



Charter School Application: Founding Group-State Board Model

IOWA DEPARTMENT OF EDUCATION

Instructions

The required criteria and evaluation of charter school applications shall be completed pursuant to Iowa Code chapter 256E, and are detailed in the Application Guidance to Create a Founding Group-State Board Model Charter School. Please carefully read the guidance before beginning this application. For items that require attachments please utilize designated appendices. **It is highly recommended that potential applicants seek technical assistance from the Iowa Department of Education (Department) prior to beginning a charter school application.** Contact information is available within the guidance, application, and the [Charter School Webpage](#).

Introduction

This application is to only be submitted by an independent founding group* wishing to establish and operate a Founding Group-Iowa State Board of Education (State Board) model charter school within the boundaries of the state that operates as a new attendance center (i.e., school building) independently from a public school district.

*"Founding group" means a person, group of persons, or education service provider [or "an education management organization, charter school management organization, or other person with whom a charter school contracts for educational program implementation or comprehensive management"] that develops and submits an application for a charter school to the state board under this chapter" (Iowa Code § 256E.2(4)-(5)).

Application Submission Requirements

For an application to be reviewed, the founding group must complete and submit this form with all its required attachments by November 1, 11:59 pm of the school year preceding the establishment of the charter school. **Each question on the form is required and incomplete applications may not be reviewed for approval.** The founding group must submit the completed application form, and all its attachments, via email to janet.boyd@iowa.gov or by mail to:

Iowa Department of Education
Attention: Janet Boyd, Charter School Consultant
400 East 14th Street
Des Moines, Iowa 50319-0146

Technical Assistance Available by Request

It is strongly encouraged that applicants contact the Department to receive technical assistance before completing the application. If the independent founding group wishes to utilize technical assistance, it must contact Janet Boyd at janet.boyd@iowa.gov or 515-745-3385 before submission. Once an application is submitted, it is considered final, and no additional changes will be accepted.

Additional Guidance

For additional information on the requirements and evaluation process, see the Founding Group-State Board application guidance on the [Charter Schools webpage](#).

2024-2025 Charter School Application: Founding Group-State Board Model

Please note that all information submitted in the charter school application is public information.

Applicant Contact Information

First Name:	<u>Raymond</u>	Last Name:	<u>Ravaglia</u>
Email Address:	<u>rravaglia@opportunityeducation.org</u>	Phone Number:	<u>650 387 2223</u>

1. Executive Summary

1.1. Provide an executive summary of the proposed charter school.

Briefly summarize the proposed charter school's ability to meet the charter school purposes outlined in Iowa Code section 256E.1, subsection 3, (see the Purposes of Charter Schools section of the guidance).

Opportunity Education has supported two private Quest Forward High Schools in Santa Rosa, CA, and Omaha, NE, since 2017. These schools have focused on providing an excellent, accessible education to a small community of students, focusing on the principles of engaged, active, and skills-forward learning that are also at the core of the proposed school in Cedar Rapids. These schools are unique in having the dual mission of, first, serving their students, and second, incubating some of the technologies and curricular and instructional strategies that will shape Quest Forward Charter School - Cedar Rapids. In both capacities, they have positioned Opportunity Education to serve students in Iowa through sound strategies developed for and among comparable student populations.

Opportunity Education was founded on the principle that every child can learn through the use of active learning, a skills-forward approach and a frequent action-oriented feedback cycle. Opportunity Education's Quest Forward High Schools use a technology-supported approach to provide teachers professional development, track engagement with students, enable students to learn in a differentiated manner, and to provide seamless feedback on assignments. These tools provide teachers the ability to become more efficient inside and outside of the classroom. Additionally, these tools allow students to gain ownership in their education, by providing them the flexibility to learn skills which will make them productive citizens in our global society.

Quest Forward Charter School Cedar Rapids pledges to deliver a comprehensive education, preparing students for a broad range of college options and future professions alike. From middle school through high school, students will develop learning skills, work skills, and essential habits that will bolster domain specific knowledge and enable them to succeed in the global environment of today. The school will provide the students opportunities to earn industry certifications while in middle and high school.

The school's academic program is organized around two central components essential to promoting its mission—a strong academic foundation defined by its core courses and their full integration of skills learning in addition to academic content, paired with the Pathways curriculum in interest-development, the foundations of professionalism, and financial literacy that gives students an early and scaffolded preparation for career. From this perspective, Pathways is about the learning that leads away from the school into the world or that pulls elements from the world into the school, whereas the core learning skills represent capabilities that will be of value to students and their communities independent of where they find themselves in professional life. These two components are the framework within which the Iowa standards are implemented in the academic program.

Opportunity Education's Pathways Program brings opportunities for students to explore the worlds of service and work through work-based learning. The Pathways course sequence and supporting skills advance a posture of service leadership that structures students' learning about leading and working with others in a range of settings in and outside of school. Accommodation and support for service learning, internships, and dual enrollment at local colleges are also an important part of Pathways' role of orienting, preparing, and engaging students for and in opportunities outside of the walls of the school. Unlike many high school-based college and career counseling programs, Pathways is focused on long-term student success not just *getting into* college or a career, but on persistence and flourishing within it.

One other element of the proposed charter school that deserves mention is the focus on digital creativity. The world our students will live in will be increasingly digital. Students need to learn how to avoid digital consumerism and instead master the tools for creating in the digital economy. This includes elements as diverse as product design and innovation, media production, social media management, and the effective use of advanced digital tools such as AIs and LLMs. Elements of digital creativity will find expression in projects and lessons throughout the curriculum, in arts courses, and even in the financial literacy curriculum. In addition, career-relevant skills and competencies related to telling one's story and communicating objectives and qualifications through digital means will be a focus of Pathways lessons.

Through the collaboration between Academica and Opportunity Education, the school has the personnel and expertise to be successful. Academica is one of the nation's longest-serving and most successful education organizations. Academica works with over 180 academically successful and fiscally sound charter schools. Academica also serves the largest number of high-performing schools of any charter school service and support organization in the United States. Founded in 1999, Academica supported one of the first charter schools in Florida and was also the first company in the state to seek AdvancED accreditation for the schools it serves. All Academica-supported schools are either fully accredited or in the process of obtaining accreditation.

With central headquarters in Miami, Florida, Academica has local offices throughout the country. Academica works with communities and charter school entities to provide educational programs from pre-kindergarten through high school students. Academica has celebrated over 20 years of success serving charter schools in Florida, Arizona, Georgia, California, Colorado, Idaho, South Carolina, North Carolina, Nevada, Texas, Wyoming and Utah.

The school looks forward to providing Iowa a strong STEAM focused school which provides students with a technologically advanced program made for the 21st century and beyond which aids and provides tools to students in finding their path for a successful future.

2. Proposed Vision and Mission

2.1. Describe the vision of the proposed charter school.

Describe the overall purpose and intention of the proposed charter school.

Vision

A school where each student is challenged to take ownership of their lives and education as they learn to fully harness all resources available. A school that is not a walled garden but a launching pad propelling students into outside learning opportunities such as dual enrollment, internships, and career technical education. A school that prepares each student to succeed in a path of their choosing and to continue learning, adapting, and contributing in a dynamic and personally fulfilling future. A school that produces capable citizens, who are active members of, and participants in, their community and country.

Core Values

The school is built on five research-based guiding principles:

1. Learning Requires Action

We believe that to learn, we must be active and engaged, driving the process of discovery, the process of building understanding, and the practice of skills. We learn by asking questions about the world and seeking answers, by testing potential solutions to problems, by making things, and by iterative trial and error. Being a mere observer does not lead to capability; only active engagement with people and the world around us does.

2. Learning Improves with Practice

While knowledge can accumulate through discovery, skill-building requires dedicated, persevering practice. As lifelong learners, we identify skills we can improve, and then practice them over days, months, and years to refine and advance the impact and outcomes of our work.

3. We Learn Better Together

It is impossible to gain skills and real insights without connecting to and receiving feedback from others. Peers, mentors, family members, and subject-matter experts all drive learning and personal growth. Collaborating with others inspires creativity and innovative thinking. Similarly, sharing our discoveries and successes is an important impetus for learning.

4. Learning Happens Everywhere, Always

This is evident from watching small children — they learn constantly, wherever they go, and without formal instruction, classrooms, or learning materials. This pattern holds for all ages. As a school we recognize as essential the learning that occurs outside of the classroom and that is inherent in every experience.

5. Learning Drives Personal Growth

Learning is not a passive, receptive process that leaves the learner unchanged. It is a personal process that changes how we understand ourselves, the world around us, and our place in it. Quest Forward Learning broadens our understanding of the world, the skills we need to work in our communities and beyond, our sense of identity, and our ability to solve a variety of challenges. As we grow personally, we begin to define ourselves as lifelong learners, able to embrace and master new challenges and opportunities with curiosity, creativity, and determination.

2.2. Describe the mission for the proposed charter school and identify the targeted student population(s) and community(ies) the proposed charter school intends to serve.

Describe the mission and objectives of the charter school, including the targeted student population(s) and community(ies) to be served.

Mission

Through an active, engaged, skills-forward education, Quest Forward Charter School develops motivated, driven individuals, fully invested in their education and capable of charting their own pathway through college, career, and life.

These strategies, alongside tools and support for teachers and an array of career-development and advanced coursework options, situate the school to meet the needs of all students in a diverse community.

Learner Outcomes

Quest Forward Charter School students build essential understandings while developing the skills and habits they need in order to succeed in life and career. These include:

Learning Skills

Consistent with the priority of empowering students to learn, Quest Forward Charter School students learn to explore, innovate, reason, and communicate. They do this in a contextualized manner, learning not just facts about the world, but facts about their world; they not only learn how to learn, they learn how to take maximum advantage of the resources available in their world to support their learning. In contextualizing their learning, they engage in service projects and internships in their community.

Work Skills and Pathway to Career

Learning how to work effectively, independent of an academic subject, is vital if students are to succeed in the next chapter of their lives. Quest Forward Charter School graduates demonstrate skills central to long-term success: they focus, plan, engage, and document.

In addition to practicing these skills, graduates have laid the foundations for their careers by developing professionalism, financial literacy, and knowledge of their interests and potential careers.

Essential Habits

Essential Habits focus on an individual's thoughts, beliefs, attitudes, emotions, and how one interacts with others. The Essential Habits include: practice curiosity, define yourself, communicate openly, leverage resources, and learn from setbacks. Openness and conscientiousness, which are captured by these habits, have long been shown to correlate highly with academic success.

Essential Understandings

Through active engagement with their learning students gain argumentation and problem-solving skills while building essential understandings—the domain-specific knowledge needed to practice skills in the world.

3. Proposed Location

3.1. What is the address (Street Address, City, Zip Code) of the proposed charter school? Or, if not yet identified, describe the proposed geographic area within the state where the charter school is proposed to be located.

The school plans on opening a facility within the Cedar Rapids Area, and we are currently evaluating both existing school buildings and properties for building new school buildings.

Cedar Rapids Community School District currently serves 14,870 students in 31 schools. In order to understand the school's targeted population more in depth, the school has examined student ethnicity demographics from Cedar Rapids Community School District. We anticipate the actual student body will reflect these findings once the school opens. Data from public schools within our targeted population was obtained through the IA School Performance¹. Results were then averaged together to produce the findings shown below:

Demographics						
White	African American	Hispanic	Asian	Hawaiian/ Pacific Islander	Native American	Multi-Racial
59.9%	19.2%	8.3%	2.0%	0.6%	0.2%	10.7%

We also anticipate that approximately 15.3% of our students will be eligible to receive special education while 7.7% will be English Learners (EL). Furthermore, we expect that roughly 57.5% of our students will qualify for Free/Reduced Lunch (FRL) services.

Quest Forward Charter School - Cedar Rapids looks forward to serving the students and parents of Cedar Rapids and the surrounding area with a state-of-the-art facility. The facility will have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed facility will include program elements such as traditional classrooms, art, science and computer labs, multimedia instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

¹ <https://www.iaschoolperformance.gov/ECP/StateDistrictSchool/DistrictSummary?k=8265&y=2022>

4. Proposed Grade Levels and Enrollment

4.1. Select each grade level that would be served during the five-year duration of the charter school contract by placing a mark in the first column below (Check all that apply). For each grade level selected, indicate the minimum, planned, and maximum enrollment for each year of the charter school contract.

✓	Grade	Year 1	Year 2	Year 3	Year 4	Year 5
	K	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:
	1	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:

√	Grade	Year 1	Year 2	Year 3	Year 4	Year 5
	2	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:
	3	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:
	4	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:
	5	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:	Min: Planned: Max:
√	6	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	7	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	8	Min: 0 Planned: 0 Max: 0	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	9	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	10	Min: 0 Planned: 0 Max: 0	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	11	Min: 0 Planned: 0 Max: 0	Min: 0 Planned: 0 Max: 0	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125
√	12	Min: 0 Planned: 0 Max: 0	Min: 0 Planned: 0 Max: 0	Min: 0 Planned: 0 Max: 0	Min: 40 Planned: 100 Max: 125	Min: 40 Planned: 100 Max: 125

5. Evidence of Need and Community Support

5.1 and 5.2 should address how the independent founding group gathered, engaged, and assessed the community's need and support for the proposed school. Evidence may include survey results, minutes from community meetings, summarized public comments, or any other documentation of community need and support for the proposed charter school.

5.1. Describe the evidence supporting the need for the proposed charter school.

At present, Cedar Rapids Community School District and surrounding area does not offer any school choice options for families. Quest Forward Charter School pledges to deliver a comprehensive education, preparing students for a broad range of college options and future professions alike. From middle school through high school, students will develop learning skills, work skills, and essential habits that will bolster domain specific knowledge and enable them to succeed in the global environment of today. The school will provide the students opportunities to earn industry certifications while in middle and high school. The school will also offer families a one-stop shop for middle and high school students, which is currently not offered at any other location in the area.

In the 2022 school year, out of the 10 combined middle and high schools in the Cedar Rapids Community School District, there were only three schools rated as Commendable; the other seven schools were rated as Acceptable, Needs Improvement, or Priority.

Quest Forward Charter School Cedar Rapids will serve the students and families in the Cedar Rapids area by delivering a comprehensive education and preparing students for a broad range of college options and future professions alike. From middle school through high school, students will develop learning skills, work skills, and essential habits that will bolster domain-specific knowledge and enable them to succeed in the global environment of today. The school will provide the students with opportunities to earn industry certifications while in middle and high school.

The school's academic program is organized around two central components essential to promoting its mission—a strong academic foundation defined by its core courses and their full integration of skills learning in addition to academic content, paired with the Pathways curriculum in interest-development, the foundations of professionalism, and financial literacy that gives students an early and scaffolded preparation for career. Unlike many high school-based college and career counseling programs, Pathways is focused on long-term student success not just *getting into* college or a career, but on persistence and flourishing within it.

Quest Forward Charter School Cedar Rapids will also address a recent and increasingly urgent problem, namely preparing our students to thrive in a world that will be increasingly digital. Students need to learn how to avoid digital consumerism and instead master the tools for creating in the digital economy. This includes elements as diverse as product design and innovation, media production, social media management, and the effective use of advanced digital tools such as AIs and LLMs. Elements of digital creativity will find expression in projects and lessons throughout the curriculum, in arts courses, and even in the financial literacy curriculum. In addition, career-relevant skills and competencies related to telling one's story and communicating objectives and qualifications through digital means will be a focus of Pathways lessons.

5.2. Describe the evidence of community support for the proposed charter school.

The proposed charter school will provide community support by aligning closely with the specific local needs, receiving substantial backing from key stakeholders such as the Chamber of Commerce, local parent groups and more. The school plans on offering the potential to make a positive impact on Cedar Rapids' agricultural, manufacturing, bioscience, and education technology sectors through active community engagement. This alignment and support will not only improve the school's chances of success but also guarantee its sustained excellence, fostering a significant and positive presence within the community.

Included in the proposal is a letter of support from Mike Huguelet, the Executive Director of the Iowa Coalition for Public Charter Schools.

5.3. Optional attachment(s) to support 5.1 and 5.2. Please add any additional information or documents to [Appendix A](#)

6. Independent Founding Group and Governing Board Background Information

Independent Founding Group Members

"Founding group" means a person, group of persons, or education service provider that develops and submits an application for a charter school to the state board" [Iowa Code § 256E.2(5)].

6.1. Enter the names of the independent founding group members.

Opportunity Education: Manuel Mattke, Ray Ravaglia, and Joe Ricketts

6.2. Attach the curriculum vitae (CV) or résumé for each founding member to [Appendix B](#).

Proposed Governing Board Members

"Governing board" means the independent board of a charter school whose members are elected or selected pursuant to the charter school contract" [Iowa Code § 256E.2(6)].

6.3. Enter the names of the proposed governing board members. If not yet known, enter the date when they will be available.

The governing board has not yet been determined. The governing board will be known at the time to execute the charter contract.

6.4. Attach the CV or résumé for each governing board member to [Appendix C](#).

Proposed Charter School Administration

6.5. Indicate the names of the proposed charter school administration and each individual's role.

Add rows as necessary.

Proposed Administrator Full Name	Role
Mike Brown	Superintendent

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Attach the CV or résumé for each administrator to [Appendix D](#).

7. Proposed Calendar and Daily Schedule

7.1. Attach a copy of the proposed charter school's calendar that includes:

- School year and semester start and end dates,
- Holidays and other no-school days, and
- Professional learning days.

7.2. Attach a sample of the proposed charter school's daily schedule for one week that includes:

- Daily start and end times,
- Class period or content block start and end times, and
- Name of classes or content to be covered.
- If the proposed charter school wishes to offer grades nine through 12, attach a master schedule and course catalog.

7.3. Add attachments to [Appendix E](#).

8. Proposed Academic Program

8.1. Describe the proposed charter school's academic program and identify how the program aligns with state academic standards.

The school's academic program is organized around two central components essential to promoting its mission—a strong academic foundation defined by its core courses and their full integration of skills learning, including digital creativity, in addition to academic content, paired with the Pathways curriculum in interest-development, the foundations of professionalism, financial literacy, and service leadership that gives students an early and scaffolded preparation for career. From this perspective, Pathways is about the learning that leads away from the school into the world or that pulls elements from the world into the school, whereas the core learning skills represent capabilities that will be of value to students and their communities independent of where they find themselves in professional life. These two components are the framework within which the Iowa standards are implemented in the academic program.

Strong Academic Foundation

The school approaches the core academic side of its mission of preparing students to chart their own pathway in college, career, and life with a research-based focus on fostering the development of the skills, habits of mind, and ways of thinking that will enable learners to realize their potential so they can pursue their individual goals. In contrast to a traditional content-centric model of education, the school's "skills-forward" approach to curriculum, instruction, and assessment recognizes that readiness for the dynamic future of work depends on the acquisition of flexible skills that in turn serve as building blocks or tools for future learning. By learning to use and develop these skills, students also come to demonstrate leadership, think critically, and take initiative.

A skills-forward academic program is one which clearly articulates the skills to be acquired, scaffolds their development across the stages of students' academic progress, and thoroughly integrates these phases of skill development into courses and lessons, supported by teacher feedback similarly geared toward skills. This is the approach that the school will take to building academic courses around the Iowa Core Standards. As we discuss below (section 9.1), courses will be built in alignment with the standards, carefully unfolding the grade-level development of the relevant skill-bodies (e.g. Iowa Core Standards for Mathematical Practice, NGSS Science and Engineering Practices, C3 Framework and Iowa Social Science Inquiry Anchor Standards, 21st Century Skills, and the Iowa Universal Constructs) in the context of appropriate content standards. To these “learning skills,” we join the “work skills” and “essential habits” that underlie academic and professional success.

