shall indemnify, defend and hold Bluum, its directors, affiliates, subsidiaries, employees and representatives harmless from and against any claims, liabilities, losses, damages, fines, penalties, and expenses (including but not limited to reasonable legal fees and costs) (collectively, “Losses”) incurred by Bluum arising out of this grant, the Services, Grantee’s operations, or any violation by Grantee of the grant requirements outlined herein, except to the extent such Losses are caused solely by the willful misconduct of Bluum, Bluum agrees to indemnify, defend and hold the Grantee, its affiliates, subsidiaries, assignees, and licensees harmless from and against any Losses resulting from any injury to person or property caused by willful misconduct on the part of Bluum at the Grantee’s school premises. Except for the foregoing indemnification obligation, Grantee hereby releases Bluum from any and all claims and Losses arising out of this grant and the Services.

9. **Insurance.** Bluum and Grantee shall each procure and maintain appropriate industry-standard insurance, including insurance to cover the indemnification obligations set forth herein, including at a minimum the insurance set forth below. Bluum and Grantee shall cause the other to be listed as an additional insured on any applicable liability insurance policy. All such policies of insurance shall include coverage for contractual liability and a standard waiver of subrogation provision.



Workers Compensation	Statutory
Employer's Liability	
• Each Accident	\$100,000
• Disease, policy limit	\$500,000
• Disease, each employee	\$100,000
General Liability	
• Each occurrence (Bodily injury & property damage)	\$1,000,000
• General Aggregate	\$2,000,000
Automobile Liability (Combined single limit – Bodily injury & property damage)	
• Each Accident	\$1,000,000
Professional Liability Insurance	\$1,000,000
• Each claim made	\$1,000,000
• Annual aggregate	\$1,000,000
Errors & Omissions	\$1,000,000

10. **Reporting Requirements.** Grantee shall submit their audited financial statements to Bluum, attested by a Certified Public Accountant, within 30 days of receipt/issuance.

11. **Termination of Grant.** Bluum reserves the right to rescind any granted Services at any time. Except in the circumstance where Bluum loses its funding for the Services, Bluum will endeavor to provide Grantee with sixty (60) days' notice prior to termination.

12. **Definitions.** All references to "IRC" are to the Internal Revenue Code of 1986, as amended, and shall be deemed to include the corresponding provisions of any future federal tax laws and regulations that are applicable to the grant. References to the USA PATRIOT Act are to Public Law No. 107-56.

The signatures of Grantee indicate acceptance by Grantee of the terms and conditions of this grant and confirm Grantee's commitment to the project objectives and expected results outlined above. The signatures of Grantee also confirms that Grantee is (a) a tax-exempt organization under IRC Section 501(c)(3) that is not a private foundation by virtue of being described in IRC Section 509(a)(1) or (2) or (b) a governmental unit described in IRC Section 170(c)(1).

Name	Signature	Date
Terry Ryan, CEO Bluum		4/28/2021
Marc Carignan, CFO Bluum		4/28/2021
Terrence Moore, Principal Kootenai Classical Academy, Inc.		

Appendix A: Services Granted and Estimated Value

Back Office Services	Monthly Fee	Annual Fee																								
<i>Human resources</i>																										
Maintain employee files throughout the year, including education credentials, fingerprinting, perform background checks through the SDE, benefits documentation, contracts, demographic data, work assignments, timesheets, tax elections, I-9, direct deposit election, and contract.	\$	5,450																								
<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th style="text-align: center;"># of EE's</th> <th style="text-align: center;">Annual Fee</th> <th style="text-align: center;">Subtotal</th> </tr> </thead> <tbody> <tr> <td>Per New Certificated Employee</td> <td style="text-align: center;">24</td> <td style="text-align: right;">\$ 200</td> <td style="text-align: right;">\$ 4,800</td> </tr> <tr> <td>Per Existing Certificated Employee</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 75</td> <td style="text-align: right;">\$ -</td> </tr> <tr> <td>Per new classified employee</td> <td style="text-align: center;">13</td> <td style="text-align: right;">\$ 50</td> <td style="text-align: right;">\$ 650</td> </tr> <tr> <td>Per existing classified employee</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ -</td> <td style="text-align: right;">\$ -</td> </tr> <tr> <td></td> <td style="text-align: center;">37</td> <td></td> <td style="text-align: right;">\$ 5,450</td> </tr> </tbody> </table>				# of EE's	Annual Fee	Subtotal	Per New Certificated Employee	24	\$ 200	\$ 4,800	Per Existing Certificated Employee	-	\$ 75	\$ -	Per new classified employee	13	\$ 50	\$ 650	Per existing classified employee	-	\$ -	\$ -		37		\$ 5,450
	# of EE's	Annual Fee	Subtotal																							
Per New Certificated Employee	24	\$ 200	\$ 4,800																							
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Per new classified employee	13	\$ 50	\$ 650																							
Per existing classified employee	-	\$ -	\$ -																							
	37		\$ 5,450																							
Initiate and manage benefit renewals through insurance broker, all data updates, and reconciling benefits invoices are considered part of accounting services fees below																										
<i>Payroll</i>																										
Monthly payroll processing, including:	\$	1,000																								
Tax payment and quarterly/annual reporting including W-2, W-3, 1099, 1096, Idaho income tax		\$ 12,000																								
Quarterly ID unemployment reporting																										
PERSI reporting and payment																										
Sick-time tracking																										
Monthly payroll transactions report ready to post to school website (we can post if provided credentials)																										
<table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th># of EE's</th> <th>Check Box</th> <th>Monthly Fee</th> <th></th> </tr> </thead> <tbody> <tr> <td>0 - 25</td> <td></td> <td style="text-align: right;">\$ 750</td> <td></td> </tr> <tr> <td>25 - 50</td> <td style="text-align: center;">x</td> <td style="text-align: right;">\$ 1,000</td> <td style="text-align: right;">\$ 1,000</td> </tr> <tr> <td>50 - 100</td> <td></td> <td style="text-align: right;">\$ 1,250</td> <td></td> </tr> <tr> <td>100 +</td> <td></td> <td style="text-align: right;">\$ 1,500</td> <td></td> </tr> </tbody> </table>			# of EE's	Check Box	Monthly Fee		0 - 25		\$ 750		25 - 50	x	\$ 1,000	\$ 1,000	50 - 100		\$ 1,250		100 +		\$ 1,500					
# of EE's	Check Box	Monthly Fee																								
0 - 25		\$ 750																								
25 - 50	x	\$ 1,000	\$ 1,000																							
50 - 100		\$ 1,250																								
100 +		\$ 1,500																								
<i>Revenues, Expenditures, Federal Title I, II, III, IV, and Federal IDEA</i>																										
Revenue processing tasks consisting of:	\$	1,500																								
Process cash and check transactions, prepare deposits (to be deposited by school staff)		\$ 18,000																								
Record transactions to correct G/L codes																										
Provide donation acknowledgements for monetary donations																										
Report sales tax for taxable sales																										
Review and reconcile electronic payments from state department of education																										
Prepare all adjusted journal entries when applicable																										
Federal programs- recognition of revenue and accompanying receivable when expenditure is recorded																										
Federal programs - complete monthly posting of funds draw-down using Idaho SDE's CSFGA web site																										
Expenditure processing tasks consisting of:																										
Electronic storage of all backup to expenditures																										
Place orders, issue purchase orders when required																										
Process checks semi-monthly																										
Track capital expenditures for auditor / SDE																										
Loans / Bonds - accurate posting of P&I, monitoring against amortization schedule																										
Loans / Bonds - Compute covenant compliance quarterly, include in board reports																										
Federal Funds - draw downs to be processed																										
Complete compliance review of each expenditure, feedback for questionable expenditures																										
Post expenditures to correct G/L																										
Electronically maintain all expenditure backup and approvals																										
High-dollar procurement:																										
For expenditures exceeding \$25,000, issue, receive, and catalog bids; provide for Business Manager/Administration review	Per project, hourly fee, \$50/hr rate																									
<i>Accounting</i>																										
Monthly Financial Statements	\$	300																								
Standard 2M Reports ("Budget Report")		\$ 3,600																								
Detail report by G/L code																										
Initiate and manage benefit renewals through insurance broker, all data updates, and reconciling benefits invoices																										
Monthly A/P transaction report posted to school website																										
Financial Audit Support - Prepare all CPA firm-requested items and follow-ups		\$ 4,000																								
Monthly bank reconciliations	\$	150																								
Assist with annual budget preparation		\$ 1,700																								
<i>Compliance Reporting</i>																										
Prepare all requested financial reports (see table, next tab / attachment A) and submit to Finance Manager for review and submission, or submit directly with Finance Manager approval	\$	500																								
		\$ 6,000																								
Grand total - Annual Cost, based on 12-month contract:	\$	52,550																								

F.7 BLUUM Letter of Support



May 1, 2021

To: Idaho Public Charter School Commission

Chairman Alan Reed
Vice-Chair Brian Scigliano
Sherrilynn Bair
Julie VanOrden
Wanda Quinn
Kathleen "Kitty" Kunz
Nils Peterson

Re: Support for Kootenai Classical Academy

Dear Chairman Reed and members of the Idaho Public Charter School Commission,

I am writing in support of the charter school petition for the Kootenai Classical Academy – a Barney Charter School Initiative (BCSI) partner. My name is Terry Ryan and I am CEO of Bluum. Bluum is organized to seek out, vet and support innovative leaders and high-performing school models. Since 2015 Bluum, with support from the J.A. and Kathryn Albertson Family Foundation, has invested \$2,240,000 in new school fellows.

Terrence Moore and Kootenai Classical Academy are exactly the type of individual and school model that we want to support and help grow in the Post Falls area of Idaho. Further, the success of the BCSI-affiliated Treasure Valley Classical Academy in Fruitland demonstrates the demand for this sort of classical education across Idaho.

It is my pleasure to write this letter of support for the Dr. Moore and the Kootenai Classical Academy board of trustees. Dr. Terrence Moore is one of the most accomplished K-12 school leaders Bluum has ever had the privilege to fund and support as an Idaho New School Fellow. Dr. Moore is a Marine Corp veteran who has taught History at Ashland University and Hillsdale College.

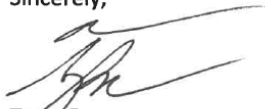
He left higher education in the early 2000s to start a private classical K-12 school (Ridgeview Classical Schools in Colorado). He felt he could make a bigger difference working with younger students. Dr. Moore was one of BCSI's early school leaders and launched the Atlanta Classical Academy in 2014. He mentored Stephen Lambert who is leading the highly successful Treasure Valley Classical Academy.

For more than two years Bluum has also worked closely with the Board of Kootenai Classical Academy including providing board training to the groups in April of 2020. The group is led by the husband and wife duo of Ed and Rachel Katz. Ed is a college professor and Rachel is a

community leader. They are joined by other local business and community leaders who are committed to the vision of a classical education. As of the writing of this letter the Kootenai Classical Academy has received letters of interest from families for 500+ interested students. This number has been growing about 100 students per month.

Bluum is committed to supporting the work of the Kootenai Classical Academy and will do all we can to aid their efforts including working to provide grant support as we have 30 public charter schools across Idaho since 2015. I encourage the Idaho Public Charter School Commission to support this effort. We have and will continue to do so into the future.

Sincerely,



Terry Ryan
Chief Executive Officer

F.8 Request for Funding



KOOTENAI
CLASSICAL ACADEMY
an American Classical Education

Letter of Intent

April 28, 2021

Dru Damico
Building Hope
910 17th Street NW, Suite 1100
Washington, DC 20006

Dear Dru,

We here at Kootenai Classical Academy in Post Falls, Idaho, continue to be grateful for the many professionals that are helping us to build the first BCSI charter school in Northern Idaho. The work that Building Hope does in our state has been critical to the successful start-up and operation of quality public charter schools.

Per your request, this Letter of Intent seeks to outline the financing needs of Kootenai Classical Academy as we work towards starting the construction of our new building in the coming months. Thank you for this opportunity to ask for help from your organization. Please let us know at your earliest convenience if these needs can be accommodated through the programs of Building Hope. Again, please accept our sincere appreciation for the important work you do.

NEED #1	\$300,000 - \$1,000,000
Date needed	July 1, 2021
Building Hope Ask	Provide short term loan to take down the property ahead of a October/November 2021 closing on permanent financing. BH to hold title or have 1st lien position. Reimbursed at finance closing.
Description	KCA has identified several sites in the Post Falls area of between 7 and 12 acres that would accommodate an eventual K12 school with just over 700 students. This area of Coeur d'Alene is one of the fastest growing areas in the countries. Properties are scarce and move quickly on and off the market.

NEED #2	Up to \$500,000, approximately
Date needed	July through November 2021
Building Hope Ask	Provide short term loan to cover pre-construction costs including architect, civil, geo, traffic, permit fees, etc. BH to have 1st lien position on property. Reimbursed at finance closing.
Description	KCA is working to delay any possible pre-construction costs until permanent financing is secured.



Letter of Intent

NEED #3	Use of JKAF PRI to fund building construction 65% - RoundTable - tax exempt revenue bond or equivalent 35% - Building Hope - PRI through JKAF (Not to exceed \$3.5 Million)
Date needed	October/November 2021
Building Hope Ask	35% loan @3% through JKAF PRI due in 5years, amortized for 30-35 years, subordinate position to the remaining 65%. Discuss with RoundTable different structuring options to provide more liquidity for BH/JKAF.
Description	Anticipated roles to include: <ul style="list-style-type: none"> ➤ Building Hope - Subordinate Loan through JKAF ➤ RoundTable - Financial Advisor and project oversight ➤ Bouma USA - Contractor and Design ➤ Paradigm - Owners Rep

Thank you for your serious consideration. We hope to be able to settle on these issues as soon as possible so that we can move forward on the project quickly. We appreciate your help!

Sincerely,

Dr. Edward Kaitz, Board Chair
Kootenai Classical Academy

F.9 Kootenai County Demographic, Real Estate, and Market Data

Why Is Coeur d'Alene America's Hottest Housing Market?

(https://www.wsj.com/articles/why-is-coeur-dalene-americas-hottest-housing-market-11619644273?st=m8858kicrfjkqv6&reflink=article_email_share)

Americans Are Flocking to Idaho, Fleeing New Jersey

(<https://www.usnews.com/news/best-states/articles/2020-01-02/americans-are-flocking-to-idaho-fleeing-new-jersey>)

Idaho 2nd fastest-growing state in latest census

(https://www.idahostatejournal.com/news/local/idaho-2nd-fastest-growing-state-in-latest-census/article_393f0aa4-c0c1-5c91-8426-91ca47f08bd4.html?utm_medium=social&utm_source=email&utm_campaign=user-share)

VI. CONSIDERATION OF IMPACT OF FY21 ASSESSMENT

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33.5209A

I.C 33-5209B

BACKGROUND

Seven (7) IPCSC schools currently have academic conditions due on 6/30/21. The IPCSC may consider revocation for any school that fails to meet the terms of a condition expressly written into the school's performance certificate upon renewal.

Additionally, twelve (12) IPCSC schools will be considered for renewal in March of 2022. The IPCSC must ground its decisions on the outcomes reported in each school's annual performance report. Performance reports are based on the academic, operational, and financial frameworks.

At the IPCSC's April 8th meeting, materials included a letter from the U.S. Department of Education stating that spring statewide assessments should be given but should not be used to make high-stakes decisions. Materials also included a draft of the Idaho SDE's waiver requesting permission to not assign high-stakes accountability designations (i.e., "identified for targeted support", etc.) based on spring of 2021 assessment data.

DISCUSSION

Due to the impact of the pandemic, it is generally understood that spring of 2021 assessment data will be useful in re-establishing baseline data. Several variables, including irregular attendance, student mobility, and quickly shifting instructional methods, are likely to impact assessment data this year. It is also true that all IPCSC charter schools were engaged in instruction within three (3) weeks of the initial March 2020 closures and that several have been engaged in full-time face-to-face learning throughout the 2020-2021 school year.