Digital Creativity

An important skill for students to master is that of digital creativity. The world our students will live in will be increasingly digital. They need to learn how to avoid digital consumerism and instead master the tools of the digital economy. This includes elements as diverse as product design and innovation, media production, social media management, and the effective use of advanced digital tools such as AIs and LLMs. Elements of digital creativity will find expression in projects and lessons throughout the curriculum, in arts courses, and even in the financial literacy curriculum. In addition, career-relevant skills and competencies related to telling one's story and communicating objectives and qualifications through digital means will be a focus of career education.

Career and Professionalism Development

A second set of courses, principles, and points of emphasis in the academic program is collected under the school's Pathways Program. Animated by a sequence of courses at the high-school level and its own distinctive skills, habits, and perspectives, Pathways is not a simple supplement to the curriculum, but constitutes an area of study and learning central to the school's mission. The Pathways course sequence and supporting skills advance a posture of service leadership that structures students' learning about leading and working with others in a range of settings in and outside of school. Accommodation and support for service learning, internships, and dual enrollment at local colleges are also an important part of Pathways' role of orienting, preparing, and engaging students for and in opportunities outside of the walls of the school.

Pathways

Many students are unprepared for life after high school. Some embark on a path that isn't the best fit for them. Others struggle to make wise and informed choices about their future, many of which are life-changing, like which college to attend. This results in a wide range of consequences: dropping out of college, taking on high debt for low-value degrees, descending into low self-esteem, and more. Part of the challenge is that most young adults know little about possible life and career paths, and how their personal passions and interests (to the extent those are articulated) relate to such paths. Typically, support for high school students comes in the form of college counseling late in 11th grade and early 12th grade, and then only in small amounts. This isn't enough. Students need more.

Unlike many high school-based college and career counseling programs, Pathways is focused on long-term student success not just *getting into* college or a career, but on persistence and flourishing within it. The program's design reflects this critical additional aim of college and career counseling. Pathways elements are, for instance, offered much more often than standard programs—including in the form of standalone courses—and students participate in the program across their entire four years in high school, enabling them to engage deeply and build a solid foundation for life after graduation. Students gain knowledge from local professionals and develop valuable skills through workshops and career exploration activities aligned with their goals, such as internships.

By the time they graduate, students will have developed their strengths and professional skills and identified plans to pursue a clear pathway from four options: college, career education, military, or a job with training opportunities. They will also have achieved competency in the three core areas of the Pathways Program and in five Essential Habits.

1. Interest and Career Exploration

What am I interested in and what kind of work do I want to do?

Students identify their strengths, explore their values, learn about the economy and professions, and explore opportunities that might be well suited to their interests and strengths. For example, students complete career and interest assessments, job shadow and intern, and meet professionals from various fields.

2. Foundations of Professionalism

How can I succeed in the workplace?

Students practice workplace skills (e.g. appropriate dress, timeliness), clearly present and communicate information, develop their resumes and LinkedIn profiles, and learn how to effectively work with colleagues.

3. Personal Finance

What financial resources do I need for my path beyond high school?

How can I succeed financially long-term? Students gain confidence, skills, and knowledge to manage their personal finances and pursue the path of their choice. They set financial goals for themselves and understand available financial resources.

Throughout the program, students also have the opportunity to develop five Essential Habits which are key to excelling in education and career, but also in relationships and every other aspect of life.

1. Practice Curiosity

Students step out of their comfort zones and try new things.

2. Define Yourself

Students get to know who they are by identifying interests, dislikes, strengths, and weaknesses and they commit to becoming their best selves.

3. Communicate Openly

Students learn to communicate with others by listening actively, considering others' perspectives, sharing ideas, and calmly expressing concerns to solve problems.

4. Leverage Resources. Students identify resources available to them and leverage those resources to achieve goals.

5. Learn from Setbacks

Students demonstrate flexibility, try different approaches when something is not going the way they want or expect it to, determine when and how to adapt, and adapt (or move on when appropriate).

Students practice these habits through Pathways courses, activities, workshops, and career experiences.

Other critical aspects of Pathways' career orientation within the academic program are service leadership and the dual enrollment program:

- **Service Leadership.** Students need to understand their own strengths and the best way to accomplish this is through understanding the needs of others. Students will learn through practice and a service-oriented problem-solving approach the specific dimensions of effective leadership. Most importantly they will learn that effective leadership requires developing empathy and an ability to help people achieve common goals through mutual action rather than through force or intimidation. These skills and objectives are integrated into Pathways offerings as well as throughout the core academic program. Key aspects of their articulation are discussed in section 9.1.
- **Dual Enrollment.** Consistent with our priorities of interest exploration, engaging students in the community and its resources, and opportunity for rigor and challenge, dual enrollment arrangements with

local colleges will allow students to pursue academic and career interests beyond what is possible at the school alone. Students will be strongly encouraged to take several such courses in the last two years of their time at the high school. We will support this approach through the Pathways umbrella in order to ensure that students are well positioned to choose courses that connect with their interest and career exploration, as well as their preparation. Ongoing counseling will provide additional scaffolding and support to students in these early experiences with college-level material and expectations.

Course Offerings and Graduation Requirements

The school will adhere to Iowa and local district requirements regarding course offerings at the middle-school and high-school level, along with graduation requirements for high-school students. In addition, several graduation requirements reflect elements of the school's distinctive academic program discussed above.

In order to graduate, students must complete 22 course units, including:

English Language Arts - 4 units

Mathematics - 3 units

Science - 3 units

Social Studies - 3 units, including 1 unit of United States history and .5 units of United States Government

Physical Education - 1 unit

Financial Literacy - .5 units

Service learning and Internships - .5 units (60 hours) of internship and/or service learning

Pathways - .5 units

Electives - 6.5 units, which may include world languages, health, fine arts, and other courses

High School Course Offerings

Content	Graduation Requirement	Courses Offered and Taught
English Language Arts	4 units	<ul style="list-style-type: none"> ● Foundations of English (1 unit) ● Intermediate English (1 unit) ● American Literature (1 unit) ● Communications and Media (1 unit) ● Great Books: From Greece to the Renaissance (1 unit) ● Great Books: World Literature (1 unit)
Social Studies	3 units (1 US, .5 government)	<ul style="list-style-type: none"> ● World History (1 unit) ● US History: Freedom and Conflict (1 unit) ● American Government (.5 units) ● Economics (.5 units) ● Great Books: Political History (1 unit) ● Great Books: The American Founding (1 unit)

Mathematics	3 units	<ul style="list-style-type: none"> ● Pre Algebra (1 unit) ● Integrated Math 1 (1 unit) ● Integrated Math 2 (1 unit) ● Integrated Math 3 (1 unit) ● Precalculus (1 unit) ● Calculus (1 unit) ● Great Books: History of Mathematics (.5 units)
Science	3 units	<ul style="list-style-type: none"> ● Environmental Science (1 unit) ● Biology (1 unit) ● Chemistry (1 unit) ● Physics (1 unit) ● Advanced Research Seminar (1 unit) ● Great Books: History of Science (.5 units)
Health	Local district decision	<ul style="list-style-type: none"> ● Health (1 unit)
PE	1/8 unit each HS semester, unless district waiver; ROTC or page program	<ul style="list-style-type: none"> ● Physical Education (1/4 units) ● ROTC (external) ● Legislative page program (external)
Fine Arts	Local district decision	<ul style="list-style-type: none"> ● Introduction to Art (1 unit) ● Theater (1 unit) ● Digital Essentials (1 unit)
World Language	Local district decision	<ul style="list-style-type: none"> ● Spanish 1 (1 unit) ● Spanish 2 (1 unit) ● Spanish 3 (1 unit) ● Spanish 4 (1 unit)
Computer Science	Local district decision	<ul style="list-style-type: none"> ● Understanding and Using AI (.5 units)
CPR	Must complete CPR certification course	<ul style="list-style-type: none"> ● CPR certification course (external)
Financial Literacy	.5 units	<ul style="list-style-type: none"> ● Financial Decision Making (.5 units)
Vocational Education	1, including .5 units of service learning or internship and .5 units of Pathways	<ul style="list-style-type: none"> ● Pathways Course (.5 units) ● Service Learning ● Internships
Electives or Additional Courses	6.5 units	Electives include courses beyond requirements in the core curricular areas, computer science, language courses, and courses at local colleges through dual enrollment options.

9. Proposed Instructional Model

9.1. Describe the proposed charter school's instructional model that includes:

- **Type of learning environment,**
- **Class size and structure,**
- **Curriculum overview, and**
- **Teaching methods.**

An instructional model is a framework for the proposed instructional design that aligns with the needs of the charter school's prospective student population(s). The description should address all of the following:

- Learning environment is the way instruction will be provided (e.g., face-to-face classroom-based, independent study, online).
- Class size and structure includes the maximum class size, the teacher-to-student ratio, grades served in a particular classroom, etc.
- Curriculum overview includes how teachers will teach the standards, including the particular curriculum (e.g., lessons, instructional materials, teaching techniques, activities).
- Teaching methods include the methods and systems that teachers will use to provide differentiated instruction, remediation, and intervention to meet the needs of all students.

The school's instructional model focuses on teachers engaging students with active learning. This effort requires equipping teachers with resources, interactive teaching tools, and strategies. The goal of these tools and strategies is to help teachers generate student interest and excitement about what they're learning, facilitate student participation and ownership of their learning, and provide frequent formative feedback. These priorities inform the teaching methodologies, structure of the curriculum, and the nature of the learning environment.

Methods

The school's methodology for meeting the needs of all students is rooted in research on, and Opportunity Education's success with, using active learning to engage students in learning. Active learning is an instructional approach where students actively engage in their learning intellectually, socially, and physically. The approach puts more responsibility on students compared to other more passive instructional approaches such as lecturing. In active learning models, teachers play a key role in active learning—facilitating, guiding, and helping each student grow. Students learn by investigating and solving problems, reflecting, discussing and debating with peers, collaborating, and creating products and solutions.

Decades of research on active learning have produced a long list of positive outcomes. These benefits include:

- Increased motivation, interest, and creativity
- Increased resilience due to stronger peer relationships
- Improved student attitude and self-esteem
- Improved performance and retention, particularly for students from underrepresented groups
- Increased level of perceived control in their learning.

Teachers will use a range of pedagogical techniques to promote these outcomes through active learning, with aligned support from the curriculum, technology, and student support systems.

1. *Active Learning through Curriculum and Lesson Design*

The most direct route for teachers to promote active learning is through the design or selection of curriculum and lessons to incorporate active learning activities. Supported by research and professional learning resources from Opportunity Education, the school will pursue principles of guided student choice and relevance in curriculum and lesson design to address active learning in addition to other curricular goals.

One core approach consistent with these principles is project based learning (PBL). As planned and adapted at the school, PBL frames learning objectives within the formulation of a problem, curated resources, and scaffolded discovery. Teachers can make use of the Quest Forward curriculum library, which supports project-based design, to access and modify existing digital lessons in this style. Or they can follow similar principles in the group-classroom setting or outside the classroom and in the community. Other active learning techniques include group social activities like discussions, debates, workshops and peer feedback; intellectual activities like concept mapping and creation of work products or presentations; and physical activities like design challenges, games, and lab experiments. All of these activities can be designed to offer students choices in how they pursue the task and learning objectives (especially when these are specified around skills and carefully considered content requirements). These choices, as well as the social and physical nature of the activities, support perceived relevance.

Strategies such as these for introducing active learning into lesson planning and design naturally make significant room for differentiation and other measures to meet the needs of all students. PBL, in particular, allows for the inclusion of leveled resources, which the Quest Forward curriculum library richly supports. Teachers, meanwhile, will routinely work with students in goal-setting sessions and other contexts to discuss collaboratively appropriate choices of available activities, resources, and topics to address individual needs. Opportunity Education Professional Learning resources also offer techniques, trainings, tools, and templates for differentiation in lesson planning.

2. Active Learning through a Skills-Forward Focus

As discussed above (section 8.1), the school follows a growing body of research, the Iowa Core and other national standards frameworks, and the experiences of Opportunity Education in privileging skills among its learner outcomes. This effort is not just nominal, but pervades daily school practices envisioned at the school in support of both active learning and differentiation. Skills engage students in learning first by rendering traditional learning objectives in terms of relevant and concrete skills broadly applicable to students' goals. Once cast in these accessible terms, skills support active learning by enabling dialogue between students, teachers, and their peers about progress toward these goals (see below for broader discussion of feedback and active learning). Teachers at Quest Forward Charter School will incorporate skills into their classrooms by linking them regularly to the day's lessons—for example, by announcing a skill focus for the day—by intentionally designing curriculum to address the skills, and by offering students regular feedback on their skills development. This guidance and goal setting, along with accompanying feedback (discussed below), is individualized and automatically tracked in the Feedback Forward assessment system to support growth for every student. (Feedback Forward is a browser extension developed by Opportunity Education as a flexible and streamlined tool for teachers to use in providing and tracking frequent formative feedback on student work.)

3. Active Learning through Effective Feedback

What we want assessment to look like

One way to foster student engagement through active learning is by establishing effective feedback loops between students and teachers. Effective feedback requires both teachers and students to actively participate in the feedback process, not just as receivers of feedback and information, but as contributors who work together and each own aspects of the process. The outcome of this work together is feedback that helps both the student and the teacher move forward—by taking actions to improve skills and practices, work products, instruction, or lesson plans.

Feedback is much more than the information teachers give students about their work, skills, knowledge, and learning. Rather, feedback is part of an iterative and responsive process where students can learn and develop skills and mindsets—they reflect; evaluate their work, understanding, and skills; communicate with peers and teachers; and practice a growth mindset. The feedback cycle, when implemented effectively, is an active learning experience in its own right, as students practice and develop skills they will use the rest of their lives.

When implemented effectively, feedback can increase student performance. For low-performing students, feedback can increase achievement as well as students' motivation to learn. As discussed elsewhere, it is our policy to use summative assessments—concluding demonstrations or inventories of what students have learned—sparingly and judiciously. Such exams are given mainly in connection with statewide or national standardized exams and are used both for reporting and to validate our internal, formatively-focused assessments. This is because outside their essential role in depicting student progress, these exams do not do much to contribute to that learning process. And, not coincidentally, these exams are not rich in active learning in the sense we promote—the exams are broadly something done to students or that students undergo, rather than something the students are doing and directing themselves. At Quest Forward Charter School, we prioritize instead a robust, daily, and interactive system of formative assessments focused on helping students discover answers to the central questions of “Where do I go next?” and “How do I get there?”

How we implement effective feedback and assessment to support all students

To advance these principles in assessment, the school will employ feedback practices and supporting technology developed by Opportunity Education, and particularly its Feedback Forward application. These methods and the assessment system support feedback that is frequent and timely, focused on growth in school and course goals, collaborative, and individualized, enabling efficient feedback that can surface and help address individual needs and trends.

A key feature of this approach to feedback is that it reflects meaningful goals directed at both standards and patterns of active learning. First, teachers offer students multiple points of feedback each day on foundational aspects of learning like engagement in class. In addition to these ongoing baseline measures, teachers assess student contributions on concrete activities with respect not only to relevant content standards, but to skills like the Iowa Core mathematical practices or 21st Century Skills. These quick assessments can also include indicators of performance on work skills. Having a streamlined tool to use in making and tracking these measures enables teachers to maintain the practice while spending more time connecting with students.

Just as important as the assessments themselves are the practices surrounding them. The frequency of these assessments and a formative focus on growth and improvement diminish the stakes of individual assessments. This enables moments of assessment to serve as catalysts for dialogue between students and teachers regarding growth, whether in written or recorded asynchronous comments, in quick exchanges as teachers circulate in class, or in individual meetings where students and teachers discuss growth in skills and other areas. In support of these conversations, the assessment system tracks individual trajectories for each skill or other indicator of student work and engagement. These displays enable students to reflect on their growth, celebrating the progress resulting from their efforts, and thinking constructively about where they can focus to address needed areas of improvement. This kind of reflection is a critical component of active learning.

In addition to its ongoing use by students and teachers, the assessment system also works proactively to surface trends at the individual level, in classes and subject areas, and across the school. For instance, it will highlight and alert a teacher when a student has shown an uncharacteristic decline in engagement (in a class or across courses) of the sort that might indicate detachment from coursework and be an appropriate occasion for a conversation. Or more routinely, it might enable a teacher to identify an area where a student's growth has plateaued or is

below their proficiency in other skills or content learning. Outside of individual classrooms, dashboards and analysis allow the appropriate groups—teachers, counselors, or school leadership—to identify those who need extra attention, consider the nature of the needed intervention, and to monitor the effectiveness of these interventions. This additional information and analysis supports and strengthens teachers’ and administrators’ usual practices of attending to student needs and performance, providing them tools to make systematic observations, accommodations, or interventions for all individual students and to address school needs program wide. A significant advantage of this type of forward-looking predictive analysis and intervention is that it allows one to identify and address problems before they appear on high stakes end-of-year examinations.

Learning Environment

Standard Classroom Setting

Instruction will take place primarily in a traditional classroom environment with face-to-face instruction, feedback, and guidance by teachers, consistent with the Iowa State Board of Education’s requirements for hours of instruction. The classroom setting is structured to support the school’s emphasis on active learning and its strategies for promoting it. This means that classrooms are not centered around a ‘stage’ from which teachers deliver lectures, but are configured instead for active student exploration in activities like project-based learning featuring significant student collaboration, performing scientific experiments, and conducting Socratic seminars and discussions. Physical and technological infrastructure will also support this style of learning. Flexible and moveable furniture will accommodate group work in different settings, as well as individual private work and whole-class activities. The Quest Forward curriculum library and Feedback Forward tool are available to teachers and students to facilitate both the feedback and student-driven exploration that are characteristic of active learning. These technologies and other learning materials enable students to do research, examine digital and traditional materials, and create a wide range of work products independently and in groups. In this setting, teachers are able to provide feedback and guidance to students both digitally and in individual and small-group interactions during class. Digital technologies are designed and intended for use at the school as supports and facilitators of collaborative and social learning between teachers and students and among students; they are not used to replace or automate valued traditional classroom interactions.

Additional Settings for Learning

The school schedule and academic program provide for additional instructional, collaborative, or individualized settings. The school schedule provides for a managed venue in which students can make progress on work, connect with teachers, or collaborate on group projects. The student support system enables teachers to arrange for particular students to meet with them during this time, or to engage in specific class-related activities or programs.

Vocational learning may occur in a classroom setting, as in the routine elements of the Pathways course, or in a range of other environments. Students will be required to complete a range of internship and/or service learning programs during their time at the school. Internships for high-school students may occur off campus at a business or non-profit location.

In addition, the school will pursue a “City as Campus” co-curricular focus in which students are encouraged and supported in exploring and taking advantage of civic and cultural resources throughout the city. This approach includes research and learning activities at performances, events, and city institutions. Such opportunities may occur in connection with class projects or units, or as more general events available to larger groups of students.

More traditional classroom learning will also occur for older students through dual-enrollment options available through arrangements with local community colleges and four-year colleges. Similarly, career and technical education will be available off-campus at local community colleges and in other settings.

Class size and structure

Class sizes and structures are envisioned as appropriate to support the school's vision of active and engaged learning, within the parameters of public funding. Accordingly, class sizes need to involve teacher-student ratios that allow for meaningful feedback and individualized attention, as well as for active participation by all students. As shown in the ramp-up plan (section 4.1), our projected school growth trajectories translate into standard class sizes from 25-30 students. The Quest Forward curriculum library and Feedback Forward technologies help teachers provide this level of attention more efficiently and for more students than is otherwise possible. They streamline assessment processes, facilitate frequent communication with students, and detect likely needs for intervention. In addition, they can be optionally used to provide supplemental and differentiated materials for advanced students or students who need additional support.