The IPCSC must consider how to address its statutory obligations to hold schools accountable to established academic standards in a case where the evaluative data may not be a true reflection of the school's academic performance.

Additionally, the IPCSC must consider how to address the financial impacts of the pandemic. Several schools experienced drops in enrollment that required creative operational solutions and quick budget amendments. In April, due to legislative action, schools were officially informed that their final state revenue distributions (issued on May 15th) would be decreased with the intent that federal dollars arriving this spring would serve to make schools financially whole. However, a portion of the federal monies will not become available until after July 1st.

The decrease of funding will be reflected in FY21 financial audit reports, but the correlating influx of funding will be reflected in FY22 financial audit reports. The IPCSC's annual performance reports use the FY21 audit as primary data source.

It is likely that some schools (particularly those without a significant reserve) will not meet standard on all financial measures of the performance framework due entirely to the timing of fund availability and end-of-year audits. As this result will not be due to poor financial management on the part of the school, the IPCSC must consider how to address its statutory obligations to hold schools accountable to established financial standards in these circumstances.

No operational measures appear to be directly impacted by the pandemic, and so no changes need to be considered for the operational section of the performance framework.

The IPCSC must consider the pandemic impact for the seven (7) schools with academic conditions due on 6/30/21;

The IPCSC must consider the pandemic impact for the twelve (12) schools up for renewal based on the performance outcomes reflected in the FY21 annual performance report; and

The IPCSC must consider the pandemic impact on the FY21 annual performance report for all schools which will be based on FY21 data and published in December of 2021.

SPEAKER

PCSC Director, Jenn Thompson

IMPACT

1. If the IPCSC chooses not to consider revocation due to failure to meet an academic renewal condition, the school's performance outcome will still be reported in a "condition status report" as part of the school's annual report, but regardless of the score, the school will not be in danger of closure mid-term.

Alternatively the IPCSC could choose to waive the conditions, which would result in no further reporting on condition status. Schools would only receive the regular annual reports.

2. If the IPCSC chooses to not consider non-renewal based on academic and financial ratings, each school's annual report will reflect both the performance outcome and the rating earned on each performance measure in the framework. However, regardless of the outcome, non-renewal would not be considered for schools up for renewal in March of 2022.

Alternatively, the IPCSC could choose to exclude ratings on the FY21 annual performance reports in the academic and financial sections. In that case, each school's performance outcome will be included on the report, but whether the outcome meets or does not meet standard will not be reflected on the reports and therefore could not influence any future renewal decisions.

STAFF COMMENTS AND RECOMMENDATIONS

IPCSC staff recommends that the IPCSC not consider revocation based on spring 2021 assessment data for schools with related renewal conditions.

IPCSC staff also recommends that the IPCSC exclude ratings in the academic and financial sections of the performance framework on FY21 annual performance reports for all schools, thereby ensuring that no future decisions to non-renew a charter will be influenced by 2021 academic or financial ratings impacted by the pandemic.

COMMISSION ACTION

1. No action; OR
2. One of the following:
 - a. A motion to not consider revocation due to a school's failure to meet established renewal conditions due on June 30th, 2021 if the conditions are specific to assessment data collected in the spring of 2021; OR
 - b. A motion to waive conditions due on June 30th, 2021 if the conditions are specific to assessment data collected in the spring of 2021; AND
3. One of the following:
 - a. To exclude ratings on the academic and financial sections of the performance framework on FY21 annual performance reports for all schools; OR
 - b. To not consider non-renewal for any school in March of 2022 based on the school's ratings earned on the academic and financial sections of the performance framework as reflected in the school's FY21 annual performance report.

VII. REVISION TO IPCSC SCHOOL POLICY

APPLICABLE STATUTE, RULE, OR POLICY

I.C. § 33-5213(2)

I.C. § 33-5205C(7)

BACKGROUND

The IPCSC maintains policy for the purpose of governance and administration of its statutory obligations. IPCSC policy was most recently updated in August of 2020.

DISCUSSION

Idaho Code requires charter school authorizers to establish policy regarding petitions for replication. A new section of IPCSC policy, Section V – Replications, has been drafted for this purpose.

It is also necessary to add a clarification between new schools and replication schools in Section II – New Charter School Petitions.

Additionally, the IPCSC has processed a greater volume of amendment requests in the past year than ever before. It has come to our attention that greater clarity regarding amendments would be useful. Specifically, the proposed revision includes greater detail regarding eligibility and required documentation for major amendments. This change is located in Section IV – Amendments.

SPEAKER

IPCSC Director, Jenn Thompson

IMPACT

Statute requires that the IPCSC adopt policy regarding replications.

STAFF COMMENTS AND RECOMMENDATIONS

As the proposed changes involve IPCSC school policy, staff recommends that the proposed revisions and additions be updated to reflect Commissioner feedback, posted online for public feedback, and included on the August meeting agenda as an action item.

COMMISSION ACTION

Any action is at the discretion of the Commission.



IPCSC Charter School Policy

Idaho Public Charter School Commission
304 North 8th Street, Room 242
Boise, Idaho 83702
Phone: (208)332-1561
pcsc@osbe.idaho.gov

Alan Reed, Chairman
Jenn Thompson, Director

IPCSC Policy
Revised 6/10/21

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Section I: PCSC Meeting Protocol

A. Submission of Meeting Materials

1. Final revisions for new charter school petitions must be received by the PCSC office no later than 5:00 p.m. Mountain Time thirty (30) calendar days prior to the scheduled hearing.
2. All other materials to be considered at a regular meeting must be received by the PCSC office no later than 5:00 p.m. Mountain Time fifteen (15) calendar days prior to the meeting date.
3. Materials to be considered at a special meeting of the PCSC must be received by the PCSC office no less than twelve (12) hours prior to the scheduled start time of the meeting.
4. Additional or revised materials may be accepted after the deadline at the discretion of the PCSC Director.
5. Additional materials and handouts may be accepted at the meeting at the discretion of the PCSC Chair.
6. All materials shall be submitted electronically via electronic mail, web-based file-sharing services, or portable data storage devices. Materials submitted as a shared document or via a shared drive not provided by the PCSC will not be accepted.

B. Public Comment

1. Members of the public may address the PCSC during regular or special PCSC meetings if so noted on the meeting agenda.
2. If public comment is on the agenda, members of the public must indicate the topic they wish to address on the sign-in sheet prior to the start of the meeting.
3. If public comment is on the agenda, members of the public will be invited to speak by the Chairman during the agenda item to which the public comment pertains.
4. Public comment unrelated to an agenda item will be allowed only if a separate public comment section is included on the agenda. In such a case, the speaker will be invited to address the PCSC during that section.
5. Public comments shall be limited to three (3) minutes.

C. Written Comment

1. Written comment may be submitted to the PCSC staff at any time.
2. Written comment must be identified as such and must include the name and contact information of the author.
3. Written comment submitted at least seven (7) days in advance of a PCSC meeting will be included in the meeting materials.
4. Written comment submitted fewer than seven (7) days in advance of a PCSC meeting will be distributed to commissioners, but may not be included in the meeting materials.
5. Written comment will be read aloud at the regularly scheduled PCSC meeting following receipt and will be limited to three (3) minutes.

D. Agenda Items Regarding PCSC Schools

1. A public charter school will be informed no less than thirty (30) days prior to any meeting at which that school is the subject of an agenda item.
2. A public charter school's governing board or its designee shall be allotted up to fifteen (15) minutes to address the PCSC during the agenda item(s) specifically related to that school. Additional time may be allowed at the Chairman's discretion.

Section II: New Charter School Petitions

A. New Charter School Petition Eligibility

1. New charter school petitions shall be considered only at regularly scheduled PCSC meetings.
2. A petition for a new charter school shall be eligible for consideration by the PCSC if all of the following are satisfied:
 - a. The new charter school petition includes all required narrative sections and all required appendices, pursuant to IDAPA 80.02.04.202; and
 - b. The new charter school petition is submitted by a governing board whose bylaws are compliant with the Idaho Nonprofit Corporation Act and fully executed, and whose articles of incorporation are filed in the state of Idaho; and
 - c. The new charter school petition includes evidence that both the petition and the letter stating the petitioners' intent to pursue authorization with the PCSC were submitted to all impacted traditional school districts at least four (4) weeks prior to submission to the PCSC.
 - d. At least one member of the petitioning group has completed the Charter Start 101 workshop, hosted by the State Department of Education.
3. A petition for a new charter school shall not be eligible for consideration by the PCSC if any of the following are true:
 - a. The petition has been denied by the PCSC within the 90 days; or
 - b. A Petition Evaluation Report for the proposed new public charter school has been issued by the PCSC staff, and the petition was subsequently withdrawn from consideration prior to the scheduled hearing within the previous 90 days;
 - c. No member of the petitioning group has completed the Charter Start 101 workshop, hosted by the State Department of Education.
4. A petition for new charter school that seeks to replicate an existing school is not eligible to apply as a new charter school. Please see Section V of these policies for more information regarding a petition to replicate.

B. New Charter School Petition Submission Requirements

1. A petition for a new charter school may be submitted to the PCSC at any time.

2. Petitions received between January 1st and September 1st, if approved, may open the following fall.
3. Petitions received between September 2nd and December 31st will be subject to the next full review cycle based on the petition's submission date. If approved, the public charter school may not begin operations until July 1 of the following year, at least eighteen (18) months after the date on which the petition was submitted.
4. New Charter School Petitions must include the following:
 - a. One Adobe PDF document comprising the petition narrative and all appendices, including the completed budget template; and
 - b. One Excel document (including formulas) comprising the completed budget template.
 - c. Materials provided by the petitioners, but not incorporated into the final PDF by the petitioners, shall not be forwarded to the PCSC for consideration.

C. New Charter School Petition Content Requirements

1. PCSC staff will maintain a New Petition Guidance document and a full description of the Standards of Quality against which a new charter school petition shall be evaluated.
2. Pursuant to IDAPA 08.02.04.202, the petition narrative shall include descriptions of the following:
 - a. Educational program; and
 - b. Financial and facilities plan; and
 - c. Board capacity and governance structure; and
 - d. Student demand and primary attendance area; and
 - e. School leadership and management; and
 - f. Virtual or blended learning model, if applicable.
3. Pursuant to IDAPA 08.02.04.202.07, New Charter School Petitions shall include all of the following appendices:
 - a. Appendix A – Budgets, including the PCSC budget template and facility option template; and

- b. Appendix B – Articles of Incorporation and Bylaws; and
 - c. Appendix C – Board of Directors; and
 - d. Appendix D - School Administration; and
 - e. Appendix E - Education Services Provider, if applicable.
4. New charter school petitions may include any additional supporting documents incorporated into the PDF as Appendix F.

D. New Charter School Petition Evaluation Timeline

1. Within thirty (30) days of receiving an eligible new charter school petition, PCSC staff will issue a Petition Evaluation Report to the petitioners for use as a revision tool.
2. PCSC staff will conduct an interview with the public charter school’s governing board for the purpose of evaluating the board’s governance capacity. A summary of the interview shall be included in the final Petition Evaluation Report.
3. Petition revisions will be accepted by PCSC staff until, and no later than thirty (30) calendar days prior to the hearing. Revisions submitted fewer than thirty (30) days prior to the hearing may be accepted at the discretion of the PCSC Director.
4. PCSC staff will issue a recommendation for approval, denial, or conditional approval to the school within twelve (12) weeks of the original submission date.
5. The PCSC will hold a hearing at the next regularly scheduled meeting following the issuance of the PCSC staff’s recommendation.
6. Materials for the hearing will consist of:
 - a. The final new charter school petition in PDF format, as submitted by the petitioners; and
 - b. The final Petition Evaluation Report, as prepared by PCSC staff; and
 - c. A cover sheet noting the PCSC staff’s recommendation.
7. At the hearing, the PCSC will issue a decision of approval, denial, or conditional approval.
8. If approved, a Performance Certificate for an initial operational term of five (5) years will be drafted by the PCSC staff, and must be executed by both parties within seventy-five (75) days from the date of approval.

9. New public charter schools must attend a pre-opening orientation meeting with PCSC staff within two (2) weeks of approval for the purpose of reviewing pre-opening requirements and timelines.
10. Denials may be appealed to the state superintendent of public instruction, pursuant to I.C. § 33-5207.

Section III. Petition for Transfer of Authorization

A. Petition to Transfer Authorization Eligibility

1. Petitions to transfer authorization of a public charter school's current Performance Certificate to the PCSC shall be considered only at regularly scheduled PCSC meetings.
2. Petitions to transfer authorization may be submitted to the PCSC at any time.
3. The term dates of a public charter school's Performance Certificate are fixed, and shall not change due to a transfer of authorization.
4. A petition to transfer authorization shall be eligible for consideration by the PCSC if both of the following are true:
 - a. The public charter school's governing board has passed a resolution stating its intent to apply for a transfer of authorization; and
 - b. The public charter school's existing authorizer has provided written support of the public charter school's intent to apply for a transfer of authorization.
5. A petition to transfer authorization shall not be eligible for submission if:
 - a. The petition to transfer authorization has been denied by the PCSC within the previous 90 days; or
 - b. Either the public charter school's governing board or the public charter school's current authorizer do not wish to pursue the transfer.

B. Petition to Transfer Authorization Submission Requirements

1. Initial petitions to transfer authorization must include the following:
 - a. A petition narrative as described in Section II.C.2 of these policies; and
 - b. The school's current-year board-approved annual budget; and
 - c. The school's most recent financial audit; and
 - d. Written notification from the existing authorizer indicating that it agrees to the pursuit of a transfer of authorization; and
 - e. The school's existing Performance Certificate, including the Performance Framework, and any other applicable appendices or conditions.
2. Final petition to transfer authorization must also include the following:

- a. The proposed PCSC Performance Certificate, including the Performance Framework, as applicable to the public charter school under PCSC authorization; and
- b. Written confirmation from the school's existing authorizer that it has reviewed the materials included in the final submission, particularly the proposed Performance Certificate, and agrees to the transfer of authorization.

C. Petition to Transfer Authorization Evaluation Timeline

1. Within thirty (30) days of submission, PCSC staff will provide to the petitioner:
 - a. A Petition Evaluation Report outlining any concerns with regard to the PCSC's Standards of Quality; and
 - b. A draft Performance Certificate, as applicable to the public charter school under PCSC authorization.
2. A hearing shall be scheduled within twelve (12) weeks of the original submission date.
3. The PCSC will issue a decision to approve or deny the petition to transfer authorization at the scheduled hearing.
4. If approved, the transfer of authorization shall be effective on the following July 1st.
5. Denials may be appealed to the State Board of Education, pursuant to I.C. § 33-5209A.

Section IV: Amendments

A. Eligibility for Amendment

1. A public charter school or its authorizer may enter into negotiations to revise a Charter or Performance Certificate at any time.
2. The PCSC shall not approve requests for amendments if any of the following are true:
 - a. The amendment proposes to increase enrollment or to change the grade levels served and the school did not meet standard on all measures of the Performance Framework, as reported on the most recent Annual Performance Report; or
 - b. The amendment proposes to increase enrollment or to change the grade levels served, or to increase the rate of growth toward capacity and the school is operating on an initial Performance Certificate term; or
 - c. The amendment proposes to adjust sections of the Charter or Performance Certificate that are relevant to the reasons for possible non-renewal or revocation and the PCSC has issued notification of potential non-renewal or either revocation proceedings or closure protocol have begun.
3. Proposed Charter or Performance Certificate amendments shall include the following:
 - a. A cover letter explaining the nature of and rationale for the proposed amendments; and
 - b. One Adobe PDF document comprising the section(s) of the Charter or Performance Certificate to be amended; and
 - c. One Adobe PDF document comprising any supporting documentation, including budgets and/or notifications to the traditional district, if applicable.