Curriculum overview

The Quest Forward Charter School curriculum will be designed to support the teaching and learning methodologies discussed above. Curriculum will need to be conducive to active learning and relevance, project-based and inquiry-based learning, and frequent feedback around clearly articulated learning objectives. These aspects of the methodology in turn prescribe certain features and principles of the curriculum itself, including the nature of course- and lesson-design as well as alignment to standards.

The school's curriculum will align thoroughly with Iowa Core standards, including both content standards and skills or practices. Structural aspects of the alignment will be discussed below, while particular details of the standards aligned to particular lessons within these broader parameters will be determined as the curriculum is built. This initial teacher-led design of the new curriculum will be supported by Opportunity Education's professional learning group, which offers training sessions for newer teachers and various courses in active learning and related principles central to the school's methodology. In addition, the group has developed a collection of tools and recommendations to support course and lesson design, including strategies like backwards design. Teachers will also have supplementary access to curriculum built by Opportunity Education and currently used by Quest Forward High Schools in California and Nebraska. This existing curriculum is built according to active-learning principles and a skills-forward approach, and is rich in project-based opportunities that can be used in lesson-sized units to aid teachers in differentiation or meeting a particular curricular goal. These lessons are aligned individually to Common Core, NGSS, and the C3 Framework, making them relatively easy to align to the Iowa Core as needed. They are also aligned to the Florida BEST and Sunshine State standards. As discussed in section 10.1, student progress toward the content and skill standards will be assessed through ISASP exams in relevant subjects and through frequent feedback supported by Opportunity Education technologies.

In addition to these aspects of the curriculum as a whole, curriculum within the core subject areas has the following more particular features.

Great Books Program

Through an arrangement with New College Florida, the school will offer interested students a unique sequence in great texts and ideas, adapted specifically for high-school students. This interdisciplinary sequence comprises course offerings across the four core disciplines, with two year-long courses in both English Language Arts and Social Studies. In addition, semester-long courses treat the development of mathematics and the history of science. These courses will focus on curated readings of historical primary texts and supporting documentaries and other materials. Students will engage these works and ideas through participation-based discussion seminars and regular writing. These courses will have an honors designation similar to Advanced Placement courses.

Students completing at least three units of the sequence will receive a Great Books designation on their transcripts. The place of the individual courses in the core curriculum is described below; the courses themselves are described in the sample course catalog.

English Language Arts

The English curriculum engages students in asking and exploring topics both enduring and relevant through intensive reading from a variety of genres and sources, as well as in writing in different forms, for different purposes, and with different intents, with a focus on argumentation. The first two courses in the sequence follow these parameters in level- and theme-appropriate texts. The third course in the standard sequence narrows the focus to American literature and other writing, attending to characteristics of historical periods and examining developments in themes like freedom across those periods. Alternatively, at this juncture students can choose to take one of the two Great Books courses in literature—Greece to the Renaissance, or World Literature. For a final course, some seniors will select the other Great Books course for continued advanced study in literature in preparation for relevant college courses. Others will choose to focus more directly on creating and consuming communication in personal and public lives as citizens and professionals. This course on Communications and Media helps students develop skills in the practical and professional communication they will exercise in their careers, while also cultivating critical thinking about media and more generally.

In addition to addressing the English standards, the English curriculum is a critical center of the school's work in development not only of literacy and writing skills, but also of the more global elements of the Iowa standards, including the Universal Constructs and 21st Century Skills. Some of the strategies and activities for meeting these content and skill standards include:

- Variety of reading: Students read widely with common texts and some student-chosen texts, using independent reading strategies as appropriate. Across these texts, they work on skills like identifying themes, perspective and motive, and genre characteristics.
- Variety of writing: Students engage in a wide range of writing, with tasks scaffolded in complexity. Types of writing include summarizing, personal narratives in which students explore core beliefs, research papers and shorter documents, persuasive essays in which students use a variety of techniques to advance their position, analytical and argumentative essays in which students defend and support a critical position, creative writing, and different types of communications, among others. Students study, explore, and deploy strategies of composition including sentence and paragraph construction; they attend to diction and tone; and they revise for criteria like readability, clarity, and accuracy.
- Socratic seminars and in-class debates: Students practice organized and respectful debates on different topics. These discussions give students a chance to practice skills of listening and responding to others' contributions, defending a position whether assigned or chosen, and using evidence to support those positions (including in a Claim-Evidence-Reasoning style).
- Critical analysis: Students learn to develop and share a critical analysis of arguments, media, and rhetoric, including through the lens of theory at the higher levels of the curriculum.
- Oral and professional presentation: Students frequently share their work, views, and research in different formats across the curriculum, drawing especially on principles practiced in English courses.
- Digital creativity: Students integrate their work on presentation, narrative, argument, and personal reflection with digital tools and strategies to represent their skills, qualities, and achievements in effective presentations.

Science

Primary courses in the high-school sequence include an introductory Environmental Science course, followed by Biology, Chemistry, and Physics. Environmental Science introduces key concepts in biology and chemistry in addition to ecological and other ideas, in the context of a thorough exploration and initial practice of scientific skills and practices that will be foundational to the remainder of the sequence. An elective Advanced Science Research course provides a forum for students to gain college-like experiences in more detailed topics selected by

students and teachers. And a semester-long Great Books course charts the development in methods, theorizing, and experimentation in the history of science from the Greeks to relativity.

Courses in this sequence will be fully aligned with Iowa Core Standards with extensive attention to the NGSS Science and Engineering Practices. These practices are central to the project-based and active-learning orientation of the science curriculum planned at the school. Some of the planned strategies and activities for meeting the content standards and science and engineering practices may include:

- Maintaining science notebooks: Students examine famous science notebooks, practice principles for maintaining their own, and see the importance of accurate and precise measurements to doing science. This practice supports development of skills from observation to experimentation.
- Claim-Evidence-Reasoning (CER) process: The CER format is frequently deployed in a range of contexts—from recommending alternating or direct current as a superior mode of transmitting energy to identifying divergent features of homeostasis in different organisms—to develop skills in supporting claims with both evidence and inference, in a scientific context and more broadly.
- Engineering projects: Students build a variety of devices across the science curriculum (and also on occasion in math) in order to solve problems and accomplish tasks, to experiment, or to demonstrate principles. These projects frequently involve iteration and aspects of the engineering design process.
- Notice-wonder: Students practice a process of observation and questioning as a mode of investigating phenomena, developing question-forming skills, and stimulating curiosity.
- Following and designing experimental protocols: Through repeated experiences with experimentation, students develop familiarity with scientific instruments, an ability to follow and formulate precise procedures, and an appreciation of how those procedures are designed to address experimental questions.
- Reading scientific papers: As appropriate by level, students learn about the structure and practice of scientific writing, developing their ability to make sense of scientific papers as they also learn about the phenomena and findings discussed.
- Data collection and analysis: Students work with real-world data from different types of research and inquiry and practice tools for analyzing it, in addition to collecting and analyzing data for their own purposes.
- Scientific poster design and presentation: Students learn to share scientific findings and information in different settings, including, for instance, as a poster presentation.

Social Studies

Primary courses in the social studies sequence will include the yearlong courses World History and US History, and two semester-long courses in American Government and Economics. Two additional year-long Great Books courses in the history of ideas will be available to interested students. In these courses, students practice historical skills in considering the growth and transmission of concepts, emerging disciplines and methodologies, and the impact of these ideas on the historical stage. They also provide a more granular, primary-text approach to the events and figures studied in the other courses in the Social Studies sequence.

The curriculum will adhere to the Iowa Social Studies Standards, including the inquiry and content anchor standards. Some of the planned strategies for learning the content and inquiry anchor standards in social studies courses may include:

- Timelines: History courses rooted in chronology enlist students in creating and expanding timelines throughout the course to support thinking about cause and effect.
- Experiential learning: The American Government course pursues an experiential learning approach for exploring civic rights and responsibilities, engaging with controversial issues, student participation in local and school governance, and simulations of democratic processes.

- Scaffolded research papers: Research papers or projects on topics of students' guided choosing include stages of inquiry, research, question and claim development, source identification and evaluation, evidence-supported reasoning, and drafting and revision.
- Maintaining a notebook: Students maintain a social sciences notebook to record short (one to three paragraphs) summative and reflective reaction to readings, primary sources, and class discussions. The notebook is also used for recording answers to guiding questions based on assigned readings, increasing the depth of student reading comprehension and understanding.
- Debates: Students defend positions in the face of opposing argumentation regarding a range of topics, from claims about cause and continuity to historiographical disputes, as well as in the context of historical reenactments.
- Project-based learning: Students engage in projects of differing scope involving authentic tasks and often collaboration, such as developing a business plan for a gig economy company.

Mathematics

Mathematics follows an integrated sequence for the first two years in which students cover the essential elements of algebra and geometry. As students enter the third year they diverge into either a Precalculus - Calculus sequence for the students interested in the challenge of more advanced coursework, or they proceed into a third year of integrated mathematics. Students who are not ready to begin algebra in Grade 9 may start with a pre-algebra course to solidify their understanding of, and facility with, basic mathematics facts. Students who need more substantive review or who require extended practice may avail themselves of the IXL program which is made available to students at no cost on a supplementary basis. In addition, a semester-long Great Books course in the history of mathematics provides interested students with a primary-text exploration of the development and exploration of transformative mathematical advances, including works by Euclid, Descartes, Newton, Leibniz, and Lobachevsky.

The curriculum will adhere to the Iowa Mathematics Standards, including content standards and the mathematical practices. Some of the planned strategies for helping students to meet these standards include:

- Use of interactive tools and simulations: Students use tools including Desmos, Geogebra, PhET interactive simulations, and others to visualize, understand, and analyze mathematical phenomena.
- Real-world projects and problems: Students frequently have the opportunity to encounter and explore mathematical problems in everyday contexts and technologies. These experiences, often framed as group projects or challenges, support creativity and growth in mathematical practices while also strengthening students' perception of the relevance of their study.
- Connections to science and engineering: Among the real-life applications of mathematical concepts and tools are their foundational roles in science and engineering tasks, which are exemplified in projects like building strong bridges, designing roller coasters, and constructing catapults.
- Proving and explaining: Students are called upon in group work, individually, and in more formal presentations and other settings to prove mathematical claims and explain them to others.
- Using models and statistics: Students construct mathematical models to solve problems and deploy statistical analysis to make sense of a range of phenomena.
- Practice: Students complete problem sets and use adaptive tools like IXL to practice their problem-solving and analytical skills.

Middle School Curriculum

In addition to differences in course content due to grade level and strategies discussed above such as heavier scaffolding due to developmental considerations, several other features of the middle school curriculum diverge from the model employed at the high-school level.

In the middle school grades, mathematics and English will be offered as standard, single-subject courses meeting every day (sometimes more often) and progressing in a typical unit-by-unit fashion. This is in light, in part, of the practice-intensive nature of progress in these subjects and the need for consistent exposure.

Within Middle School, other core subject areas—particularly science and social studies—will be structured as an alternating series of one- to two-week intensive units focused on a central problem or engaging task. Several mission-aligned considerations motivate this arrangement. Large, immersive, collaborative tasks fit well into the model of project-based learning and unlock its benefits of relevance and active learning. One example of such a ‘mini-course’ might involve students undertaking a historical documentary project regarding an event of local history. The duration of the project and longer daily sessions would permit engagement with members of the community and community resources to support inclusion of oral histories and primary documents or resources. And creation of a complex final authentic work project develops skills of planning, collaboration, and execution.

From a curricular perspective, such projects also provide an opportunity to make clear and strong connections between skill and content standards. Teachers will identify several key skills particularly well suited to the nature of the project and content topic and then scaffold development of these skills carefully throughout the duration of the project. Sustained attention to particular skills and content allows teachers to draw students’ attention to these objectives in more meaningful and enduring ways, both at the class level and by incorporating discussions and assessments on the skill and content into meetings and communications with individual students. This sort of apparent and intentional design and instruction around paired skill and content objectives plays a metacognitive role in supporting reflection by students not only on their own skill development, but on the powerful ways that skills and content are both intertwined in authentic work problems. The applied understanding students can draw from this concerted focus is intended to prepare them for a skills-forward high-school experience in which they are equipped and motivated to focus on skill development as well as content learning even as specialization and content demands increase.

10. Assessment of Student Progress

10.1. Describe how the proposed charter school will use assessments to measure and report student progress on the performance framework.

This should describe how the proposed charter school will administer, analyze, and use assessment results related to the performance framework (see the Charter School Contract Performance Framework section of the guidance).

Assessment at the school comprises two main and complementary categories of measurement: (1) local, largely formative assessments administered frequently surrounding concrete demonstrations of skill and content learning objectives, and (2) external, largely summative or diagnostic assessments administered infrequently to validate and contextualize those internal measures, and also for placement or diagnostic purposes.

The school will comply with all local, state, and national testing requirements and procedures. This means that among other assessments, the school will administer ISASP assessments in Mathematics and English-Language Arts in grades 6-11, as well as in science in grades 8 and 10. In addition, the school will administer the required Conditions for Learning Surveys. These assessments are integrated with a schedule of other standardized external exams constructed to achieve needed standardized measures while otherwise focusing learning time and interactions on formative assessments. In addition to ISASP, the school plans to administer preACT 8/9 tests to 8th grade students in the spring and the ACT to students in grades 10 and 11 interested in college opportunities.

This collection of external tests will be analyzed along several different lines. Along with the ISASP scores, the ACT results will offer students, families, school, and relevant external bodies valuable information on individual student progress and needed areas of growth. These considerations can inform student/family discussions with teachers and counselors and can be the basis for individual interventions as needed. At the schoolwide level, the tests again have multiple functions. First, ACT tests act as effective early and late measures of student growth in college readiness in high school, with the ISASP results offering a buttressing and complementary picture on an annual basis. They provide critical information about the efficacy of school programs by subject area, across grade levels, and as a whole. Disaggregated results will be analyzed to ensure that the school is helping all students to grow, and to measure the efficacy of various kinds of intervention. An additional role for this data is to supplement and validate the school's internal and ongoing measures of student growth. Because the school is especially focused on formative feedback, normed external exams offer a welcome summative reference point to contextualize the frequent and lower-stakes measures of growth that make up students' ongoing feedback. The school will monitor correlations between these two sets of assessment data to understand any deviations, strengthen the objectivity of internal measures, and to leverage any apparent relationships to improve student growth.

In addition to the ACT and ISASP exams, the school will plan to administer the NWEA MAP test early in the fall of each year. The MAP test supplements the information about student attainment and growth in different subject areas, but will be used, importantly, as a diagnostic tool that will help teachers and counselors better meet the needs of individual students during the year. The MAP test offers teachers a growth oriented characterization of where students are at the start of the year to support gap-filling and other planning for the year. MAP tests can also be used where needed for placement purposes.

In addition to the useful functions of this regime of external exams, the school will also be collecting and analyzing a uniquely rich stream of internal assessments. As discussed elsewhere (section 9.1), formative feedback is a critical component of the school's goal of creating engagement through active learning. This feedback is generated in the context of authentic work products ("artifacts") rather than tests, with a frequency and focus on growth that supports conversations between teacher and student about how to improve. Categories of assessment include learning skills, content standards, and other work habits or characteristics. Beyond attendance (which will be tracked and reported), teachers record observations about each student's engagement in class each day, using the streamlined tool in Feedback Forward. All of these measures are tracked in the Feedback Forward system as developing *trends*, meaning that they are monitored and displayed by category so that the student, teachers, and administrators can observe the trajectory in assessment scores. Teachers, and students themselves, can use these trajectories as a source for goal setting for students—identifying appropriate areas to focus on subsequent work in order to realize individualized goals. In addition, administrators can view dashboards capturing these trajectories at the individual, class, or schoolwide level in order to identify needs and develop interventions and then measure their impact. (A specific response-to-intervention tool helps to monitor and document the impact of interventions.) The system will also identify trends requiring interpretation or additional follow-up. When correlated with individual and schoolwide external exam reports, these assessments can provide powerful overarching characterizations of student performance, as well as potentially telling correlations between behaviors (such as engagement) and outcome.

Of particular significance, and a unique aspect of Feedback Forward and the entire Quest Forward approach to assessment is the attention to process dimensions of assessment as well as to product dimensions. While learning outcomes, and the artifacts of student production, are important markers for student achievement, student work process provides leading insights into overall student understanding and an opportunity for intervention when students are not achieving targeted benchmarks. So often problems in work product are rooted in the underlying work process. Being able to identify and address these will provide the Quest Forward Charter School Cedar Rapids with an ability to reach students who have historically fallen short of their potential.

11. Proposed Identification and Provision of Student Supports

11.1. Describe the proposed charter school's plan for identifying and serving students with disabilities, including but not limited to compliance with applicable laws and regulations.

This should describe the school's service delivery plans and referral process, including related professional development, for students with disabilities. For additional guidance please refer to the Departments webpage at:

<https://educateiowa.gov/pk-12/special-education> for guidance specific to Service Delivery Plans visit:

<https://educateiowa.gov/pk-12/special-education/special-education-state-guidance/district-developed-service-delivery-plan>. A charter school is eligible for Area Education Agency services based on the address of the main office of operations.

In order to ensure Students With Disabilities (SWD) receive a Free Appropriate Public Education (FAPE) in the Least Restrictive Environment (LRE), the School District will create a District Developed Service Delivery Plan (<https://educateiowa.gov/sites/default/files/documents/DDSDP%20Revised%20February%202013.pdf>) with a group of individuals that includes parents of eligible individuals, special education and general education teachers, administrators, and at least one Area Education Agency (AEA) representative. The District and AEA Special Education Director Checklist for Requirements (<https://educateiowa.gov/documents/district-developed-service-delivery-plan/2019/02/district-and-aea-special-education>) will also be completed to ensure compliance with Iowa state laws and federal laws as per the Individuals with Disabilities Education Act (IDEA). In addition, the School District will access Iowa's Special Education State Guidance (<https://educateiowa.gov/pk-12/special-education/special-education-state-guidance>) to ensure FAPE.

The School District will assume responsibility for programming and delivering related services to SWD, as identified in the student's Individual Educational Plan (IEP) with adherence and fidelity to Iowa's Administrative Rules of Special Education

(<https://educateiowa.gov/pk-12/special-education/administrative-rules-special-education>). The School District will access the State's instructional resources and support, especially with respect to the responsibilities that exist for providing FAPE to children with disabilities and ensuring that their needs are met. For example, Iowa IDEA Information (i3) (<https://iowaideainformation.org>), Parent Information (<https://educateiowa.gov/pk-12/special-education/parent-information>), and Special Education Programs and Services (<https://educateiowa.gov/pk-12/special-education/special-education-programs-and-services>).

The School District's Service Delivery Continuum will include within their schools:

Consulting Teacher Services: Consulting Teacher services are defined as indirect services provided by a certified special education teacher to a general education teacher in adjusting the learning environment and/or modifying his/her instructional methods using specially designed instruction strategies to meet the individual needs of a student with a disability receiving instruction in the general education classroom.

Co-Teaching Services: Co-teaching services are defined as the provision of specially designed instruction and academic instruction provided to a group of students with disabilities and nondisabled students. These services are provided by the special education teacher and general education teacher in partnership to meet the content and skills needs of students in the general education classroom. These services take shape in a variety of manners. For example, teachers co-plan, divide the class, and provide the instruction to smaller groups, or teachers co-plan and then co-instruct different components of the content. The effectiveness of services provided through co-teaching has a strong research base.

Collaborative Services: Collaborative services are defined as direct specially designed instruction provided to an individual student with a disability or to a group of students with disabilities by a certified special education teacher in a general education classroom to aid the student(s) in accessing the general education curriculum. These services are provided simultaneously with the general education content area instruction.