B. Consideration of Minor Amendments

1. The PCSC Director has the authority to approve minor amendments to a school's Charter or Performance Certificate.
2. Minor amendments include, but are not limited to:
 - a. Changes in enrollment numbers by grade if the amendment does not impact the school's approved enrollment capacity or grades served;

- b. Changes in enrollment capacity if the amendment does not increase the school's approved enrollment capacity by more than 10% over the course of the Performance Certificate term and the amendment does not change the approved grade levels served;
 - c. Changes to the school's mission, vision, or key design elements to reflect strategic planning if the amendment does not significantly change the instructional model;
 - d. Changes to the school's primary attendance area for the purposes of clarifying the intent of the existing area; or
 - e. Changes to the school's Charter to include statutorily allowable enrollment preference categories.
3. Notification of approval or denial by PCSC staff of any minor amendment will be issued to the public charter school within thirty (30) days of submission.
 4. Amended Charters or Performance Certificates shall be fully executed by both parties within thirty (30) days of receiving notification of approval.
 5. If the amended Performance Certificate or Charter is not executed by both parties within thirty (30) days of notification of approval, the amendment shall be considered failed and the Performance Certificate or Charter will revert to its state prior to the failed amendment.

C. Consideration of Major Amendments

1. Major amendments will be considered by the PCSC only at regularly scheduled meetings.
2. Major amendments include, but are not limited to:
 - a. Changes to the public charter school's enrollment capacity of more than 10% over the course of the Performance Certificate term;
 - b. Changes to the grade levels served by the public charter school;
 - c. Changes to the school's instructional model of such significance as to require the section of the charter to be rewritten; or
 - d. Any amendment that does not otherwise qualify as minor according to Section IV.B.2.

3. ~~A written review by PCSC staff of any major amendment shall be issued to the charter holder within thirty (30) days of submission.~~ Upon submission of a request to expand a school's enrollment by ten percent (10%) or more, or to increase the grade levels served:
 - a. the IPCSC will notify any school districts and charter schools that may be impacted by the major amendment request.
 - b. The IPCSC will schedule the amendment for consideration at a regularly scheduled IPCSC meeting at least thirty (30) days after submission.
4. The PCSC shall schedule the amendment for consideration at a regularly scheduled PCSC meeting at least 30 days after submission.
5. ~~Revision of the proposed Charter or Performance Certificate amendment will be accepted by PCSC staff, provided the revision is submitted no less than fifteen (15) calendar days prior to the scheduled hearing.~~ A request to expand a charter school that results in a single local education agency (LEA) occupying multiple campuses may be considered as an amendment as long as all campuses are located within five (5) miles of the original campus. Should an expansion be located more than five (5) miles from the original campus, the petition may not be submitted as an amendment, but may be considered as a replication.
6. The PCSC shall will approve or deny proposed Charter or Performance Certificate amendments at the hearing at which they are considered.
7. Amended Charters or Performance Certificates must be fully executed by both parties within thirty (30) days of approval.
8. If the Amended Performance Certificate or Charter is not executed by both parties within thirty (30) days of approval, the amendment shall be considered failed and the Performance Certificate or Charter will revert to its state prior to the failed amendment.

Section V: Replication

A. Eligibility for Replication

1. Petitions to replicate an existing charter school shall be considered only at regularly scheduled PCSC meetings.
2. A petition for a replication shall be eligible for consideration by the IPCSC if all of the following are satisfied:
 - a. The school being replicated has completed at least one (1) renewal cycle and has been renewed without conditions; and
 - b. The replication must serve the same, or a subset of the same, grades as are served in the school being replicated.
 - c. The replication must implement the same model as implemented by the school being replicated.
 - d. The charter holder has operated all schools for which it holds a performance certificate for at least one (1) complete school year.
 - e. The petition requests no more than one (1) replication.
3. A petition for a replication shall not be eligible for consideration by the IPCSC if any of the following are true:
 - a. The school is currently operating on a conditional performance certificate; or
 - b. The charter holder currently holds one (1) or more charters for schools that has not operated for one full fiscal year.

B. Replication Petition Submission Requirements

1. A petition for replication may be submitted to the IPCSC at any time.
2. Petitions received between January 1st and September 1st, if approved, may open the following fall.
 - a. Upon submission of a petition to replicate a school, the IPCSC will notify any school districts and charter schools that may be impacted by the replication petition.
 - b. The IPCSC will schedule the petition for consideration at a regularly scheduled meeting at least thirty (30) days after submission.

3. The PCSC shall schedule the petition for consideration at a regularly scheduled IPCSC meeting at least 30 days after submission.
4. A replication petition must include all of the following:
 - a. A description of the capacity of the charter holder to successfully govern multiple schools and manage the replication process;
 - b. A description of how the charter holder will maintain high academic performance (based on the PCSC Framework) at all campuses for which the charter holder is responsible;
 - c. A description of how the charter holder will incorporate representation and input in the school operations from the local area where the new school will be located if the location is outside of the traditional school district in which the school being replicated is physically located;
 - d. A facility plan;
 - e. A financial plan;
 - f. A description of the proposed primary attendance area; and
 - g. Evidence of student demand in the proposed primary attendance area.
5. The PCSC will approve or deny replication petitions at the hearing at which they are considered.
6. A performance certificate for approved replications will be executed within seventy-five (75) days of approval.

Section VI: Reporting

C. Governing Documents

1. No charter school may commence operations without a Performance Certificate executed within seventy-five (75) days of charter approval.
2. A Performance Certificate will outline the terms and conditions under which a charter school is authorized to operate.
3. All Performance Certificates will include Performance Framework that outlines the specific standards and outcomes the school must achieve in order to earn subsequent operational terms.
4. The Performance Framework shall include indicators, measures, and metrics in the following categories:
 - a. Academic achievement,
 - b. Operational effectiveness,
 - c. Financial health, and
 - d. Board stewardship

D. Annual Performance Reports

1. Annual Performance Reports will be prepared by PCSC staff and shall include the following:
 - a. The school's status with regard to the terms of its Performance Certificate;
 - b. The school's performance outcomes as evaluated against its Performance Framework;
 - c. The school's status with regard to any renewal conditions included in its existing Performance Certificate, if applicable;
 - d. Longitudinal data reflecting the school's performance over the course of the previous three (3) operational years; and
 - e. The school's status with regard to any mission-specific goals, if such are included in its Performance Framework.
2. Public charter schools may submit corrections and/or clarifications to the Annual Performance Report within thirty (30) days of issuance of the report.

3. Corrections and/or clarifications must be submitted to the PCSC office in writing, and must include a cover sheet clearly identifying each correction or clarification and the supporting documentation.
4. Annual Performance Reports will be published on the PCSC's website no later than January 31st.
5. PCSC staff will prepare and publish an annual report addressing the performance of all schools authorized by the PCSC. This report will be published on the PCSC's website no later than January 31st.

E. Required Reports

1. Public charter schools authorized by the PCSC must submit the following reports annually by the following dates, or as requested:
 - a. July 30th
 - i. The school's leadership update, noting any changes to board directors, administrative staff, or key operational staff. This report also requires confirmation of contact information and assurance that all compliance issues that occurred during the previous fiscal year were reported to the PCSC as required;
 - ii. The school's board-approved annual budget for the current fiscal year (any subsequent amendments must be submitted within five (5) days of the change);
 - iii. The school's projected enrollment by grade level on which the submitted annual budget is based;
 - iv. A projected cash flow report for the current fiscal year; and
 - v. If applicable, any data necessary to evaluate the school's performance against mission-specific goals that are included in the school's Performance Framework.
 - b. November 1st
 - i. A board-approved independent fiscal audit report for the previous fiscal year.
 - c. February 1st
 - i. A balance sheet and a budget-to-actuals report as of the end of the second quarter of the fiscal year.

- d. A public charter school that did not meet standard on any financial measures of the most recently issued Annual Performance Report must also submit the following financial documentation:
 - i. A balance sheet, due November 1st and May 1st to reflect the first and third quarters of the fiscal year, respectively; and
 - ii. A budget to actuals report, due November 1st and May 1st to reflect the first and third quarters of the fiscal year, respectively; and
 - iii. An updated cash flow report for the current fiscal year, due quarterly on November 1st, February 1st, and May 1st.