Pull-Out Services: Pull-Out services are defined as direct specially designed instruction provided to an individual student with a disability or a group of students with disabilities by a certified special education teacher to provide supplementary instruction that cannot otherwise be provided during the student's regular instruction time. These services are provided in an individual or small group setting for a portion of the day. Pull-out services supplement the instruction provided in the general education classroom through Consulting Teacher services or Collaborative/Co-teaching services. The specially designed instruction provided in Pull-out settings does **not** supplant the instruction provided in the general education classroom.

Special Class: Special Class services are defined as direct specially designed instruction provided to an individual student with a disability or a group of students with disabilities by a certified special education teacher to provide instruction which is tied to the general education curriculum, but has been modified to meet the unique needs of the student(s) in a self contained setting (including, but not limited to special classes, special schools, home instruction, and instruction in hospitals and institutions). This means the student is receiving his or her primary instruction separate from non-disabled peers.

A referral for students suspected of having a disability will be initiated by school personnel or parental request with supporting documentation when the following determinations have been made:

1. The activities described in the general education intervention procedures above have been implemented, but have been unsuccessful in addressing the areas of concern for the student.
2. The parents of the child receiving general education interventions requested, prior to the completion of the interventions, that the school conduct an evaluation to determine the child's eligibility for specially designed instruction and related services as a student with a disability. In this case, the activities described in the general education interventions procedures will be completed concurrently with the evaluation but prior to the determination of the student's eligibility for specially designed instruction.
3. Significant risk factors are present or if the student demonstrates severe cognitive, physical or sensory impairments, or presents as a danger to self or others, an individual intervention plan will be developed as the child awaits the formal evaluation.

The School District will follow Iowa's Multi-Tiered System of Supports (M-TSS) (<https://educateiowa.gov/pk-12/learner-supports/multi-tiered-system-supports-mtss>), also known as Response to Intervention or RtI, as the decision-making framework of evidence-based practices in instruction and assessment that addresses the needs of all students. As an every-education process, M-TSS allows educators to judge the overall health of their educational system by examining data on the educational system as well as identifying students who need additional supports. Those supports are provided in both small group and individual settings and are monitored to ensure they support all learners in demonstrating proficiency in the Iowa Core standards and leave school ready for life.

The Iowa M-TSS framework is made up of five components.

1. Evidence-based curriculum and instruction provided at the universal level.
2. Universal screening of all students.
3. Evidence-based, instructional interventions at the targeted and intensive levels shall be provided to each student who needs them.
4. Progress monitoring for learners below expectations.
5. Data-based decision making throughout the system.

At Tier 1, evidence-based core instructional and behavioral methodologies, practices and supports designed for all students provide the foundation in general education. Tier 2 consists of supplemental instruction and interventions that are provided in addition to and in alignment with core instruction and behavioral supports to targeted groups of students identified as needing additional assistance. Tier 3 is targeted for those students who require intensive instructional or behavioral intervention in addition to and in alignment with core instruction. At this tier, instruction and intervention intensity is reflected in increased frequency, greater duration and/or more individualization. The data the School will use for this process may include state assessments, iReady diagnostics, early warning indicators such as retentions and truancy, behavioral referrals, or unsatisfactory grades in core classes on a quarterly basis.

In addition to M-TSS/RtI being a valuable resource for schools, it is also a filtering process which serves to fluidly move students through the tiers of intervention, always evaluating and monitoring their response to these interventions and making data-based decisions every step of the way. It is a process that ensures the delivery of general education interventions first to address student's academic, behavioral and/or social emotional needs. The filtering then begins as students who continue to perform below standards and show inadequate response to general education interventions, even when provided with appropriate instruction and evidence based interventions, formally enter the possible formal evaluation process.

As part of the M-TSS/RtI process, a request will be made for a formal evaluation of students who are suspected of needing a special program. This request for a formal evaluation is made by the Problem-Solving Team (PST) and occurs only after the team determines that extensive evidence/research-based efforts have been ineffective in meeting the student's educational needs OR that the intensive interventions were successful in meeting the student's educational needs, but sustained implementation of said interventions is not feasible for a regular education teacher.

Once the team determines that the student is not making adequate progress at Tier 3 or the student is making progress but only with the implementation of intensive interventions that cannot be sustained long-term by the regular education teacher, then the PST will refer for formal evaluation. Records of social, psychological, medical and achievement data in the student's cumulative folder are reviewed. Attendance records will be reviewed and where appropriate investigation of reasons for excessive absenteeism will be conducted.

Sensory screenings will be completed during M-TSS/RtI. Students being considered for special education, will be screened for vision and hearing prior to conducting an evaluation to determine the student's eligibility. Sensory screening dates must be within one year of the date of evaluation. If vision and/or hearing screenings are failed, these issues should be resolved prior to the request for a psychological evaluation.

PST members (including the parents) will decide what areas are to be evaluated. School personnel are responsible for obtaining parent consent to evaluate. Procedural Safeguards and the proposed evaluation procedures will be explained to the parent

(<https://educateiowa.gov/pk-12/special-education/parent-information/procedural-safeguards-manual-parents-rights-children-ages-3-21>).

All evaluations will be completed within sixty student calendar days of which the student is in Attendance following school receipt of the parent consent. Sixty days is determined from the date the parent signed consent. It is important to note that a parent may request an evaluation at any time. A student is not required to complete a required number of days in Tiered Interventions to be evaluated. Regardless of the amount of time in general education interventions or the number of layers, levels, or tiers in which the child has been involved, the School District cannot refuse to conduct the evaluation or delay the evaluation until the alternative strategies have been tried if the School District suspects the child has a disability.

In addition, it is important to clarify that the general education interventions described above are not required for students who demonstrate speech disorders, severe cognitive, physical or sensory disorders or severe social/behavioral deficits that require immediate intervention to prevent harm to the student or others.

An IEP must be in effect before special education and related services are provided to an eligible student and will be implemented as soon as possible following the IEP team meeting. In addition, the IEP will be accessible to each regular education teacher, special education teacher, related service provider, and other service provider who is responsible for its implementation. All teachers and providers will be informed of their specific responsibilities related to the implementation of the IEP and the specific accommodations, modifications, and supports that must be provided for the student in accordance with the IEP. The School will make substantial efforts to assist the student in achieving the goals and objectives or benchmarks listed on the IEP.

The School District will employ teachers with proper certifications available to serve SWD. The Special Education Teacher will be an employee of the School and will at a minimum possess full certification in special education and additional certifications in core subjects if needed. The School will increase the number of staff based on actual enrollment of SWD, in accordance with the level of support needed to implement specially designed instruction detailed on the IEP. The School will employ service providers who meet all licensure and/or certification requirements that apply to the related services area. Speech-language, occupational, and physical therapy services will be contracted services that the School may provide for students who qualify for those services.

The School District will, to the maximum extent appropriate, ensure that SWD are educated with children who are nondisabled. The School District shall use the term "inclusion" to mean:

- that a student is receiving education in a general education regular class setting reflecting natural proportions and age-appropriate heterogeneous groups in core academic and elective or special areas within the school community;
- a student with a disability is a valued member of the classroom and school community;
- the teachers and administrators support universal education and have knowledge and support available to enable them to effectively teach all children; and
- a student is provided access to technical assistance in best practices, instructional methods, and supports tailored to the student's needs based on current research.

In providing or arranging for the provision of nonacademic and extracurricular services and activities (including meals, recess periods, counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the School, and referrals to agencies that provide assistance to individuals with disabilities) the School will ensure that each student with a disability participates with students who are not disabled to the maximum extent appropriate to the needs of the student. This will be reflected in the School's documents, master schedule, logs, rosters, and list of referrals.

The School will make adaptations to school facilities, to the maximum extent appropriate and within provisions of the law, the Americans with Disabilities Act of 1990 (ADA), to ensure that students with disabilities enrolled in the School will be educated in the LRE.

Developing Individualized Education Plans: Students will be guaranteed FAPE, evaluations, as well as consequent placement and implementation of an appropriate IEP. The written IEP for each student will include:

- Measurable annual learning/behavioral goals that may involve the evaluation of behavior through a Functional Behavior Assessment (FBA) and development of a Behavior Intervention Plan (BIP)
- Program Components

- Goals: **S** Specific, **M** Measurable, **A** Use Action Words, **R** Realistic and relevant, **T** Time-limited (SMART)
- Progress reports to parents
- Diploma options
- Curriculum (Standard or Access)
- Assessment
- Supplementary aides and services
- Accommodations

The School District will ensure that appropriate personnel are trained on the Web Based IEP system. The Special Education Director will assist with the creation of a well written IEP by providing feedback, sharing best practices, participating in required IEP meetings, and reviewing findings on Special Education monitoring activities.

The IEP Team will include: Parent, LEA, General Education Teacher, Special Education Teacher and all additional members of the team that will be notified with a reasonable amount of time and all appropriate contacts will be made. Input from all team members and student data will be used to create an IEP.

The School will establish procedures that provide for parents, guardians, surrogate parents, or persons acting in loco parentis to participate in decisions concerning the IEPs. Parents of each student with a disability will be members of any group that makes decisions for their child. In order to ensure that parents are present at each meeting, or are afforded the opportunity to participate at each meeting: (a) parents will be notified of the meeting at least ten days prior to set meeting to ensure that they have an opportunity to attend; (b) the meeting will be scheduled at a mutually agreed upon time and place; (c) a written notice to the parent will indicate the purpose; time; location of the meeting; who, by title or position, will be in attendance; and will include a statement informing the parents that they have the right to invite individuals with special knowledge or expertise about their child. Parents will be provided at every meeting Procedural Safeguards Manual for Parents Rights for Children Ages 3-21

(<https://educateiowa.gov/pk-12/special-education/parent-information/procedural-safeguards-manual-parents-rights-children-ages-3-21>).

The School will take whatever action is necessary to ensure that the parents and the student, beginning at age fourteen (14), understand the proceedings at a meeting, including arranging for an interpreter for parents and students who are deaf or whose native language is other than English.

If a required IEP team member is unable to attend the meeting as scheduled, the parent can agree to continue with the meeting and request an additional meeting if more information is needed, or request that the meeting be rescheduled.

Timelines for IEPs include the following:

- An IEP will be developed within thirty (30) calendar days following the determination of a student's eligibility for special education and related services and be in effect prior to the provision of these services.
- A meeting shall be held at least annually to review, and revise, as appropriate, each IEP.

The IEP team will consider the following factors in the development, review, and revision of the IEP:

- Strengths of the student and concerns of the parents for enhancing the education of their child;
- Results of the initial or most recent evaluation or reevaluation;

- As appropriate, results of the student's performance on state or district-wide assessments; and/or
- Academic, developmental, and functional needs of the student.
- In the case of a student whose behavior impedes the student's learning or the learning of others, strategies, including the use of positive behavioral interventions, supports, and other strategies to address that behavior.
- In the case of a student with limited English proficiency, the language needs of the student as related to the IEP.
- In the case of a student who is blind or visually impaired, provision of instruction in Braille and the use of Braille.
- The communication needs of the student.
- Whether the student requires assistive technology devices or services.
- At least annually, whether Extended School Year (ESY) services are necessary for the provision of FAPE to the student.
- If, after considering all the factors mentioned above, the IEP team determines that a student needs a particular device or service, including an intervention, accommodation, or other modification, in order to receive FAPE, the IEP includes a statement to that effect.

Each IEP will include the following:

- A statement of the student's present levels of academic achievement and functional performance, including how the student's disability affects the student's involvement and progress in the general curriculum.
- A statement of measurable annual goals, including academic and functional goals designed to meet the student's needs that result from the student's disability to enable the student to be involved in and make progress in the general curriculum.
- A description of benchmarks or short-term objectives for students with disabilities who take alternate assessments aligned to alternate achievement standards, or any other student with a disability, at the discretion of the IEP team.
- A statement of the special education and related services, and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the student, or on behalf of the student.
- A statement of the classroom accommodations, modifications, or supports for school personnel that will be provided for the student to advance appropriately toward attaining the annual goals.
- An explanation of the extent, if any, to which the student will not participate with nondisabled students in the regular class or in the activities described above.
- A statement addressing any individual appropriate accommodations necessary to measure the academic achievement and functional performance of the student on the State or district assessments.
- If the IEP team determines that the student will take an alternate assessment instead of the regular state or district assessment of student achievement, the IEP must include a statement of why the student cannot participate in the regular assessment and why the particular alternate assessment selected is appropriate for the student.
- The projected date for the beginning of the special education, services, accommodations, and modifications described and the anticipated frequency, location, and duration of those services.
- A statement of how the student's progress toward meeting the annual goals will be measured and when periodic reports on the progress the student is making toward meeting the annual goals will be provided.

The School will ensure that the IEP team revises the IEP as appropriate to address:

- Any lack of expected progress toward the annual goals and in the general curriculum, if appropriate;

- Results of any reevaluation conducted;
- Information about the student provided to or by the parents;
- The student's anticipated needs or other matters; and/or;
- Parent requests for revisions of the student's IEP.

Generally, changes to the IEP must be made by the entire IEP team at an IEP team meeting and may be made by amending the IEP rather than by redrafting the entire IEP (interim IEP).

The School will take steps to ensure that SWD have available to them the variety of educational programs and services available to nondisabled students in the area served by the school district, including art, music, industrial arts, consumer and homemaking education, and vocational programs.

Professional development for educators working with SWD will focus on enhancing their knowledge and skills to better serve SWD. A needs assessment survey will be conducted on a yearly basis to determine topics. Topics may include:

- Understanding IEPs
- Behavior Management Strategies
- Inclusive Education Practices
- Differentiated Instruction
- Assistive Technology
- Autism Spectrum Disorders
- Specific Learning Disabilities
- Communication and Augmentative and Alternative Communication (AAC)
- Cultural Competency and Diversity
- Collaboration and Teamwork
- Legal and Ethical Issues in Special Education
- Transition Planning
- Mental Health and Wellbeing
- Data-Driven Decision Making
- Trauma-Informed Teaching
- Universal Design for Learning (UDL)

11.2. Describe the proposed charter school's plan for identifying and serving English learners, including but not limited to compliance with applicable laws and regulations.

This should summarize the school's Lau plan and use of the English Language Proficiency Assessment (ELPA). For additional guidance please refer to the Departments webpage at: <https://educateiowa.gov/pk-12/learner-supports/english-learners-el>

The School recognizes how critical the identification of English learners is for their success in a school setting. The School District will follow the Standardized Entrance and Exit Procedures for Iowa's English Learners (EL) manual ([https://educateiowa.gov/sites/default/files/documents/Iowa%27s EL Entrance and Exit Manual2-23-22.pdf](https://educateiowa.gov/sites/default/files/documents/Iowa%27s%20EL%20Entrance%20and%20Exit%20Manual2-23-22.pdf)) to ensure consistent identification of ELs, reclassify ELs, and monitor Former ELs. The School will use the English Learner Tool Kit (<https://www2.ed.gov/about/offices/list/oela/english-learner-toolkit/index.html>)

developed by the United States Department of Education Office of English Language Acquisition as a resource and a guide to ensure a successful creation and implementation of their Lau Plan.

In order to meet the linguistic, academic, social, and emotional needs of ELs, the School District will create a Lau plan. Below is a brief summary of each section:

I. Lau Plan Guiding Principles

An EL will move from where he/she is currently on the English language proficiency level continuum to being proficient in English in reading, writing, listening, and speaking skills. ELs at all levels should be provided with scaffolding based on individual needs in order to reach the next reasonable proficiency level. ELs will develop the social, cultural, and linguistic competencies required for effective communication in English.

ELs will work towards being proficient in English in reading, writing, speaking, and listening in all content areas. ELs are expected to meet the same challenging, rigorous academic content and student achievement goals that all students are expected to meet. ELs will attain the highest level on the college and career readiness standards of the ELP so that they will be successful in school. To help students use English language skills to develop 21st Century Skills (communication, collaboration, creativity, problem solving, decision making, evaluation, use of technology as a tool).

Cross-cultural awareness will be encouraged to give EL students and their families pride in their own linguistic and cultural background and a better understanding of other cultures including the U.S. school and community culture. Information about the diversity, languages, and cultural makeup of all students will be addressed so that students, staff, and other stakeholders can be more culturally aware of the cultures in the school. Opportunities will be provided to staff and students to learn more about other cultures. A warm, supportive and inclusive learning environment for all students is provided so that all students can achieve their maximum potential.

II. Identification and Placement of ELs in a Language Instruction Educational Program (LIEP)

According to chapter one of the U.S. Department of Education's EL toolkit, identifying and assessing all potential English learners is one of the most critical "affirmative steps" and "appropriate action[s]" that local education agencies (LEAs) must take to ensure eligible English learners receive language assistance services in a timely manner. Eligible students must receive placement in language instruction programs as soon as possible and within 30 days of enrollment. The School will take the following steps:

1. The School will administer the Home Language Survey (HLS) to identify potential ELs at the time of enrollment. The HLS is designed to gather information about a student's language background and identify students whose primary language or home language is other than English. This is the first step in ensuring the timely process of identifying potential ELs who qualify for language instruction programming which is critical for success in content learning. To obtain accurate information, the Schools will reassure parents that the HLS is used solely to offer appropriate educational services, not for determining legal status or for immigration purposes (*Plyler v Doe*).
2. If the HLS indicates a language other than English, the School will administer the ELPA21 Dynamic Screener to potential ELs enrolling in our charter school. The purpose of the screener will be to determine whether a student is eligible for EL services.

The process for identifying potential ELs will typically fall into one of three categories:

- Students enrolling in a U.S. school for the first time (typically kindergartners and students arriving from another country)
- Students moving within the state of Iowa
- Students moving to Iowa from an ELPA21 state.

Each situation will require different consideration for screening and the School will follow the procedures found in the Standardized Entrance and Exit Procedures for Iowa's English Learners (EL) manual. Each situation will require different consideration for screening and the School will follow the procedures found in the Standardized Entrance and Exit Procedures for Iowa's English Learners (EL) manual.

III. Description of the LIEP

The School will communicate EL identification and eligibility for EL Programming within 30 days to parents of ELs regarding the EL student's identification and placement in a Language Instruction Educational Program (LIEP). The School will, to the extent practicable, translate such notices in a language that the parent can understand. If written translations are not practicable, the School will offer EL parents free oral interpretation of the written information. In light of these obligations and the duty to timely identify all English learners, the School District will need to assess potential English learners' English proficiency and identify non-proficient students as EL as soon as practicable and should be well before the thirty-day notice deadline.

The LIEP will support both the academic English language growth as well as content area knowledge for ELs.

The School understands that while types of EL programs may differ in practice, all must be designed to provide English language services and support ELs in content learning. EL services and programs must be educationally sound in theory and effective in practice. EL programs must be designed to enable ELs to attain both English proficiency and parity of participation in the standard instructional program within a reasonable length of time. The School District will offer EL services and programs, until ELs are proficient in English and can participate meaningfully in educational programs without EL support. The School understands in order to be able to participate equally and meaningfully in instructional programs, ELs have to acquire English proficiency and recoup any deficits that they may incur in other areas of the curriculum as a result of spending extra time on English Language Development (ELD) (Castañeda, 648 F.2d at 1011). Additionally, the School District will provide appropriate special education services to ELs with disabilities. The School District will ensure that ELs who have or are suspected of having a disability under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act of 1973 are located, identified, and evaluated in a timely manner and that the language needs of students who need these related services are considered in evaluations and delivery of services. (20 U.S.C. §§ 1400-1419; 34 C.F.R. pt. 300; 29 U.S.C. § 794; 34 C.F.R. pt. 104).

Depending on the number of ELs enrolled at the School, the program delivery options may be mixed classes with English-Only Support or Direct Support provided either inside or outside of the content area classroom.

- **EL Pull-Out** is generally used in elementary school settings. Students spend part of the school day in a mainstream classroom, but are pulled out for a portion of each day to receive instruction in English as a second language.
- **Push-In Classroom Support** focuses on assisting ELs in applying English language skills during content area instruction.
- **EL Class Period** is generally used in middle school settings. Students receive EL instruction during a regular class period and usually receive course credit. They may be grouped for instruction according to their level of English proficiency.
- **Consultation** is a process by which an ESL Teacher periodically meets with ELs to monitor progress with English proficiency in the classroom. It includes collaboration with the content area teacher and/or instructional assistants to facilitate the application of English language skills during content area instruction.

Note: If parents opt their children out of an EL program or specific EL services, the children retain their status as English learners, and the School District remains obligated to take the “affirmative steps” required by Title VI and the “appropriate action” required by the EEOA to provide these English learners access to its educational programs, OCR Guidance; 20 U.S.C. § 1703(f).

IV. Ongoing, Embedded District Level EL Professional Development for Staff who Deliver Instruction or Support the LIEP for ELs

1. Administrators will complete training on understanding the ELPA 21 and how to interpret the scores and use the data for program planning. Professional development will concentrate on the areas of instructional techniques, accommodations for ELs and cultural awareness as determined by the current needs of the building.
2. LIEP staff (certified & support): EL Coordinator/teacher will attend Title III professional development opportunities provided by the AEA to ensure timely and accurate understanding and implementation of all EL requirements. The EL teacher will attend conferences, trainings, and classes related to EL including the Language and Culture Conference. The EL teacher also reads professional articles, engages in webinars, and consults with other ELL teachers to further her knowledge of ELL instruction. She has taken all ELL trainings required by the state, including the ELP modules.
3. Content and classroom teachers: All teaching staff will receive in-services that address EL issues on an on-going basis and receive information about conferences, workshops, academies, training sessions, and specialized classes that address ELL issues. A log of professional development by teaching staff will be maintained by the building principal.
4. Paraprofessionals and Building Support Staff: Paraeducators who work directly with ELs collaborate weekly with the classroom/content teacher to learn new strategies and techniques that will support the EL students’ learning of content standards and further their development of English proficiency. Building/district support staff receive in-service training regarding instructional techniques and accommodations for EL students.

V. LIEP Exit Criteria and Procedures

The School will Reclassify/Exit English learners (ELs) from a LIEP. As indicated by the Office of Civil Rights, students should be in EL services and programming because of language needs and not because of academic or content deficits. Therefore, upon receiving a proficient score on the ELPA21 summative assessment, the student has the language skills to access curriculum and if deficits in content areas exist, the School District will be responsible for remedying those deficits swiftly. The School District will wait until ELPA21 test scores are available before exiting (i.e. reclassifying) ELs. When students score 4s and/or 5s on all domain subtests of the ELPA21 (Listening, Speaking, Reading, and Writing), they will receive a determination of Proficient. Proficient students will no longer be considered English learners and are, therefore, exited. Proficient students must be reclassified or “exited” between the posting of the summative assessment (ELPA21) results and September 30 in order that reclassified students are reported properly.

VI. Monitoring Procedures after Students Exit the LIEP Program including parent notification

Once reported as reclassified/exited, students exiting from EL status will be monitored for at least two years to ensure that they are successful. The School District will ensure proper tier one support; academic deficits have been remedied and FELs are meaningfully participating in the standard program of instruction comparable to their never-EL peers. While LEAs are required to monitor former EL student performance in core academic areas, no specific protocol or form is required. However, this School District will establish rigorous monitoring systems that include benchmarks for expected growth in acquiring academic content knowledge during the academic year and take appropriate steps to assist students who are not adequately progressing toward those goals.

Occasionally there may be circumstances in which re-entry into EL programming is warranted. In accordance with the Office of Civil Rights, these circumstances should be due to a lack of English language proficiency and NOT due to academic deficits which must be addressed during EL services. If academic deficits persist after a student becomes English proficient, the School District will be responsible for remedying it as quickly as possible regardless of access to specialized funds.

VII. LIEP Evaluation

1. LIEP program evaluation will include evidence regarding progress toward meeting LIEP goals in both English language development, academic achievement, and cultural awareness. Annually the School's Lau Team will meet to analyze student growth.
2. Evaluation of the English Language Learner program is essential, providing valuable information for decision making, which will lead to improved instructional services to our English Language Learners. The data will be used for planning for EL instruction in core classes and English language development in both the EL classroom and general ed/content classrooms. Through the use of quality tools and the "English Language Learner District Self-Study Guide" the district's EL staff will follow the Quality Continual Improvement (QCI) model to evaluate and improve the EL services.

Data will be shared yearly with parents, teachers, community members, administrators, and the charter school board. The following will be looked at to evaluate the impact on future programming and services for ELs.

- School climate and support for LIEP students
- Professional Development needs
- Meeting the needs of the ELL student scheduling
- Effectiveness of mainstream-ESL collaboration
- Effectiveness of school and program communication with parents

11.3. Describe the proposed charter school's plan for identifying and serving gifted and talented students, including but not limited to compliance with applicable laws and regulations.

This should summarize the school's gifted and talented plan. For additional guidance please refer to the Departments webpage at: <https://educateiowa.gov/pk-12/advanced-learning-opportunities/gifted-talented>

Definition

Iowa Code 257.44 Gifted and talented children defined.

"Gifted and talented children" are those identified as possessing outstanding abilities who are capable of high performance. Gifted and talented children are children who require appropriate instruction and educational services commensurate with their abilities and needs beyond those provided by the regular school program.

Gifted and talented children include those children with demonstrated achievement or potential ability, or both, in any of the following areas or in combination:

1. General intellectual ability.
2. Creative thinking.
3. Leadership ability.
4. Visual and performing arts ability.
5. Specific ability aptitude. 89 Acts, ch 135, § 44

I. Program Goals, Objectives, and Activities to Meet the Needs of Gifted and Talented Children

The School recognizes the special needs of gifted and talented learners and is committed to offering programs that provide maximum development of each student's academic talents. Instructional programs for gifted students emphasize acceleration and enrichment based on students' strengths and needs as indicated by their giftedness. The philosophical focus of the gifted program promotes increased access, rigor, and achievement.

The Gifted Education Program will emphasize a quantitatively differentiated curriculum based on content, concepts, processes, and applications through products/projects in language arts, mathematics, science and/or Social Science. Such a differentiated curriculum provides for in-depth consideration of topics and concepts beyond the requirements of regular courses, and therefore, is designated as an academically accelerated program.

II. Student Identification Criteria and Procedures

The School will follow Iowa Administrative Code 281.59, Gifted and Talented Programs. 281.59(5) for Student identification criteria and procedures.

Students will be placed in a gifted and talented program in accordance with systematic and uniform identification procedures that encompass all grade levels and that are characterized by the following:

- a. Identification will be for the purpose of determining the appropriateness of placement in a gifted and talented program rather than for categorically labeling a student.
- b. The decision to provide a student with a gifted and talented program will be based on a comprehensive appraisal of the student, consideration of the nature of the available gifted and talented program and an assessment of actual and potential opportunities within the student's regular school program.
- c. Multiple criteria shall be used in identifying a student, with no single criteria eliminating a student from participation. Criteria will combine subjective and objective data, including data with direct relevance to program goals, objectives and activities.

A student is eligible for gifted programs from kindergarten through Grade 12 if the student meets the criteria under 1. or 2. below:

1. The student demonstrates:
 - a. The need for a special program
 - b. A majority of characteristics of gifted students according to a standard scale or checklist (the Torrance Tests of Creative Thinking)
 - c. Superior intellectual development as measured by an intelligence quotient of two standard deviations or more above the mean on an individually administered standardized test of intelligence.
2. The student is a member of an underrepresented group and meets the criteria for increasing the participation of underrepresented groups in programs for students who are gifted.

The School will implement the following procedures for those students who may be gifted:

1. The screening process for the School will include the development of a talent pool of students who demonstrate unusual ability;
2. A student profile is developed for a student being referred to the Child Study Team (CST);
3. A CST meeting is convened in order to review the information gathered in the student's profile; and
4. The CST makes the determination of whether or not to continue the evaluation process, based on the supporting documentation and a majority of gifted characteristics as measured by the Gifted Characteristics Checklist.

Once it has been determined that a student meets the screening requirements to proceed with a gifted evaluation, the gifted coordinator will collect the documentation required for referral and schedule a meeting with the student's parent, teachers, and school psychologist to review the documents and secure parent permission to

evaluate the student. The minimum evaluations for determining eligibility address the following: (a) Need for a special instructional program; (b) Characteristics of the gifted; (c) Intellectual development; and (d) Evaluation to increase participation of students from underrepresented groups in programs for the gifted. Upon review of the completed evaluation and referral packet, the district staff will notify the gifted coordinator of eligibility. If the student is found ineligible, parents will be notified in writing. If it is determined that the student is eligible for gifted services, the gifted coordinator will schedule an Educational Plan (EP) meeting with the student's parent(s), and a teacher of the gifted to develop an EP.

In the event that the number of eligible students exceeds the available openings, participants shall be selected according to the extent to which they can benefit from the program.

Each identified student's progress shall be reviewed at least annually to consider modifications in program or student placement.

III. Educational Plan (EP)

The School will be responsible for developing EPs for students who are identified solely as gifted. The EP will include:

- A statement of the student's present levels of educational performance that may include, but is not limited to, the student's strengths and interests, the student's needs beyond the general curriculum, results of the student's performance on state and district assessments, and evaluation results;
- A statement of goals, including benchmarks or short-term objectives;
- A statement of the specially designed instruction to be provided to the student;
- A statement of how the student's progress toward the goals will be measured and reported to the parents; and
- The projected dates for the beginning of services and the anticipated frequency, location, and duration of these services.

The EP team will consider the following during development, review, and revision of the EP:

- The strengths of the student and the needs resulting from the student's giftedness;
- The results of recent evaluations, including class work and state or district assessments; and
- In the case of a student with limited English proficiency, the language needs of the student as they relate to the EP.

Timelines for development of the EP will include the following:

- An EP is in effect at the beginning of each school year for each student identified as gifted who is continuing in a special program;
- An EP is developed within 30 calendar days following the determination of eligibility for specially designed instruction in the gifted program and is in effect prior to the provision of these services;
- Meetings are held to develop and revise the EP at least once every four years for students in Grades 9–12; and
- EPs may be reviewed more frequently, as needed, such as when a student transitions from elementary to middle school or from middle to high school.

EP participants will include:

- The parents, whose role includes providing information on the student's strengths, expressing concerns for enhancing the education of their child, participating in discussions about the child's need for specially designed instruction, participating in deciding how the child will be involved and participate in the general

curriculum, and participating in the determination of what services the district will provide to the child and in what setting;

- At least one teacher of the gifted program;
- One regular education teacher of the student who, to the extent appropriate, is involved in the development of the student's EP; involvement may include the provision of written documentation of a student's strengths and needs for review and revision of the subsequent EPs;
- If needed, a representative from the District who is qualified to provide or supervise the provision of specially designed instruction for students who are gifted and is knowledgeable about the general curriculum and the availability of resources of the school district; at the discretion of the district, one of the student's teachers may be designated to serve as the representative of the district;
- An individual who can interpret the instructional implications of the evaluation results; this individual may be a teacher of the gifted, a regular education teacher, or a representative of the school district as described above;
- At the discretion of the parent or the school district, other individuals who have knowledge or special expertise regarding the student, including related services personnel (Note: The determination of the knowledge or special expertise shall be made by the party who invited the individual to participate in the EP meeting); and
- Whenever appropriate, the student.

The School will take the following steps to ensure that one or both of the parents of a student identified as gifted is present or provided the opportunity to participate at EP meetings:

- Notifying parents of the meeting early enough to ensure that they will have an opportunity to attend;
- Scheduling the meeting at a mutually agreed on time and place; and
- A written notice to the parent indicating the purpose, time, location of the meeting, and who, by title or position, will be in attendance. It will also include a statement informing the parents that they have the right to invite an individual with special knowledge or expertise about their child. If neither parent can attend, the School will use other methods to ensure parent participation, including individual or conference telephone calls.

A meeting may be conducted without a parent in attendance if the School is unable to obtain the attendance of the parents. In this case, the School will maintain a record of its attempts to arrange a mutually agreed on time and place. These records include such items as:

- Detailed records of telephone calls made or attempted and the results of those calls;
- Copies of correspondence sent to the parents and any responses received; and
- Detailed records of visits made to the parent's home or place of employment and the results of those visits.

The School will take whatever action is necessary to ensure that the parent understands the proceedings at the meeting, including arranging for an interpreter for parents who are deaf or whose native language is other than English. A copy of the EP shall be provided to the parent at no cost.

An EP is in effect before specially designed instruction is provided to an eligible student and is implemented as soon as possible following the EP meeting.

The EP will be accessible to each of the student's teachers who are responsible for the implementation, and each teacher of the student will be informed of specific responsibilities related to the implementation of the EP.

IV. Instructional Strategies for the Gifted and Talented and Program Delivery Models

The School will offer various services to meet the needs of the gifted student based on the Educational Plan. Specific instructional strategies include an effective and differentiated approach designed for the abilities of gifted students. The following curriculum differentiation strategies will be in place to ensure that each individual student progresses in the curriculum to the maximum extent appropriate: (1) Acceleration, (2) Differentiation, (3) Flexible Grouping, (4) Ability Grouping, (5) Independent Study, (6) Curriculum Compacting, (7) Learning Centers, and (8) Enrichment Clusters.

A range of service delivery options will be available to meet each gifted student's special needs based on the student's Educational Plan (EP) and will be provided with administrative support to assure adequate funds for materials and professional development. The following delivery models may be available for students depending on the number of students enrolling in the School:

Gifted /Self-Contained Class (6-12) – The teacher of the gifted provides total instruction in content area courses (Honors and/or Advanced Placement) and/or State-approved high school gifted elective courses in which all of the students have met gifted eligibility. Content and pacing will be differentiated to the degree that activities are clearly intended for students evidencing a need beyond the general curriculum as indicated by their individual EP.

Support Facilitation (6-12) – The teacher provides services one-on-one. The teacher meets with an individual student or small group of students within a traditional classroom but not as a coteacher. The teacher of the gifted provides support for the gifted students' achievement in the general classroom. Gifted-endorsed teacher, general classroom teacher, and the gifted student (as appropriate) collaboratively plan the development of challenging assignments that substitute for or extend core curriculum objectives to meet the needs of the student. The teacher documents curriculum modifications through (a) separate lesson plans, (b) time log of collaborative planning, and (c) individual student contracts. The teacher of the gifted may provide support facilitation by working and moving among two or more classrooms working with teachers and students identified as gifted as needed. Frequency and intensity of support varies based upon students' and/or educators' need for assistance. Services may include revised lessons, independent research or related activities for gifted learners.

Senior High Gifted Consultation (9-12) – The general education teachers and teachers of the gifted meet regularly to plan, implement and monitor instructional alternatives designed to ensure that the gifted students achieve successful accomplishment of gifted goals in the Advanced Placement, Honors, International Baccalaureate or other academically rigorous programs. Gifted students are not assigned to a gifted course, rather receive consultation services from a teacher who is endorsed to teach gifted or on an approved waiver to complete the gifted endorsement.

V. Staff In-Service Education Design

Professional development for teachers of gifted students is essential to ensure they can meet the unique needs of their high-ability students. The following topics will be provided based on a yearly needs assessment and data reviews:

ALL TEACHERS

1. **Assessment and Identification:** Training in recognizing and assessing giftedness is crucial. It ensures students are appropriately identified and placed in gifted programs.
2. **Cultural Sensitivity:** Understand the unique challenges and strengths of gifted students from diverse backgrounds.
3. **Parent and Family Engagement:** Training on building effective partnerships with parents and guardians can create a supportive environment for gifted students.

GIFTED TEACHERS

1. Gifted Education Training: Ensures that teachers have a solid understanding of the principles and strategies specific to gifted education.
2. Educational Plans (Eps): Training on creating and implementing Eps, which outline the unique needs and goals of each gifted student.
3. Differentiation: Gifted students have a wide range of abilities and learning styles. Training on differentiation techniques helps teachers tailor instruction to individual needs.
4. Curriculum Enrichment: Professional development should focus on creating and adapting enriched curriculum materials, which can challenge and engage gifted students. Active use of Quest Forward library of 2,200 student projects (quests) provides teachers with the opportunity to enhance and differentiate curriculum to meet the interests and needs of gifted students.
5. Technology Integration: Explores how technology can enhance and expand the learning experiences for gifted students. Digital creativity and intelligent use of emerging digital tools is an area of particular promise for gifted students and ensuring that students have the opportunity to explore these elements is essential to their full development.
6. Critical and Creative Thinking: Professional development should emphasize strategies to develop critical and creative thinking skills in gifted students. Creative thinking includes both digital creativity and the ability to individualize and differentiate student educational plans and requirements, drawing upon opportunities within the community and available through dual enrollment and other opportunities for students to pursue options outside the traditional school walls.

VI. Evaluation Criteria and Procedures and Performance Measures

The School's effectiveness in serving Gifted and Talented students will be evaluated in the ability for the student to demonstrate mastery on the Iowa Statewide Assessment of Student Progress (ISASP) Reading and Mathematics sections. In addition, data from State, district, and school based assessments (baseline, screening, progress monitoring and diagnostic) will be collected and monitored regularly by the Gifted teacher to ensure appropriate curriculum and instruction for highly able students is being implemented on a daily basis. The School's administration will adopt a stimulating curriculum to develop the talent of a gifted student and, through classroom walk-throughs and teacher evaluations, will ensure the learning experiences within the classroom are rich and individualized. Teachers will be expected to teach at a higher degree of difficulty with their content, processes and products being more complex, more abstract, more open-ended, and more multifaceted.

VII. Qualifications Required of Personnel Administering the Program

The Iowa Board of Education Examiners (BOEE) is the agency responsible for providing leadership in practitioner licensure as well as practitioner rights, responsibilities, practices, and ethics.

The School will employ teachers with the gifted endorsement. Gifted teachers will be authorized to serve as a teacher or a coordinator of programs for the gifted and talented from the pre-kindergarten level through grade twelve.

VIII. Additional Resources

The School will access the following resources to provide an exemplary program to all gifted students:

Belin-Blank Center - Gifted Education and Talent Development - Located at the University of Iowa, the Belin-Blank Center's mission is to empower and serve the international gifted community through exemplary leadership in programs, research, and advocacy.

Guidelines for Developing an Academic Acceleration Policy - These guidelines provide educators and policy makers with guidance to create a vision grounded in research and to adopt policy to support this vision for the

K–12 grade students who require an accelerated learning pace and advanced curriculum that assures student academic success.

Iowa Acceleration Scale (3rd Edition) - A tool to help schools make effective decisions regarding a grade-skip. The IAS guides a child study team (including educators, teachers, parents, and other professionals) through a discussion of the academic and social characteristics of the student.

Iowa Talented and Gifted Association - ITAG is Iowa's association of interested parents, educators, and concerned citizens dedicated to meeting the needs of talented and gifted children and youth. ITAG was organized more than 25 years ago with a vision that gifted/talented children in the state of Iowa should receive an education commensurate with their abilities and needs and is an affiliate of the National Association for Gifted Children.

G&T students will have the opportunity to accelerate their learning on a subject-by-subject basis by progressing through courses at their own pace, by challenging courses for credit by exam, and by taking more advanced courses through available colleges and universities. Students interested in whole grade acceleration may avail themselves of our early high school entry program whereby students are allowed to step over Grade 8 and move directly into high school level work, but with an understanding that if it proves to be too challenging they can adjust their load and move back on a traditional high school trajectory. Students will also have the opportunity to take more advanced courses through New College Florida, with whom we have made arrangements to provide the equivalent of a first year of undergraduate education to students. Finally G&T students whose goal is to move quickly through high school into a non-college path will also be able to make arrangements to do so via dual or concurrent enrollment in career oriented programs.