F. Reporting Standards

1. A public charter school shall be considered a governmental entity. As such, public charter schools shall follow and adhere to the standards established by the Government Accounting Standards Board (GASB).
2. Budgets shall be completed on an accrual basis, with year-end balances including encumbrance. That is, revenue intended for use in one fiscal year may not be used to demonstrate fiscal stability by covering expenditures that should have been paid using revenue from the previous fiscal year.
3. Cash flow projections shall be completed on a cash basis, showing actual cash amounts and projections with funds moving out at the appropriate, anticipated time.

G. Required Documentation

1. Public charter schools must submit copies of the following documents prior to operating and must notify the PCSC of any changes within five (5) days:
 - a. Facility lease agreement, if instructional facilities are leased; and
 - b. Certificate of occupancy for all instructional facilities; and
 - c. Accreditation reports; and
 - d. Board bylaws; and
 - e. Contact information for each board member (including full name, phone number, address, email address, and resume).
2. Public charter schools must notify the PCSC within five (5) days if the administration or the governing board becomes aware of any of the following

circumstances:

- a. The school may have violated the terms of its Performance Certificate;
 - b. The school may have violated an applicable laws, rules, or regulations;
 - c. A lawsuit has been filed against the school;
 - d. A complaint against an employee of the school has been filed with the Professional Standards Commission; or
 - e. The school's board passes a motion to relinquish its charter.
3. A public charter school must provide copies of the following insurance binders to the PCSC prior to operating:
- a. Liability;
 - b. Property loss;
 - c. Worker's compensation;
 - d. Unemployment; and
 - e. Health.
4. Pursuant to IDAPA 08.03.01.300, a public charter school must provide the following documents to the PCSC prior to beginning operations in an initial or any subsequently acquired facility:
- a. Building inspection report from the Idaho Division of Building safety;
 - b. Fire marshal report for the site; and
 - c. Health district inspection certificate issued by the appropriate health district for the site.
5. The PCSC or its staff may request additional reports on an as-needed basis for the purpose of fulfilling its duty to oversee the public charter school's compliance with applicable laws, rules, and regulations, including the school's Performance Certificate and Performance Framework.

H. Authorizer Fee

1. Authorizer fees shall be calculated pursuant to I.C. § 33-5208(8).

2. PCSC staff will issue authorizer fee invoices no later than February 15th each year.
3. Authorizer fees shall be due to the PCSC no later than March 15th each year.
4. A public charter school may redirect up to 10% of the assessed fee to pay membership fees to an organization that provides technical assistance, training, and advocacy for Idaho public charter schools. Receipts must be remitted with payment as proof of purchase.
5. A public charter school will be notified within thirty (30) days of the due date if payment is delinquent. In such a case, the amount due will be withheld from the next scheduled payment distribution until such time as the school remits payment in full, pursuant to IDAPA 08.02.04.102.

Section VII: Public Charter School Oversight

A. General Oversight

1. All public charter schools authorized by the PCSC shall be continuously monitored for compliance with all applicable laws, rules, regulations, and the terms of the Performance Certificate.
2. All public charter schools authorized by the PCSC shall be annually evaluated against the Performance Framework to determine performance outcomes.
3. The PCSC will consider the reporting burden of public charter schools when requesting reports, and will utilize data and reports prepared by the State Board of Education, the State Department of Education, and/or PCSC staff whenever possible.
4. If a public charter school is accredited by a State Board of Education approved accrediting agency, the PCSC shall accept accreditation reports in lieu of conducting a site visit for the purpose of establishing whether the school is effectively implementing its Key Design Elements as stated in its Performance Certificate.
5. If a public charter school is not accredited by a State Board of Education approved accrediting agency, the PCSC will conduct a site visit once during the public charter school's Performance Certificate term for the purpose of evaluating whether the school is effectively implementing its Key Design Elements as stated in its Performance Certificate.
 - a. The public charter school will receive written notice of a site visit for this purpose at least thirty (30) days prior to the visit, and whenever possible, the site visit will be scheduled at a time convenient for the public charter school.
6. The PCSC may make additional site visits for the following purposes:
 - a. Conducting a pre-opening site visit with advanced notice for the purpose of determining the school's readiness to begin operations.
 - b. Observing the enrollment lottery once per Performance Certificate term with advanced notice and for the purpose of evaluating operational compliance;
 - c. Observing a governing board meeting once per Performance Certificate term with advanced notice and for the purpose of evaluating operational compliance;
 - d. Investigating concerns regarding compliance with any applicable laws, rules, regulations, or the performance certificate with or without notice;

and/or

B. Complaints

1. PCSC staff shall log all complaints against a public charter school it authorizes within five (5) business days of receiving the complaint.
2. PCSC staff shall notify the public charter school's governing board and primary administrator of the complaint within five (5) business days of receiving the complaint.

C. Investigations

1. PCSC staff shall investigate the validity of complaints alleging that a public charter school may be in violation of an applicable law, rule, regulation, or term of its Performance Certificate.
2. If the PCSC staff has reason to believe that a violation may have occurred, or that more specific expertise is required to determine whether a violation has occurred, the PCSC staff shall provide notice of its concerns to both the Charter holder and the entity responsible for enforcing the law, rule, or regulation in question.
3. Enforcement of the law, rule, or regulation that has been violated will be the responsibility of the entity with the authority to enforce that law, rule, or regulation.
4. If the public charter school is in violation of the terms of its Performance Certificate, the PCSC shall issue a Courtesy Letter defining the violation and the date by which the violation must be resolved. PCSC shall engage in progress-monitoring for the purpose of enforcing compliance.
5. Progress-monitoring plans will be documented, and may include additional site visits, desk audits, and/or meetings.
6. A public charter school's Annual Performance Report shall include record of any PCSC staff investigation concluding that a violation occurred, and record of any findings or violation identified by an entity responsible for enforcing an applicable law, rule, or regulation.

D. Courtesy Letters

1. Courtesy letters may be issued to a public charter school for any reason at the discretion of the PCSC Director.
2. Courtesy letters will be issued to a public charter school if any of the following circumstances arise:

- a. The PCSC has reason to believe the school may be in violation of a law, rule, regulation, or the terms of its Performance Certificate;
 - b. The PCSC has reason to believe that the public charter school may not be able to remain fiscally viable for the remainder of its Performance Certificate term;
 - c. To request any reports in addition to those described in Section V.C of these policies;
 - d. To request any documentation necessary to conduct the PCSC's oversight duties;
 - e. To inform the school of a progress-monitoring plan; and/or
 - f. To inform the school of potential or executed actions of the PCSC that impact the operations of the public charter school, including, but not limited to, non-renewal or revocation of the school's Performance Certificate or changes to PCSC policy.
3. Courtesy letters shall be for the purpose of ensuring that the public charter school is formally made aware of a concern, request, or required action.
 4. The issuance of a courtesy letter and the receipt of documented resolution of a concern identified in a courtesy letter will be noted in the public charter school's Annual Performance Report.

E. Written Notification of Fiscal Concern

1. If the PCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its Performance Certificate term, the PCSC shall issue to the State Department of Education a written notification of concern.
2. A notification of fiscal concern shall be issued by the PCSC for the purpose of protecting taxpayer dollars and shall cause the public charter school's funding to be distributed in equal percentages across the regularly scheduled distribution dates for the fiscal year following issuance.
3. A public charter school shall be considered financially stable if the school met all financial standards on the most recently issued Annual Performance Report.
4. A public charter school may also be considered financially stable if the public charter school did not meet all of the financial standards on the most recently issued Annual Performance Report, but all of the following are true:

- a. The public charter school's fiscal audit indicates a positive year-end fund balance for the previous fiscal year; and
 - b. The public charter school maintained a positive cash flow during the current fiscal year; and
 - c. The public charter school is able to service all current-year financial obligations without relying on revenue intended for use in future fiscal years; and
 - d. The public charter school did not engage in any new long or short term debt during the current fiscal year.
5. Written notifications of fiscal concern shall be considered for issuance, continuation, or removal only at the PCSC's regularly scheduled June meeting.
 6. Written notifications of fiscal concern shall be in effect for the entire fiscal year.
 7. Public charter schools wishing to have written notifications of fiscal concern considered for removal must provide a cover letter and documentation evidencing fiscal stability at least fifteen (15) days in advance of the scheduled meeting.