11.4. Describe the proposed charter school's plan for identifying and serving students who are failing academically or are below grade level, including but not limited to compliance with applicable laws and regulations.

This should describe the school's plan for identification and support for students:

- That do not meet benchmark on screening assessments,
- Are not proficient on statewide assessments,
- Have failing grades, and/or
- Are chronically absent.

For additional guidance please refer to the Departments webpage at: <https://educateiowa.gov/pk-12/learner-supports/risk>

Identifying at-risk students at all grade levels is crucial for providing early intervention and support to help them succeed academically and socially. The School District will identify an at-risk student based on Iowa's Administrative Code 281-12.2(256). "At-risk student" means any identified student who needs additional support and who is not meeting or not expected to meet the established goals of the educational program (academic, personal/social, career/vocational). At-risk students include but are not limited to students in the following groups: homeless children and youth, dropouts, returning dropouts, and potential dropouts. The School District will include in its comprehensive school improvement plan valid and systematic procedures and criteria for identifying and meeting the needs of at-risk students, similar to the Four Domains of Risk Factors (<https://educateiowa.gov/documents/four-domains-risk-factors>). The School District's plan will have two components: one is the identification process and the second is using the data for selection and implementation of research-based intervention programs.

Identification Process

1. Early Warning System, Academic Performance, Below Grade Level Achievement: Students who consistently perform below grade-level expectations in core subjects (Reading, Math, and Writing).
2. Early Warning System, Attendance and Tardiness, Chronic Absenteeism: Students with a high rate of unexcused absences or tardiness as irregular attendance can hinder learning.
3. Early Warning System, Behavior and Discipline, Frequent Behavior Issues: Students who have recurrent behavior problems, such as disruptions, suspension, or disciplinary referrals.
4. Standardized Test Scores, Scoring Below Proficient: Students who score significantly below proficient levels on the Iowa Statewide Assessment of Student Progress (ISASP). Assessments will be administered in Math (Grades 6-11), English- Language Arts, including Reading and Writing (Grades 6-11), and Science (Grades 8, and 10).
5. English Language Proficiency, Limited English Proficiency: Multi-Lingual Learners who struggle with language acquisition and proficiency and may need additional support.
6. Special Education Needs, Individualized Education Program (IEP): Students with disabilities who face challenges despite having an IEP.
7. Developmental Milestones: For younger students, tracking the achievement of age-appropriate developmental milestones to help identify potential concerns.
8. Socioeconomic Factors, Low Socioeconomic Status: Students from economically disadvantaged backgrounds may be at risk due to limited access to resources and support.
9. Family and Social Issues, Family Instability: Students facing family issues, such as homelessness, foster care, or frequent moves.
10. Reading Readiness, Reading Difficulties: Early intervention is essential for students who struggle with pre-reading skills in the early grades.
11. Mental and Emotional Health, Mental Health Issues: Students with mental health challenges, such as anxiety, depression, or ADHD.
12. Peer Relationships, Isolation or Bullying: Students who have difficulties forming positive peer relationships or who are targets of bullying.
13. Parent and Guardian Input: Engaging parents and guardians to provide information about their child's development and challenges can be valuable in the identification process.

Using the Data for Selection and Implementation of Research-based Intervention Programs

It is important to note that the identification process will be ongoing and not rely solely on a single criterion. A multi-faceted approach that combines both quantitative and qualitative data is the most effective method to identify at-risk students. Once at-risk students are identified using the criteria above, administrators and educators will implement targeted interventions and supports to address their specific needs and help them succeed. These include:

1. Strategies for Differentiating Instruction
(https://educateiowa.gov/sites/default/files/documents/0809_pk12_dl_StrategiesForDifferentiatingInstruction.pdf)
2. Small-Group Instruction
3. Tutoring and Mentoring
4. Peer Tutoring
5. Extended Learning Time
6. Study Skills Workshops
7. Early Literacy Interventions
8. Specialized Reading Programs
9. Math Intervention Programs
10. Individualized Education Plans (IEPs)
11. Behavior Interventions and Plans
12. Social and Emotional Learning (SEL) Programs
13. Counseling Services
14. Speech, Language, Occupational or Physical Therapies
15. Family Involvement
16. Technology-Based Interventions (iReady)
17. Assistive Technology
18. Sensory Support
19. Transition Planning
20. Dropout Prevention
(https://dropoutprevention.org/wp-content/uploads/2018/03/NDPC_15_effective_strategies.pdf)

It is important to continuously assess the effectiveness of these interventions and make adjustments as needed. The School will assess at a minimum, every nine weeks. Additionally, a team approach involving administrators, teachers, counselors, parents and specialists will ensure support to at-risk students is effective and will provide a comprehensive network of assistance.

Identification of students will be highly dependent on student(s) needs. The School District will be different and the process dynamic. The School District will identify individual students at risk of school failure and use caution not to identify groups or clusters of students or even schools with a large concentration of high risk students. Early Warning Systems will be crucial for future success.

The School District will provide alternative option education programs to students who are either at risk of dropping out or have dropped out. An alternative options education program may be provided in a district, through a sharing agreement with a school in a contiguous district, or through an areawide program available at the community college serving the merged area in which the school district is located. Each area education agency shall provide assistance in establishing a plan to provide alternative education options to students attending a public school in a district served by the agency.

12. Proposed Co-Curricular and Extracurricular Programs

12.1. Describe the proposed charter school's co-curricular and extracurricular programs, including how the programs will be funded and delivered.

Co-curricular and extracurricular programs are not required to be offered.

Sports

The school does not plan, at the time of opening, to offer sports programs. The school will be supportive of arrangements to enable students to participate at the district level if possible, or independently and in club settings.

Clubs

The school will support student-led clubs according to interest and availability of sponsors, particularly those that intersect with the school's mission. This might be as a space to explore pre-professional or academic interests, to develop skills and expertise, or to participate in service or other projects that foster collaboration, planning, and completion of complex projects. We will also explore facilitating collaboration with local community organizations and service groups to provide a rich set of experiences for students.

Dual Enrollment

As discussed above in section 8.1, the school will seek dual enrollment options with local colleges and community colleges to enable students to pursue their developing career and advanced academic interests. The school will support these students robustly with counseling concerning course opportunities and selection, as well as additional consultations about progress.

College Counseling

In addition to the interest-development, internship, and career components of the Pathways offerings, high-school students will have access as well to the College Advising Advantage (CAA) program in development at schools already supported by Opportunity Education. This program extends college advising across the four years of high school with scaffolded activities, events, and materials. The grade-level focuses of CAA will follow the rough parameters below:

- 9th Grade - Orientation and Goal Setting: Students will be introduced to the program and its objectives. They will participate in goal-setting activities to identify their individual college admission goals.
- 10th Grade - College Exploration: Students will participate in workshops and activities designed to explore various college options, including visits to local colleges and universities.
- 11th Grade - College Preparation: Students will receive guidance on college entrance exams, college selection, and the application process. They will also begin creating a college portfolio, including extracurricular activities, leadership experiences, and community service involvement.
- 12th Grade - 1. College Application Support: Students will receive comprehensive guidance and support throughout the college application process, including assistance with writing college essays, preparing for interviews, and submitting applications. 2. College Admission Strategies: Students will learn effective strategies for college admissions, including scholarship opportunities, financial aid, and understanding admission requirements. 3. Digital Portfolio: Students will compile a digital portfolio of their creative work, showcasing their skills and accomplishments in digital creativity.

It should be stressed that the College Admissions Advantage has the mission of ensuring that all students who wish to pursue college are able to gain entry into their best fit college and that they do so fully prepared to be successful while in college up through completion and beyond. Students wishing to pursue alternative paths (career training, military service, or on the job training) will receive similar support for their pursuits.

Pathways

The Pathways Program is a co-curricular program that provides students with a foundation in professionalism and management while providing opportunities for service leadership through service projects and internships. Students learn how to conduct themselves professionally while also exploring career interests and developing important life skills. Pathways will be provided by Opportunity Education at no additional cost.

As part of the Pathways Program, students in grades 9 and 10 will be offered service learning opportunities in local community-based organizations such as shelters, food pantries, Habitat for Humanity chapters, elder care support organizations, and more. These opportunities will be realized for groups of students. Students in grades 11 and 12 will be encouraged to develop and execute job shadow opportunities, internships and take on part-time jobs as part of identifying and planning their path beyond high school.

13. Proposed Student Recruitment

13.1. Describe the proposed charter school's plan and timeline(s) for recruiting, enrolling, and transferring students, including information about any enrollment preferences and procedures for conducting transparent admissions selections.

This should describe how information related to enrollment and lottery policies will be publicly available and provided to the targeted community(ies).

Quest Forward Charter School Cedar Rapids will leverage an extensive student recruitment and promotional strategy to ensure potential students and families, regardless of their circumstances, have an equal opportunity to apply and register at the school. This approach will focus on all community members, particularly underserved students and families, such as those with limited English proficiency, special physical or academic needs, or those at risk of academic underperformance. The school's targeted initiatives include:

Community Engagement: Marketing for Quest Forward Charter School will begin by hosting public hearings in the community. These meetings will introduce the school to the community, ensuring awareness of the education choice program and the application process, particularly for difficult-to-reach families (single-parent families, low-income households, etc.). Grassroots marketing efforts will be crucial, employing strategies such as community events, informational meetings, door-to-door communication, a comprehensive school website, social media promotion, and community group liaison. The school will also make the community aware of Quest Forward Charter School by leaving flyers in locations throughout the community such as community centers, libraries, restaurants, religious organizations, and community events.

Inclusive Promotional Materials: Advertising material for Quest Forward Charter School will be drafted with language that welcomes all students, regardless of socioeconomic status, ethnicity, native language, or current academic program status. These materials will be available in multiple languages, catering for English Learners (EL) families.

Digital Presence: Quest Forward Charter School will establish a user-friendly website providing information like enrollment timelines, curriculum examples, and registration procedures in multiple languages. The school will also use digital and social media, such as but limited to Facebook, Instagram, and Google, advertising to reach a wider audience.

Community Partnerships and Information Sessions: The school will foster relationships with local community groups and organizations. Collaborative initiatives, including information sessions at community centers, libraries and parks, will aid in awareness and student recruitment near the proposed school. The school commits to hosting at least one information session every month until the enrollment goals are achieved.

Community Word-of-Mouth: Quest Forward Charter School will encourage parents, community partners, elected officials, and local community leaders to disseminate information about the school, its growth, and open enrollment periods within their networks.

Admission Policy - In accordance with federal and state anti-discrimination laws and in accordance with the Iowa Administrative Code 281.19.11(5) the School will not discriminate on the basis of race, ethnicity, national origin, gender, or disability against a student in its school admission process. An open admissions policy will be implemented wherein the School will be open to any student. Any eligible student, as described in Iowa Administrative Code 281.19.11 who submits an application (prior to the posted deadline) shall be considered, unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such cases, all applicants shall have an equal chance of being admitted through a random selection/lottery process. If the number of applicants exceeds the capacity, students not selected in the initial lottery will be placed on a waitlist. The same enrollment preferences will apply if space becomes available for a student on the waitlist. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity.

Enrollment Preferences - In accordance with Iowa Administrative Code 281.19.11(5), the School will give enrollment preference to the following student populations:

- Students who are siblings of a student enrolled in the charter school.

The School Principal will establish a timeline for registration and enrollment which will be posted on the school's website and sent to families who have been selected.

Enrollment Timeline (Approximate Dates)

- Oct 1st, 2024 - Student Registration Begins
- Dec 31st, 2024 - Students who have registered will be officially enrolled. If the number of applicants exceeds capacity, a lottery will be conducted.
- Jan 1st, 2025 - Second Registration Period Begins
- February 28th, 2025 - Students who have registered will be officially enrolled. If the number of applicants exceeds capacity, a lottery will be conducted.
- March 1st 2025- Third enrollment period is ongoing.

Note: in the event that a suitable location is procured early in the timeline laid out in section 22.1, the enrollment timeline may be accelerated to allow for school to open in Fall 2024.

14. Proposed Code of Student Conduct

14.1. Describe the charter school's proposed code of student conduct, including procedures and disciplinary sanctions for both general education and special education students.

This should describe the proposed charter school's philosophy of student discipline, including:

- Which student actions will result in discipline,
- How discipline practices and procedures will be monitored to ensure legal and policy compliance,
- The appeal process that the school will employ for students facing expulsion, and
- How the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.

To provide a top-notch educational experience, it is imperative that the school maintains a safe environment conducive to academic success. Establishing and adhering to the rules and their associated consequences allows students to focus primarily on academic excellence. The Code of Conduct is provided to students and parents before the start of the school year to ensure all are aware of our behavioral expectations and potential consequences.

Disciplinary Strategies

Disciplinary strategies are designed to correct and promote responsibility among students. Teachers and students will use professional judgment to decide on disciplinary action including but not limited to factors such as seriousness of the offense, student's age, frequency of misbehavior, and the impact on the school environment.

The range of disciplinary methods includes:

- Assigning school service or community service
- Developing behavioral contracts
- Allowing a "time-out" or cooling-off period
- Counseling by school staff
- Expulsion as outlined in the Code of Conduct
- Reducing grades per policy guidelines
- In school suspension or detention as outlined in the Code of Conduct
- Out of school suspension as outlined in the Code of Conduct
- Parent-teacher meetings
- Reporting to outside legal authorities alongside school-imposed disciplinary measures
- Changing school-administered probation
- Sending the student to the office or other designated areas
- Temporarily confiscating disruptive items
- Verbal correction
- Removing privileges like participation in extracurricular activities

Corporal punishment is not used as a disciplinary method.

Student Code of Conduct Offenses

Level I Offenses

1. Being in an unauthorized area.
2. Causing an individual to act through the use of threat or coercion.
3. Computer system violations.
4. Damaging or vandalizing property owned by others.
5. Defacing or damaging school property, including textbooks, lockers, furniture, and other equipment, with graffiti or by other means.
6. Disobeying conduct rules regarding school transportation.
7. Disrespect of school staff and persons in authority.
8. Engaging in any misbehavior that gives school officials reasonable cause to believe that such conduct will substantially disrupt the school program or incite violence.
9. Engaging in disruptive actions or demonstrations that substantially disrupt or materially interfere with school activities.
10. Engaging in inappropriate verbal, physical, or sexual contact directed toward another student or a school employee.
11. Engaging in threatening behavior toward another student or school employee on or off school property.
12. Failure to complete assigned homework.
13. Failure to comply with directives of school staff (insubordination).

14. Failure to comply with school dress code policies and grooming standards.
15. Failure to leave campus within 30 minutes of school dismissal (unless involved in an activity under supervision).
16. Failure to report known hazing, harassment, or bullying of students.
17. Improperly discharging a fire extinguisher.
18. Inappropriate behavior (not abusive, threatening, violent).
19. Inappropriate or indecent exposure of a student's private body parts.
20. Inappropriate public display of affection: (Public displays of affection deemed inappropriate by public standards such as lewd or inappropriate—kissing, touching, fondling, holding hands, etc.).
21. Insensitivity to others.
22. Making false accusations or hoaxes regarding school safety.
23. Persistent tardiness (tardy, without excuse, on four or more days within a period of 45 rolling school days).
24. Possessing a razor, box cutter, chain, or any other object used in a way that threatens or inflicts bodily injury to another person.
25. Possessing any electronic devices without permission.
26. Possessing matches, lighters, etc.
27. Possessing aerosol canisters or any other object used to set off fire alarms.
28. Possessing published or electronic material that is designed to promote or encourage illegal behavior or that could threaten school safety; using e-mail or Web sites at school to encourage illegal behavior; or threatening school safety.
29. Refusing to accept discipline management techniques assigned by a teacher or the Principal or designee.
30. Repeatedly violating campus or classroom standards of behavior.
31. Skipping class, detention, or mandatory tutorial sessions.
32. Throwing objects that can cause bodily injury or property damage.
33. Using a skateboard, scooter, and/or roller blades while on campus.
34. Using any telecommunications or other electronic devices, without permission, during school hours.

Disciplinary Consequences (may not necessarily be followed in order and progressive disciplinary measures are not required)

1. After school detention.
2. Grade reductions for cheating/academic dishonesty.
3. In-school suspension.
4. Out-of-school suspension for up to three days.
5. Removal from the classroom and/or placement in another classroom.
6. Restitution/restoration, if applicable.
7. School-assessed and school-administered probation.
8. Temporary confiscation of items that disrupt the educational process.
9. Verbal correction.
10. Withdrawal of privileges, such as participation in extracurricular activities and eligibility for seeking and holding honorary offices, and/or membership in school-sponsored clubs or organizations.

Disciplinary actions may be used individually or in combination for any offense.

Level II Offenses

1. Abusing over-the-counter drugs.
2. Academic dishonesty (cheating or copying the work of another).
3. Being a member of, pledging to become a member of, joining, or soliciting another person to join, or pledge to become a member of a public school fraternity, sorority, secret society, or gang.
4. Bypassing of Internet blocks on school computers or networks to enter unapproved sites.

5. Committing extortion, coercion, or blackmail (obtaining money or another object of value from an unwilling person).
6. Damaging or vandalizing property owned by others, including but not limited to property or facilities, property belong to school employees or other students.
7. Defacing or damaging school property, including textbooks, lockers, furniture, and other equipment, or property of any other person with graffiti or by any other means.
8. Engaging in offensive conduct of a sexual nature (verbal or physical).
9. Failure to comply with conditions of in-school suspension placement.
10. Failure to comply with School medication policies.
11. False accusation of conduct that would constitute a misdemeanor or felony.
12. Falsifying records, passes, or other school-related documents.
13. Fighting/mutual combat.
14. Gambling.
15. Gang-related activity of any kind or nature (behavior that is deemed serious gang-related activity may be elevated or addressed as a Level Three offense).
16. Inappropriate behavior (e.g., violent; threat of being violent; racially, ethnically, or culturally motivated actions).
17. Interference with school activities or discipline.
18. Involvement in a felony offense and the school is notified by the police.
19. Leaving classroom, school property, or school-sponsored events without permission.
20. Making an obscene gesture.
21. Persistent Level I offenses (two or more Level One offenses within a semester).
22. Possessing drug paraphernalia.
23. Possessing or selling look-alike drugs or items attempted to be passed off as drugs or contraband.
24. Possessing or selling seeds or pieces of marijuana in less than a usable amount.
25. Possessing prescription drugs, giving a prescription drug to another student.
26. Possessing, viewing, or distributing pictures, text messages, emails, or other material of a sexual nature in any media format.
27. Refusing to allow lawful student search.
28. Sexual harassment/sexual abuse not defined as a Level III offense.
29. Theft.
30. Threats (nonviolent/verbal or written).
31. Throwing objects not considered an illegal weapon that can cause bodily injury or property damage.
32. Unruly, disruptive, or abusive behavior that interferes with the teacher's ability to communicate effectively with the students in the class.
33. Use of profanity or vulgar/offensive language (orally or in writing).
34. Using the Internet or other electronic communications to threaten students or employees, or cause disruption to the school program.
35. Verbal or written abuse (e.g., name calling, racial or ethnic slurs, or derogatory statements that may disrupt the school environment, etc.).
36. Willful destruction of school or personal property and/or vandalism.

Disciplinary Consequences (may not necessarily be followed in order and progressive disciplinary measures are not required)

1. Any applicable Level I Disciplinary Consequence.
2. Out-of-school suspension for up to five days.
3. Disciplinary actions may be used individually or in combination for any offense.

Level III Offenses

1. Abusing a student's own prescription drug, giving a prescription drug to another student, or possessing or being under the influence of another person's prescription drug while on School property or at a school-related event.
2. Aggravated assault.
3. Aggravated kidnapping.
4. Aggravated robbery.
5. Aggravated sexual assault
6. Any offense listed in Iowa Code, no matter when or where the offense takes place.
7. Arson.
8. Assault.
9. Burglary of a motor vehicle on campus.
10. Capital murder.
11. Commission of a felony offense.
12. Committing or assisting in a robbery or theft, even if it does not constitute a felony.
13. Committing the following offenses on school property or within 1,000 feet of school property as measured from any point on the school's real property boundary line, or while attending a school-sponsored or school-related activity on or off school property:
 - a. Behaving in a manner that contains the elements of an offense relating to abusable volatile chemicals.
 - b. Behaving in a manner that contains the elements of the offense of public lewdness or indecent exposure.
 - c. Engaging in conduct punishable as a felony.
 - d. Selling, giving, or delivering to another person an alcoholic beverage; committing a serious act or offense while under the influence of alcohol; or possessing, using, or being under the influence of alcohol, if the conduct is not punishable as a felony offense.
 - e. Selling, giving, or delivering to another person, or possessing, using, or being under the influence of marijuana, a controlled substance, or a dangerous drug in an amount not constituting a felony offense.
14. Conduct endangering the health and safety of others.
15. Creation or participating in the creation of a "hit list".
16. Criminal attempt to commit murder or capital murder.
17. Criminal mischief.
18. Criminally negligent homicide.
19. Deliberate destruction or tampering with the school's computer data or networks.
20. Engaging in bullying and/or cyberbullying.
21. Engaging in bullying that encourages a student to commit or attempt to commit suicide.
22. Engaging in conduct punishable as a felony listed under Iowa penal Code when the conduct occurs off school property and not at a school-sponsored or school-related event and:
 - a. The student receives deferred prosecution;
 - b. A court or jury finds that the student has engaged in delinquent conduct; or
 - c. The Principal or designee has reasonable belief that the student engaged in the conduct.
23. Engaging in conduct punishable as a felony.
24. Engaging in conduct punishable as a Level III expulsion offense when the conduct occurs off the school's property and not at a school-sponsored or school-related event, and the conduct creates a substantial disruption to the educational environment.
25. Engaging in conduct relating to a false alarm or report (including a bomb threat) or a terroristic threat involving a public school.
26. Engaging in conduct relating to harassment of a school employee, including but not limited to:
 - a. Initiating communication and in the course of the communication making a comment, request, suggestion, or proposal that is obscene;

- b. Threatening, in a manner reasonably likely to alarm the person receiving the treat, to inflict bodily injury on the person or to commit a felony against the employee, a member of the employee's family or household, or the employee's property;
 - c. Conveying, in a manner reasonably likely to alarm the employee receiving the report, a false report, which is known by the student to be false, that another person has suffered death or serious bodily injury; or
 - d. Sending repeated electronic communications in a manner reasonably likely to harass, annoy, alarm, abuse, torment, embarrass, or offend another.
- 27. Engaging in conduct that constitutes dating violence, including intentional use of physical, sexual, verbal, or emotional abuse to harm, threaten, intimidate, or control another person with whom the student has or has had a dating relationship.
- 28. Engaging in conduct that constitutes discrimination or harassment, including conduct motivated by race, color, religion, national origin, gender, disability, or age and directed toward another student or school employee.
- 29. Engaging in conduct that constitutes sexual harassment or sexual abuse, whether by word, gesture, or any other conduct directed toward another person, including a student, employee, or volunteer.
- 30. Engaging in conduct that contains the elements of retaliation against any school employee or volunteer, whether on or off of school property.
- 31. Engaging in the electronic transmission of sexually explicit visual material that:
 - a. Depicts any person engaging in sexual conduct; or
 - b. Depicts a person's intimate parts exposed; or
 - c. Depicts the covered genitals of a male person that are in a discernibly turgid state; and
 - d. Is not sent at the request of or with the express consent of the recipient.
- 32. Engaging in inappropriate or indecent exposure of private body parts.
- 33. Engaging in online impersonation.
- 34. Failing to complete three or more in-school suspension assignments without a valid excuse.
- 35. Felony criminal mischief against school property, another student, or school staff.
- 36. Gang activity.
- 37. Hazing.
- 38. Inappropriate sexual conduct.
- 39. Inciting violence against a student through group bullying.
- 40. Indecency with a child.
- 41. Indecent exposure of body parts.
- 42. Inhalant abuse.
- 43. Issuing a false fire alarm.
- 44. Manslaughter.
- 45. Murder.
- 46. Persistent Level I offenses (four or more Level I offenses committed in any one school year).
- 47. Persistent Level II offenses (two or more Level II offenses committed in any one school year).
- 48. Possessing any prohibited items, including but not limited to:
 - a. A "look-alike" weapon (includes but is not limited to BB guns, CO2 guns, air pistols or rifles, pellet guns, or any other device designed to appear to be a firearm or other weapon);
 - b. A laser pointer for other than an approved use;
 - c. A pocketknife or any other small knife with a blade less than 1.5" in length;
 - d. A razor, box cutter, chain, or any other object used in a way that threatens or inflicts bodily injury to another person;
 - e. A stun gun;
 - f. Ammunition;
 - g. An air gun or BB gun;
 - h. Fireworks of any kind, smoke or stink bombs, or any other pyrotechnic or explosive device;

- i. Mace or pepper spray;
 - j. Matches or a lighter;
 - k. Tobacco products, cigarettes, e-cigarettes, and any component, part, or accessory for an e-cigarette device or accessory to a vapor product; or
 - l. Any articles not generally considered to be weapons, including school supplies, when the Principal or designee determines that a danger exists.
49. Possessing, selling, distributing, or being under the influence of inhalants.
 50. Possessing, selling, distributing, or being under the influence of a simulated controlled substance.
 51. Possessing, smoking, or using tobacco products and/or e-cigarettes at school or a school-related or school-sanctioned activity on or off school property.
 52. Possession, use, transfer or exhibition of any firearm, handgun, improvised explosive device, location-restricted knife, club, or any other prohibited weapon or harmful object (as determined by the school).
 53. Possessing, using, giving, or selling paraphernalia related to any prohibited substance (illegal, prescription, and over-the-counter drug).
 54. Public lewdness.
 55. Releasing or threatening to release “intimate visual material” of a minor or a student who is 18 years of age or older without the student’s consent.
 56. Required registration as a sex offender.
 57. Selling, giving, or delivering to another person or possessing, using, or being under the influence of marijuana, a controlled substance, a cannabidiol (CBD) substance, a dangerous drug, or an alcoholic beverage.
 58. Setting or attempting to set fire on school property.
 59. Sexual abuse of a young child or children.
 60. Sexual assault.
 61. Stealing from students, staff, or the school.
 62. Targeting another individual for bodily harm.
 63. Use, exhibition, or possession of a hand instrument designed to cut or stab another by being thrown, including but not limited to a dagger; dirk; stiletto; poniard; bowie knife; sword; spear; switchblade; assisted-open knife (regardless of length); or as otherwise defined by Board of Director’s policy.
 64. Use, exhibition, or possession of a knife with a blade more than 1.5” in length, including but not limited to switchblade knives or any other knife not defined as a location-restricted knife.
 65. Vandalism or conduct constituting criminal mischief with respect to school facilities or property.
 66. Violating the terms and conditions of a student behavior contract.
 67. Violating the school’s computer use policies, rules, or agreements, such as the Student Acceptable Use policy, and including conduct involving but not limited to:
 - a. Attempting to access or circumvent passwords or other security-related information of the school or its students or employees, and uploading or creating computer viruses, including such conduct off school property if the conduct causes a substantial disruption to the educational environment.
 - b. Attempting to alter, destroy, or disable the school’s computer equipment, data, the data of others, or other networks connected to the system, including conduct occurring off school property if the conduct causes a substantial disruption of the educational environment.
 - c. Using the Internet or other electronic communications to threaten students, employees, or volunteers, including conduct occurring off school property if the conduct causes a substantial disruption to the educational environment.
 - d. Sending or posting electronic messages that are abusive, obscene, sexually oriented, threatening, harassing, damaging to another’s reputation, or illegal, including conduct occurring off school property if the conduct causes a substantial disruption to the educational environment.
 - e. Using e-mail or Web sites at school to encourage illegal behavior or threaten school safety.
 68. Any discretionary or mandatory expulsion violation under Iowa Code.

Disciplinary Consequences (may not necessarily be followed in order and progressive disciplinary measures are not required)

1. Out of school suspension for five–ten days.
2. Expulsion.

Special Rules for Suspensions Involving Homeless Students

The school may not place a student who is homeless in out-of-school suspension unless the student engages in the following conduct while on school property or while attending a school-sponsored or school-related activity on or off of school property:

1. Unlawful possession of a firearm or other weapon;
2. Assault, sexual assault, aggravated assault, or aggravated sexual assault; or
3. Selling, giving, or delivering to another person or possessing, using, or being under the influence of any amount of marijuana or a controlled substance, a dangerous drug, or an alcoholic beverage.

Emergency Placement

If the Principal or designee reasonably believes a student's behavior is so unruly, disruptive, or abusive that it seriously interferes with a teacher's ability to communicate effectively with students in a class, with the ability of a student's classmates to learn, or with the operation of the school or a school sponsored activity, the Principal or designee may order immediate removal of the student. The Head of School or designee may impose immediate suspension if he or she reasonably believes such action is necessary to protect persons or property from imminent harm. At the time of such an emergency removal, the student will be given verbal notice of the reason for the action and appropriate hearings will be scheduled within a reasonable time after the emergency removal.

Conference, Hearings and Appeals

All students are entitled to conferences, hearings, and/or appeals of disciplinary matters as provided by state and federal law and School policy.

Process for Suspensions lasting Up to Five Days

Prior to suspending a student, the Principal or designee must attempt to hold an informal conference with the student to give notice of the suspension recommendation. Additionally, prior to suspending a student for up to five days, the Principal or designee must attempt to hold an informal conference with the student to:

- Notify the student of the accusations against him/her,
- Allow the student to relate his or her version of the incident, and
- Determine whether the student's conduct warrants suspension.

If the Principal or designee determines the student's conduct warrants suspension during the school day, the Principal or designee will make reasonable effort to notify the student's parent(s) that the student has been suspended before the student is sent home. The Principal or designee will notify a suspended student's parent(s) of the period of suspension, the grounds for the suspension, and the time and place for an opportunity to confer with the Principal or designee.

A student shall receive credit for work missed during the period of suspension if the student makes up work missed during the period of suspension within the same number of school days the student was absent on suspension.

Process for Out-of-School Suspensions Over Five Days and Expulsion

Notice: When the Principal or designee determine that a student's conduct warrants suspension for more than five days or expulsion, but prior to taking any expulsion action, the Principal or designee will provide the student's parent(s) with written notice of:

- The reasons for the proposed disciplinary action; and
- The date and location for a hearing before the Principal, within five school days from the date of the disciplinary action.

The notice shall further state that, at the hearing, the student:

- May be present;
- Shall have an opportunity to present evidence;
- Shall be apprised and informed of the school's evidence;
- May be accompanied by his or her parent(s); and
- May be represented by an attorney.

Hearing Before Principal or Designee: The school shall make a good faith effort to inform the student and the student's parent(s) of the time and place for the hearing. The school shall hold the hearing regardless of whether the student, the student's parent(s) or another adult representing the student attends, so long as notice of the hearing has timely been provided. The Principal or designee may audio record the hearing.

Within 48 hours or two school days, whichever is later, following the hearing, the Principal or designee will notify the student and the student's parent(s) in writing of his or her decision as to whether the student's conduct warrants suspension and/or expulsion and, if so, the decision shall specify:

1. The length of the suspension or expulsion, if any;
2. When the expulsion is not permanent, the procedures for re-admittance at the end of the expulsion period; and
3. The right to appeal the Principal or designee's decision to the Board of Directors or the Board's designee.

The notice shall also state that failure to timely request such a hearing constitutes a waiver of further rights in the matter, and that disciplinary consequences will not be deferred pending the outcome of an appeal of an extended suspension or expulsion decision.

Appeal to the Board of Directors: The student or his or her parent(s) may appeal the extended suspension or expulsion decision to the Board of Directors by notifying the Principal in writing within seven calendar days of the date of receipt of the Principal or designee's decision. The student and/or his or her parent(s) will be informed of the date, time, and location of the meeting in which the disciplinary consequence will be reviewed. The Board of Directors will review the disciplinary administrative record and any audio recording or transcription/minutes of any hearings or conferences before the Principal or designee at a regular or specially called meeting in closed session as permitted by the Iowa Open Meetings Act. The appeal shall be limited to the issues and documents considered during the disciplinary consequence, except that if the administration intends to rely on evidence not included in the expulsion record, the administration shall provide the student or parent(s) notice of the nature of the evidence at least three days before the Board of Directors meeting.

The Board of Directors may, but is not required to, allow an opportunity for the student or parent(s) and the administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board of Directors. The Board of Directors will consider the appeal and may request that the administration provide an explanation for the disciplinary decision.

The Board of Directors will communicate its decision, if any, orally or in writing before or during the next regularly scheduled Board of Directors meeting. If no decision is made by the end of the next regularly scheduled Board of Directors meeting, the Principal's or designee's decision with respect to the disciplinary action appeal shall be upheld. The Board of Directors may not delegate its authority to issue a decision, and any decision by the Board of Directors is final and may not be appealed.

As stated above, disciplinary consequences will not be deferred pending the outcome of an appeal of an extended suspension or expulsion to the Board of Directors.

No Credit Earned: Except when required by law, students will not earn academic credit during a period of expulsion.

Discipline for Students with Disabilities

Students with Disabilities (SWD) are also expected to abide by the Student Code of Conduct. The Individualized Education Plan (IEP) Team will address SWD struggling with behavioral issues through IEP goals, related services, and/or conducting a Functional Behavioral Assessment (FBA) to create a Behavior Intervention Plan (BIP). The IEP team will consider the special factor if the student's behavior is interfering with his or her learning or learning of others during this meeting. If the answer is "yes", then the team will consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior. Behavioral instructional supports, interventions and goals will be written into an IEP to help in reducing behavioral problems. For example, FBAs are an important and required element in determining why a student is behaving in disruptive or challenging ways, and BIPs will detail how the problem is to be addressed. The BIP will be implemented before problem behaviors become interfering behaviors and to stop or reduce the problem behaviors so that discipline is not necessary. These supports will ensure SWD whose behavior is impacting participation in the Least Restrictive Environment (LRE) are able to access their Free Appropriate Public Education (FAPE). If discipline is deemed appropriate based on a violation of the Code of Student Conduct, a Manifestation Determination meeting may be conducted. Manifestation Determination is a process to determine if a student's behavior problem was or was not a manifestation of the student's disability. A Manifestation Determination will be completed as part of an IEP team meeting. The IEP team will convene no later than 10 school days when:

- A parent requests such a meeting following a disciplinary incident.
- A student is suspended for 5 or more consecutive days.
- A student is suspended for more than 10 cumulative days in a school (and for every suspension thereafter).
- A change in placement for more than 10 consecutive days is being sought for disciplinary reasons.
- Exclusion or expulsion is being considered.

If the behavior was a manifestation of the student's disability, the student will return to current educational placement and will not be referred to a Student Disciplinary Hearing. The School will review the IEP and BIP to ensure behavioral goals and supports are in place.

Legal Compliance

The school will monitor Iowa State Code and ensure it is updated on an annual basis to align with all state and federal laws.

15. Proposed Organizational Structure

15.1. Describe the proposed charter school's organizational structure. For each position or group in the organizational chart, list the duties and powers.

This should include the position or group titles and, if available, may list specific names.

The School's Board of Directors is the ultimate policy-making body with the responsibility of operation and oversight of the school including, but not limited to, academic direction, curriculum, and budgetary functions. They shall also serve as the final decision-making authority for student disciplinary expulsions, as well as adopting the student code of conduct and family handbook. It shall be the responsibility of the Quest Forward Charter School's Board to establish annual budgets, adopt financial policies. The Board will hire the superintendent/principal and are responsible for hiring the Superintendent/Principals for their school sites. The Board also has the power to fire superintendents and principals.

The directors of the governing board will contribute the wide range of relevant knowledge, skills, and commitment needed to oversee a successful charter school. The Board will meet quarterly, with the last meeting of the fiscal year designated as the annual meeting. Special meetings may be called as needed at the request of the Superintendent to the Chair. All meetings will be conducted as prescribed by the laws of Iowa.

Board Member Positions:

Chair: The Chair of the Board will preside at all meetings of the Board of Directors. The Chair will have other powers and duties not inconsistent with these Bylaws as may be assigned by the Board. The Vice-Chair will have the powers and duties of the Chair in the event of their absence.

Treasurer: The Treasurer shall have oversight responsibility and shall keep and maintain or cause to be kept and maintained adequate and correct accounts of the properties and business transactions of the school, including accounts of its assets, liabilities, receipts, disbursements, gains and losses. The books of account shall at all times be open to inspection by any Board Member. The Treasurer shall be charged with safeguarding the assets of School and they shall sign financial documents on behalf of the school in accordance with the established policies of the school. They shall have such other powers and perform such other duties as may be prescribed by the Board from time to time.

Secretary: The Secretary will act under the direction of the Chair and may have other duties and powers as the Chair of the Board of Directors may assign. The Secretary will keep minutes of regular and special meetings of the board of directors, including without limitation a:

- Record of the members present or not present at the meeting;
- Record of the outcome of a vote; and
- Maintain a permanent record of the minutes.

Board Member Duties: The policies, procedures, powers, and duties by which the board will operate include, but are not limited to:

- Oversee operational policies, academic accountability, and financial accountability.
- Annually adopt and maintain an operating budget.
- Exercise continuing oversight of the school's operations and provide public accountability.
- Hire and supervise a school Superintendent/Principal who will oversee the day-to-day operations of the charter school.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations.
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsoring entity

Quest Forward Charter School's on-site administration consists of the Superintendent/Principal and administrative team – as needed (ex: Assistant Principal, Lead Teacher, Special Education Teacher, etc.), who are responsible for curriculum development, working with the teaching staff, addressing student-related issues, and administering student services programs. The administrative team, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the school. The Superintendent/Principal, with the support of the administrative team, will ensure that the operations of the school (resources, courses, policies) are in accordance with the school's Mission and Vision. The Superintendent/Principal will be evaluated annually by the Board through a process that includes progress toward achieving school goals based on the school's mission and vision, feedback from stakeholders, as well as a review of school data and performance to determine the Superintendent/Principal's success. The evaluation's purpose is to measure the Superintendent/Principal's effectiveness and inform them of successes as well as opportunities for growth, improvement, and professional development.

Attach a copy of the organizational chart to [Appendix F](#).

15.2. Describe the delineation of authority and reporting between the governing board, staff, and any other related bodies or external organizations that play a role in managing the charter school.

The delineation of authority is a matter of local determination, as long as the delineation is clear and unambiguous.

The Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the School including but not limited to academic direction, curriculum, and budgetary functions. The educational leadership and business operations of schools are delivered through both a hired administrator (the school principal) and a contracted Educational Services and Support (ESP) Organization.

The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The school's faculty and staff will report directly to the principal, who shall report to the Governing Board. The School's on-site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School.

The Governing Board is self-governing and independent from the ESP, and no member of the Governing Board is employed by the ESP or related to any owner or manager of the ESP.

The ESP is hired by the Governing Board of the school to perform specific duties, at the discretion of the Board. The ESP does not manage the day-to-day operations of a school, but rather provides “back office” support and independent accountability for the Board. The ESP provides teams with expertise in the areas of business, law, facilities, quality assurance, strategic planning and development, and governmental compliance.