Section VIII: Renewal, Non-Renewal, and Revocation

A. Renewal Standards

1. The PCSC shall make renewal, non-renewal, or conditional renewal decisions in compliance with I.C. § 33-5209B.
2. The PCSC shall consider a school's demographic profile and other circumstances that may affect the school's ability to adhere to the terms and conditions of its Performance Certificate when making renewal or non-renewal decisions.
3. The PCSC shall base its renewal decisions on:
 - a. The school's performance outcomes as evaluated against the school's Performance Framework; and
 - b. The school's fiscal audits; and
 - c. The terms of the school's Performance Certificate.
4. The PCSC shall renew a charter, thereby granting a subsequent Performance Certificate term, to any public charter school that met all of the terms of its Performance Certificate (including the Performance Framework) on the Performance Report issued on the November 15th preceding the renewal decision. Schools in this category are exempt from submitting a renewal application.
5. The PCSC may renew, non-renew, or renew with conditions any Charter in which the public charter school failed to meet one (1) or more of the terms of its Performance Certificate (including the Performance Framework).
6. All renewals, including conditional renewals, will be for a term of five (5) years.
7. Conditional renewals shall include specific, written conditions for necessary improvement, including the mid-term date by which the condition(s) must be met, in the Performance Certificate. If a school fails to meet any written condition for necessary improvement by the mid-term date specified in the school's Performance Certificate, the PCSC shall consider whether to begin revocation proceedings at the next regularly scheduled meeting, in accordance with Section VII.3 of these policies.

B. Renewal Process

1. The PCSC shall conduct its renewal process in accordance with I.C. § 33-5209B.
2. A performance report shall be issued by the PCSC to all schools by November 15th preceding the school's renewal year. The performance report shall include a summary of the school's performance record to date and, if applicable, notice of

any weaknesses or concerns that may jeopardize renewal.

3. A school may submit a response to the performance report for the purpose of providing relevant clarification or corrections within thirty (30) days of issuance.
4. Renewal guidance and application requirements shall be provided to each schools by November 15th of its renewal year.
5. No later than December 15th, public charter school must submit a renewal application in accordance with the Renewal Guidance Document.
6. No later than January 15th, PCSC staff will notify the school of its proposed recommendation, including any recommended conditions and/or the prospect of non-renewal when applicable.
7. No later than March 15th, the PCSC will hold a meeting for the purpose of making final renewal or non-renewal determinations regarding all renewal-year schools. In preparation for the meeting, the PCSC will be presented with a dossier for each school. The dossier will include at least the following:
 - a. A cover sheet including the PCSC staff's recommendation;
 - b. The school's performance report;
 - c. The school's response to the performance report, if submitted; and
 - d. The school's renewal application, including any additional evidence supporting its case for renewal and any improvements it has planned or has undertaken, as submitted by the school.
8. All public charter schools for which the PCSC is making a renewal decision may present relevant information during the renewal-determination meeting.
9. Any public charter school facing non-renewal may request a separate hearing. In such a case, the PCSC may delegate the hearing of evidence to a hearing officer, or may hear evidence itself.
10. Final renewal or non-renewal determinations will be conveyed in writing to the public charter school and the State Board of Education within fourteen (14) days of the decision.
11. A decision to non-renew may be appealed directly to the State Board of Education pursuant to I.C. § 33-5209C(8).

C. Revocation Process

1. A public charter school that has failed to meet a specific, written condition by the date specified in the school's current Performance Certificate may have its Charter revoked.
 - a. The PCSC will annually communicate to each school in writing the public charter school's progress toward meeting any conditions for necessary improvement included in its Performance Certificate.
 - b. If a school fails to meet an established condition by the date specified in its Performance Certificate, the PCSC will consider whether to begin revocation proceedings at the next regularly scheduled commission meeting.
 - c. A decision to begin revocation proceedings will be issued to the public charter school in writing.
 - d. If closure proceedings must begin, the school will be notified in writing, and the school must cease to operate by June 30th of the current school year.
 - e. A decision to revoke may be appealed directly to the State Board of Education pursuant to I.C. § 33-5209C(8).
2. A public charter school with insufficient access to unrestricted cash may have its Charter revoked pursuant to I.C. § 33-5209C.
 - a. If a school's independently-audited financial report reflects fewer than fifteen (15) days of unrestricted cash on hand, the PCSC will notify the school of the prospect of closure no later than November 30th.
 - b. If the school's next consecutive independently-audited financial report (e.g., the following year) again reflects fewer than fifteen (15) days of unrestricted cash on hand, the PCSC must begin closure protocol by November 30th.
 - c. If closure proceedings must begin, the school will be notified in writing, and the school must cease to operate by June 30th of the current school year.
 - d. Initiation of revocation due to insufficient access to unrestricted cash may be appealed directly to the State Board of Education pursuant to I.C. § 33-5209C.

D. Closure Protocols

1. The implementation of closure protocol shall begin immediately following the issuance of:

- a. Written notification of the PCSC's non-renewal decision; or
 - b. Written notification of the PCSC's decision to revoke; or
 - c. Written notification of the public charter school's decision to relinquish its Charter.
2. Within three (3) business days of the implementation of closure protocol, representatives of the public charter school's board and administration shall meet with staff representatives of the PCSC and the SDE to review and begin the PCSC's closure protocol.
 3. The closure protocol must begin regardless of whether or not a school has chosen to appeal the decision.
 4. The school shall cooperate with the PCSC and the State Department of Education through the closure process, and shall perform the following actions according to PCSC closure protocol:
 - a. Notify stakeholders (e.g., parents, local districts, etc.) of closure; and
 - b. Develop and monitor implementation of the closure plan; and
 - c. Provide 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; and
 - d. Assist students in transferring to, or applying for, enrollment at schools that meet their educational needs; and
 - e. Address the school's financial, legal and reporting obligations.

VIII.A. FINAL CONSIDERATION OF ITEMS RELATED TO IPCSC AGENCY STATUS

APPLICABLE STATUTE, RULE, OR POLICY NA

BACKGROUND

As the IPCSC transitions into an independent agency, several new documents and decisions will now be the responsibility of the IPCSC.

DISCUSSION

The IPCSC engaged in a full review of proposed personnel policy, a proposed strategic plan, a proposed MOU, and the FY22 budget on 6/9/2021. Any minor revisions will be presented the following day, 6/10/2021, for final approval.

If minor revisions were not necessary, and agenda items were approved on 6/9/2021, no further action is necessary.

SPEAKER

IPCSC Director, Jenn Thompson

IMPACT

Personnel policy, a strategic plan, an MOU, and the FY22 budget must be approved by the IPCSC prior to July 1, 2021.

STAFF COMMENTS AND RECOMMENDATIONS

No comments or recommendations.

COMMISSION ACTION

No action; OR

A motion to approve the following as presented:

- the proposed personnel policy; AND/OR
- the proposed strategic plan; AND/OR
- the proposed MOU as presented; AND/OR
- the proposed FY22 budget.

VIII.B. DIRECTOR'S EMPLOYMENT AGREEMENT AND JOB DESCRIPTION

APPLICABLE STATUTE, RULE, OR POLICY

I.C. § 33-5213

BACKGROUND

The current IPCSC Director was originally hired by the Executive Director of the Office of the State Board of Education in February of 2020. As of July 1, 2021, the IPCSC Director will become a direct report of the Idaho Public Charter School Commission.

DISCUSSION

The IPCSC Director's current employment agreement and job description must be edited to reflect the new structure and must be executed by the Idaho Public Charter School Commission for the record.

SPEAKER

IPCSC Director, Jenn Thompson

IMPACT

If the IPCSC approves the proposed revisions, documentation will be submitted to human resources and filed in the Director's personnel file.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

A motion to approve the edits to the IPCSC Director's employment agreement and job description as presented; OR

A motion to grant signing authority of the employment agreement to the IPCSC Chairman, after the following edits have been made: _____.

Idaho Public Charter School Commission

Director

PURPOSE

The Idaho Public Charter School Commission Director is designated by the Executive Director of the State Board of Education serves at the pleasure of the Idaho Public Charter School Commission. The IPCSC Director to serve as secretary to the Idaho Public Charter School Commission (IPCSC). The IPCSC Director, acting at the direction of the Executive Director, is responsible for ensuring fulfillment of the IPCSC's stated mission. This position develops and implements strategies for efficient and effective oversight of the IPCSC's portfolio schools, provides leadership for the development of policy related to public charter schools in Idaho, and supports and represents the IPCSC across the scope of its function as Idaho's independent charter school authorizer.

KEY RESPONSIBILITIES

- Researches, develops, and implements oversight tools and processes to ensure compliance and performance monitoring of IPCSC portfolio schools.
- Analyzes and investigates reports regarding portfolio schools, and advises the IPCSC on matters related to the oversight of such schools.
- Ensures implementation of IPCSC action and direction.
- Represents the IPCSC to various groups, agencies, organizations, and media.
- Coordinates legislative efforts for the IPCSC. ~~in accordance with the will of the State Board of Education (SBOE)~~
- Ensures compliance with federal and state laws.
- ~~Performs other duties as may be assigned by the executive director of the SBOE.~~
- Performs office management and supervisory duties including budget management strategic planning, and employee evaluation.

PRINCIPAL ACCOUNTABILITIES

IPCSC Portfolio School Oversight

- Serves as liaison between IPCSC and portfolio schools.
- Ensures meaningful evaluation of new charter petitions for quality, preparedness, and community impact.
- Ensures ongoing compliance and performance oversight of IPCSC portfolio schools through site visits, written reports, and dialogue with school boards and administration.
- Develops and implements processes and policies related to charter school oversight in accordance with best practices.
- Conducts investigations of alleged non-compliance and implements corrective action as necessary in accordance with statute, administrative procedures, and policies.
- Remains abreast of national trends, research, and best practices relevant to charter school authorizing.

IPCSC Relations

- Conducts IPCSC and SBOE business related to public charter schools in accordance with applicable state and federal laws, administrative procedures, and policies.

- Carries out IPCSC direction to staff and enforces portfolio schools' compliance with IPCSC direction.
- Informs and advises the IPCSC regarding petitions, portfolio schools' compliance and performance, and various matters related to charter school authorization.
- Participates in discussion and development of state policies related to public charter schools and recommends changes in legislation, administrative procedures, and IPCSC policies.
- Fosters continuous improvement of charter school oversight strategies through identification and implementation of best practices.

Administrative Functions

- Supervise ~~SBOE staff assigned to the~~ IPCSC ~~staff~~.
- Prepares and operates within IPCSC annual operating budgets.
- Ensures maintenance of IPCSC records as required by law.

Public Relations

- Represents IPCSC to state legislature; local, state, and national charter school organizations; public charter school stakeholders; and the public at large.
- ~~Coordinates with SBOE staff to r~~Responds to media inquiries on behalf of the IPCSC.
- ~~Coordinates with SBOE staff to r~~Responds to public records requests.

MINIMUM QUALIFICATIONS

- Undergraduate degree from an accredited college or university, with emphasis in a related field. An advance degree, work toward an advanced degree, or other comparable experience will be considered.
- Strong working knowledge of state and federal educational law, particularly as it pertains to public charter schools and demonstrated ability to apply such knowledge in diverse circumstances.
- Extensive historical knowledge of Idaho's public charter schools and related public policy matters.
- Understanding of Idaho's legislative process.
- Excellent written and verbal communications skills, including public speaking and ability to compile and summarize complex material.
- Demonstrated ability to initiate, research, develop, and implement multiple complex projects and programs simultaneously, with minimal direction.
- Demonstrated ability to maintain effective working relationships with a diverse population, including charter and traditional school boards and administrators, elected and public officials, agency staff, and the public at large.
- Demonstrated ability to manage and lead both professional and administrative staff.
- Demonstrated ability to make complex unbiased decisions in unique and often confrontational situations.
- Demonstrated ability to assimilate and apply new information and skills as necessary to fulfill the IPCSC's mandate.
- Ability to travel for school oversight and professional development purposes.



January 31, 2020

June 10, 2021

Jennifer J Thompson
5539 E Bay Trail Court
Boise, ID 83716

Dear Jenn,

With this letter I am pleased to offer you the continued position of Public Charter School Commission Director which was originally effective February 10th, 2020 under the Office of the State Board of Education, and becomes effective July 1st, 2021 under the Idaho Public Charter School Commission. This position will have a rate of pay of \$50.00 per hour or \$104,000.00 gross based on 2,080 hours worked. This position reports directly to me the Idaho Public Charter School Commission (IPCSC) and will be subject to the evaluation process adopted by the IPCSC and compliant with applicable Division of Human Resources policy.

This position is over-time and comp-time exempt. You will be eligible for the standard benefits provided to employees of the State Board of Education, including retirement, life insurance, health insurance, vacation and sick leave, and tuition benefits.

Your position as Public Charter School Commission Director is a non-classified, at-will position and serves at the pleasure of ~~the Executive Director~~ the Idaho Public Charter School Commission. You are subject to the requirements and laws of the State of Idaho and the Idaho State Board of Education's Governing Policies and Procedures. For further information on non-classified employment ~~at the Office of the State Board of Education,~~ you may refer to the ~~Idaho State Board of Education's Governing Policies and Procedures, Section II~~ (http://www.boardofed.idaho.gov/policies/ii_policy.asp). The Division of Human Resources (<https://dhr.idaho.gov/information-for-state-employees/>) and IPCSC Personnel Policy. These policies and procedures provide information related to your employment, but do not constitute a contract or guarantee of continued employment. ~~Board p~~olicies and procedures may be changed during your employment at the IPCSC ~~Office of the State Board of Education.~~ Questions concerning these policies and procedures or employment benefits can be addressed to Alan Schoenwald, the IPCSC Human Resources Officer.

Finally, this Offer of Employment implies no contract, constitutes the entire terms of the Offer, and supersedes any prior oral or written terms or understandings with respect to the same subject matter. No amendment or modification of this Offer shall be effective unless in writing, signed by yourself and the ~~Executive Director.~~ IPCSC.

Please confirm acceptance of this employment offer by signing this letter and the enclosed job description, and return both documents to the ~~Office of the State Board of Education~~ [IPCSC Human Resources Officer](#).

We look forward to working with you.

Sincerely,

~~Matt Freeman~~
~~Executive Director~~
~~Idaho State Board of Education~~
[Alan Reed](#)
[Chairman, Idaho Public Charter School Commission](#)

By my signature below I hereby confirm acceptance of this employment offer, and the terms thereof as set forth above, as Public Charter School Commission Director at the Idaho Public Charter School Commission.

NAME

Date

IX. EXECUTIVE SESSION: DIRECTOR'S EVALUATION

APPLICABLE STATUTE, RULE, OR POLICY

I.C. § 33-5213

I.C. § 74-206(1)(b)

BACKGROUND

Pursuant to I.C. § 74-206(1)(b), the IPCSC will enter executive session for the purpose of considering the annual performance evaluation of its Director.

For FY21, the OSBE Executive Director, Matt Freeman, conducted the IPCSC Director's annual performance evaluation. Annual performance evaluations impact merit pay and establish professional goals for the upcoming fiscal year.

DISCUSSION

On July 1, 2021, the IPCSC Director will no longer report to Mr. Freeman. Instead, the Director will report to the IPCSC which will be responsible for conducting future performance evaluations and making recommendations for any changes to employee compensation that impact the Director.

As progress toward the goals established in the current evaluation will be monitored by the IPCSC, the IPCSC will review the Director's annual evaluation as presented.

SPEAKER

Alan Reed, IPCSC Chairman.

IMPACT

NA

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

Upon returning to open session: No action.