In order to ensure that the ESP is able to deliver a robust complement of pedagogical support, the ESP will contract with an identified Pedagogical Education Service Provider, who will provide a set of services related to teacher professional learning and support, educational software tools, curricular support and analytical services.

The ESP charges a flat annual fee per student enrolled at the school.

An “arm’s length” performance-based relationship exists between the governing board and the ESP. The Board annually evaluates the ESP and determines continuation and renewal of services based on the ESP’s performance.

The ESP is hired by the Board to provide services which support the operations of the school. The principal, as the leader, is the individual responsible for the day-to-day operations of the school. Both the ESP and the principal report to the Governing Board, which has the ultimate authority to hire and fire them. The ESP, at the direction of the Governing Board, provides support and guidance to principals. Principals are hired by and report directly to their Governing Boards. The ESP does not sign off on annual performance evaluations for principals or staff.

16. Proposed Staffing Plan

16.1. Attach proposed charter school's staffing chart for the first year of operation.

	Year 1
<i>Instruction Staff</i>	
Teachers (ESE or ESOL certified teacher)	12
Other Teachers (ESE, ESOL, see Budget Narrative)	2
	14
<i>Pupil Personnel Services</i>	
ESE Teacher/Specialist	1
Guidance Counselor (ESE Certified)	1
	2
<i>Media Services</i>	
Media Specialist	-
	-
<i>School Administration</i>	
Principal	1
Assistant Principal	-
Administrative Assistant	1
Registrar	1
Other Clerical	-
	3
<i>Fiscal Services</i>	
Business Manager	1
	1
<i>Food Services</i>	
Food Service Workers	3
	3
<i>Operation of Plant</i>	
Custodian	2
Security - (in addition to SRO)	1
	3
TOTAL EMPLOYEES	26

16.2. Describe the proposed charter school's staffing plan for the duration of the charter school contract.

This should include how staffing needs will be analyzed and addressed over the duration of the contract and how compliance with licensure requirements through the Board of Educational Examiners will be achieved.

The school will staff the school appropriately as the school continues to grow. The school will add speciality teachers as the programming expands and as the needs of the community change. Please see the chart below to see the projected staffing plan for the duration of the charter.

	Year 1	Year 2	Year 3	Year 4	Year 5
<i>Instruction Staff</i>					
Teachers (ESE or ESOL certified teacher)	12	20	24	28	28
Other Teachers (ESE, ESOL, see Budget Narrative)	2	3	4	4	4
	14	23	28	32	32
<i>Pupil Personnel Services</i>					
ESE Teacher/Specialist	1	2	2	2	2
Guidance Counselor (ESE Certified)	1	1	2	2	2
	2	3	4	4	4
<i>School Administration</i>					
Principal	1	1	1	1	1
Assistant Principal	-	-	1	1	1
Administrative Assistant	1	1	1	1	1
Registrar	1	1	1	1	1
Other Clerical		1	1	1	1
	3	4	5	5	5
<i>Fiscal Services</i>					
Business Manager	1	1	1	1	1
	1	1	1	1	1
<i>Food Services</i>					
Food Service Workers	3	4	4	4	4
	3	4	4	4	4
<i>Operation of Plant</i>					
Custodian	2	2	3	3	3
Security - (in addition to SRO)	1	2	2	2	2
	3	4	5	5	5
TOTAL EMPLOYEES	26	39	47	51	51

See 17.1 to see how recruitment will take place to ensure licensure requirements are met.

17. Proposed Recruitment and Development of Administration, Staff, and Governing Board

17.1. Describe how the proposed charter school will recruit and develop school administrators, staff, and governing board members.

This should describe information, such as:

- Recruitment policies;
- How open positions will be advertised in the community(ies);
- Ongoing professional learning that will be provided to administrators, staff, and governing board members; and
- Plans for mentoring and induction for [teachers](#) and [administrators](#).

Recruitment – The School will ensure that faculty members are certified, highly qualified professional personnel. Accordingly, the School will: Recruit teachers through various local and national job fairs and teacher fairs, coordinate efforts to partner with postsecondary educational institutions to serve as host school for interns whenever possible, and organize other efforts to attract in-field experts to serve as teachers in the various disciplines that require higher levels of academic content delivery. Recruitment efforts will also include advertisements in local newspapers, online job postings, on the school’s website, and presentations and fliers at local universities and via word of mouth.

Selection Process – The school will look for candidates who demonstrate the following qualifications: Educational background: Bachelor’s Degree or higher in field; State Certification for the required position; Excellent presentation and interpersonal skills; Satisfactory recommendation and/or evaluations from previous employer; Personal characteristics, knowledge, and belief in the school’s mission; An ability and motivation to work as part of a team in a small-school setting with parental involvement, and; References/Letters of Recommendation.

Hiring Process – The Principal, once hired, will recruit teachers and may appoint a committee to screen highly-qualified and certified teachers. This committee develops an interview questionnaire for specific positions, conducts initial screening interviews and makes recommendations to the principal. The principal reviews recommendations, conducts final interviews, and makes all final hiring decisions within the scope of the budget, as approved by the Governing Board.

The school will not employ an individual to provide instructional services if the individual's certificate or license as an educator is suspended or revoked by this or any other state. The school agrees to fingerprint all employees, all employees agree to background checks, and drug-screening. The School will adhere to the anti discrimination provisions of Iowa Code. Furthermore, the school will not discriminate based on actual or perceived disability, gender, nationality, race or ethnicity, religion, sexual orientation in the hiring of its employees.

Board Member Training – The administrators and Governing Board members will be trained in the areas of Non-Profit Board Governance, Iowa’s Open Government Requirements, the Iowa Sunshine Law, and the Iowa Public Records Law. Further, as presented in the Applicant’s Bylaws, The Applicant shall develop an orientation and training program for new directors and an annual continuing education program for existing directors.

Administration Development Plan – Opportunity Education leadership will be responsible for leadership training of the school principal. Opportunity Education will also identify the best practices across any other charter schools opened concurrently and will subsequently plan the dissemination of those best practices throughout the Opportunity Education network, as applicable.

Site-specific Instructional Coaches or Lead Teachers, will oversee the implementation of professional learning services of all Opportunity Education schools in a commitment to provide continuous improvement and learning and subsequently for the Opportunity Education Network.

Opportunity Education leadership will also seek and disseminate information about PD that is purposeful and relevant to the continuous growth of the school and subsequently the entire network of schools. At a minimum, administrators are expected to participate in the following professional development trainings and conferences:

- Teacher Evaluation Training for Administrators – Training on the Instructional Performance Evaluation and Growth System (IPEGS) to inform teachers on how their teaching performance will be evaluated.
- Classroom Walk-through Training – Provides school leaders with strategies and tools to effectively structure classroom visits and follow-up reflection. Reflective thinking about one's practice provides an effective strategy for change and improvement by fostering a process of communication between the instructional leaders and the teacher to increase the focus on student achievement. The process provides a powerful strategy for increasing student achievement; a strategy for classroom visits that focuses on teaching and learning; methodology for analyzing the classroom for feedback purposes, and the use of reflective conversation for providing feedback.
- Budget Training for Administrators – This training addresses school budgeting as it pertains to both the School's operating budget and internal accounting policies and procedures, Financial and Program Cost Accounting and Reporting requirements and checks and balances to ensure a sound budget.
- Master Scheduling for Administrators – Administrators are trained on creating an efficient and effective master schedule that meets the national, state and district course requirements, is financially sound, and that meets class size requirements.
- Developing a plan for school's improvement – This training assists school administrators to develop a sound and effective improvement plan to ensure continuous improvement. This process includes data analysis, goal-setting, budget planning, professional development planning and reflective practices.
- Principal Chat Sessions – Charter School Administrators meet by level (secondary, elementary) to go over pertinent topics and to share best practices. These sessions include curriculum development, standards implementation, scheduling, educational changes, innovative programs, and more. Experienced administrators share their best practices for using student achievement data with newly appointed assistant principals.
- Opportunity Education Principal Meetings – Opportunity Education School principals (and administrators) come together, at least quarterly, and work as a professional learning community. They look at student performance data, share best practices, and plan for and ensure continuous improvement.

Staff Development Plan – In setting high expectations for both students and teachers, the School will be committed to maintaining the level of high quality instructors by implementing a comprehensive professional development plan. The school will support the professional development needs of all professional staff by subsidizing college classes, facilitating the attainment of continuing education credits, and offering trainings.

The professional development trainings that will be offered prior to the School opening will include the School Mission/Vision, Curriculum (English Language Arts, Mathematics, Science, Social Studies and Special Areas/Electives), Technology Based Programs, Classroom Management, Best Practices, Data Analysis and Dissemination, Writing Across the Curriculum, School Literacy Plan, Differentiated Instruction, Response to Intervention (RtI), ESE/ESOL, School Discipline Plan, Grading Procedures, Observation Tools, Guidance/Student Services and School Policies and Procedures.

During the induction period, two separate groups will be formed based on returning teachers and new hires to the school. Teachers entering the school as a new hire will participate in initial onboarding as well as the new teacher Mentoring Program. In the teaching Mentoring Program, new teachers will be paired with experienced teachers, and will receive training on the strategies and techniques that constitute the Quest Forward learning methodology. Coupled with this program, new hires and returning teachers will attend the professional developments trainings covering the topics stated above.

Professional Learning will be organized each year around a recurring calendar of Professional Learning events. Each summer will begin with the Summer Institute in which new and returning teachers review the core elements of Quest Forward learning, such as active learning and the feedback process as well as software tools such as feedback forward.

Throughout the year additional opportunities are presented such as term-based professional development days, grab and go professional development for teachers to use on demand on and as needed basis. Also available are more comprehensive professional learning opportunities for which teachers can earn continuing education credits.

Instructional personnel will be prepared to deliver instruction after the completion of the professional development trainings listed below:

- School Mission/Vision – All personnel will participate in the school-wide mission/vision discussion and learn the School's program and philosophy. This training will, for instance, emphasize elements of the mission and vision regarding active and engaged learning, as well as those casting the school as a launch pad advancing students beyond the school into a range of learning opportunities.
- Core Curriculum - Teachers will participate in department trainings and meetings with an emphasis on state standards requirements, district pacing guides and proper lesson plan components.
- Technology Based Programs – Teachers will attend hands-on training in all technology programs being offered at the School and learn how to effectively integrate technology.
- Classroom Management - Procedures, strategies, and instructional techniques that teachers will utilize to manage student behavior and maximize potential of learning activities.
- Best Practices – The School will address best practices and provide delivery techniques and strategies in all areas of curriculum with the focus on student achievement, skills-forward learning, and personalization of each student's learning pathway.
- Data Analysis and Dissemination – Administrators and teachers will collaborate in analyzing and disaggregating school data from the previous school year in order to address the needs of the students to ensure academic success.
- Writing Across the Curriculum – Instructional personnel will learn how to use strategies to increase student's critical thinking skills by requiring them to write in all of their courses. Writing Across the Curriculum will require students to take in information, organize their thoughts, sort through all the information they've received and then process it.
- School-wide Literacy Plan – Teachers will be exposed to the School's literacy plan on how to differentiate and individualize instruction in order to create effective targeted instructional lessons and/or tutoring sessions that will increase student achievement.
- Differentiated Instruction – Teachers will learn how to effectively use tailored instruction to meet the individual needs of students providing different strategies of learning in the classroom.
- Response to Intervention (RtI)/MTSS – Instructional staff will learn how to implement the framework to effectively meet the academic and behavioral needs of all students.
- Students with Disabilities Education (SWD)/English Language Learner (EL) – Teachers will be guided through the procedures and documentation of any student participating in the ESE and/or ELL program

as well as receive training on additional strategies to provide the necessary accommodations and/or modifications as stated on the students' individual plan(s).

- School Rules and Classroom Discipline Plan – The Sponsor's Code of Student Conduct, School Rules will be outlined and discussed, so these can be implemented with fidelity throughout the school year. The Response to Intervention for Behavior/Multi-Tiered System of Supports model (RtIB/MTSS), will also be explained so faculty is aware of the problem-solving process and how the continuum of tiered interventions with increasing levels of intensity and duration (to prevent inappropriate behavior and reinforce appropriate behaviors) ought to be implemented.
- Grading System – The teachers will receive training on the school grading system to include access to the grading system, how to utilize the portal, attendance procedures, weekly grade minimums, grading averages, inputting of grades, monitoring student academic achievement and notification to parents of student deficiencies.
- Observation & Feedback Tools – Teachers will understand the observation process and tools utilized for teacher performance and evaluation. In addition, the classroom walkthrough rubric will be provided to the instructional staff to ensure effective implementation of rigor within the curriculum.
- Guidance/Student Support – Teachers will be informed regarding the process and procedures to follow when requesting guidance or student support.
- School Policies and Procedures – Instructional personnel will receive detailed information of the School's policies and procedures to include but not be limited to arrival and dismissal procedures, faculty handbook, emergency procedures, safety and security training, account procedures for the collection of monies, meeting dates, school calendar and activities of events.

Teachers will be required to demonstrate how they've incorporated learned instructional techniques during the delivery of their lessons. The administration will monitor implementation of the curriculum and instructional strategies through various methods including formal observations, daily classroom walkthroughs, and ongoing analysis of student performance data.

Appropriate and relevant school-wide training will occur on teacher planning days throughout the year as well as on late start dates. The Professional Learning Team and on-site instructional coaches and professional learning coordinators will provide the faculty with the exact dates that would be utilized for professional development. The school-wide professional development plan will involve ongoing, sustained, learning that occurs at least weekly throughout the school year. A focus of the program is on investigation and practical application that prioritize tangible takeaways that teachers can bring directly into their practices. This type of professional learning provides focused, deep learning that builds upon prior learning resulting in positive changes in practice and increased student learning. In addition, it engages teachers themselves in active learning through construction and creation during the sessions. A needs assessment will be conducted by the School on a whole school level, or by grade, subject, team, Professional Learning Communities (PLC) or individual levels (Opportunity Education will also conduct a needs assessment across any additional schools in its network, to identify trends and allocate resources to remedy deficiencies if necessary). The Professional Development Plan will be reviewed regularly and updated to reflect staff learning and changes based on student data, as well as gauge the overall effectiveness of the professional development.

Retention of Staff – The School wishes to provide the best benefits and employee services possible. Our experience has shown that when employees deal openly and directly with supervisors, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that the School will amply demonstrate their commitment to employees by responding effectively to employee concerns. The school's plan for professional development also serves to enhance each employee's experience at the school. The school offers teachers and staff opportunities for growth and advancement through participation in the Aspiring Assistant Principal and Aspiring Principal program.

The school will provide a wide range of benefits such as Flexible Benefits Plan; Retirement/401(k) Savings Plan; Bereavement Leave; Dental Insurance; Family Medical Leave; Financial Counseling; Health Insurance; Holidays; Life Insurance; Long-Term Disability; Sick Leave; Vision Care Insurance to ensure the retaining of qualified and capable staff.

Other programs include: Educational Assistance/Tuition Reimbursement: The educational assistance program encourages personal development through formal education so that employees can maintain and improve job-related skills or enhance their ability to compete for reasonably attainable jobs within the School. Employee Assistance Program: Through the EAP, the school will provide confidential access to professional counseling services for help in confronting such personal problems as alcohol and other substance abuse, marital and family difficulties, financial or legal troubles, and emotional distress. Flexible Spending Account (FSA): A Flexible Spending Account (FSA) program that allows employees to have pre-tax dollars deducted from their salaries to pay for eligible out-of-pocket expenses for predictable unreimbursed health care expenses and dependent care expenses during the plan year.

Support for Beginning and Struggling Teachers: Observation of new and struggling teachers by veteran teachers and external evaluators, as well as appropriate support strategies will be implemented as applicable.

17.2. Attach the proposed charter school's employment policies, including performance evaluation plans to [Appendix G](#).

This should include hiring policies and a plan or form for [educator evaluation](#) and address compliance with applicable state and federal employment policies.

18. Proposed Governing Bylaws

18.1. Attach the proposed governing bylaws for the proposed charter school to [Appendix H](#).

19. Partnerships or Contractual Relationships

19.1. Does any independent founding group or proposed governing board member have a partnership or contractual relationship with an education service provider related to the proposed charter school's operations or mission (Mark either yes or no)?

"Education service provider" means an education management organization, charter school management organization, or other person with whom a charter school contracts for educational program implementation or comprehensive management" [Iowa Code § 256E.2(4)].

☒ Yes (must complete 19.1.1)

☐ No (skip to 20.1)

19.1.1. If yes, state the name(s) of the education service provider(s). For each provider listed, explain the partnership or contractual relationship.

Academica is one of the nation's longest-serving and most successful education organizations. Academica works with over 180 academically successful and fiscally sound charter schools. Academica also serves the largest number of high-performing schools of any charter school service and support organization in the United States. Founded in 1999, Academica supported one of the first charter schools in Florida and was also the first company in the state to seek AdvancED accreditation for the schools it serves. All Academica-supported schools are either fully accredited or in the process of obtaining accreditation.

With central headquarters in Miami, Florida, Academica has local offices throughout the country. Academica works with communities and charter school entities to provide educational programs from pre-kindergarten through high school students. Academica has celebrated over 20 years of success serving charter schools in Florida, Arizona, Georgia, California, Colorado, Idaho, South Carolina, North Carolina, Nevada, Texas, Wyoming and Utah. Academica's mission is to facilitate each Governing Board's vision to implement a quality educational program for all children.

The Academica Network has expanded from the traditional K-12 educational mold into a K-16 network, providing even the neediest students with access to a free, high-quality education. The Academica community includes a multinational digital learning community and a non-profit college, giving students access to college courses whether it is at their brick and mortar school or via a virtual web portal. Through the use of technology and the implementation of groundbreaking educational initiatives, the Academica Network is able to put education at the fingertips of any child.

Academica supported online learning for the schools within its network during the COVID-19 school closures. Despite school closures due to COVID-19, Academica-supported schools kept their doors open — online. Well before closing, Academica assisted schools in surveying their families to ensure they had Internet service and devices. Families in need received devices and help with Internet service. Academica's digital learning branch, Academica Virtual Education, provided online classrooms for all teachers through a secure platform, Colêgia. The online platform connected every child with their classroom teacher — live. Thousands of teachers were trained the weekend before the schools reopened in order to fully implement the online learning platform. Students learned together with their classmates as they would in the classroom.

Academica has extensive experience building new school campuses, retrofitting existing buildings for educational use, and collaborating with national real estate development companies to provide schools in new housing communities. Many facilities have been recognized for "Outstanding Educational Design" by *The American School & University*, a national publication on educational facilities. Academica has extensive experience obtaining financing for charter school facilities. Academica works with a network of banks and real estate investment institutions to provide financing and facilities to charter schools.

Academica is able to assist the schools in giving students a rich learning environment through community partnerships. Local governments and municipalities, museums, consulates and foreign governments work seamlessly with client schools to develop these institutions. These partnerships assist the school to identify high quality staff, create unique educational environments, develop successful academic programs, and graduate well-rounded students. By including new client schools in an existing network of nearly 200 schools and over 100,000 students throughout the country, Academica is able to assist school boards in the implementation of successful charter school practices indicative of success with predominantly minority student populations. These strategies and practices provide new schools with a support network that will afford each the ability to maintain thriving, financially viable, and academically high performing programs. Academica's experienced team of professionals provides services and solutions for every aspect of charter school establishment and operation. This team's experience coupled with the success of the school's in the network, proves Academica's organizational capacity to support the proposed school.

ESP Business Services include, but are not limited to:

- Financial Reporting and Records Management
- Bookkeeping and Accounting Services
- Human Resource Administration
- Grant Solicitation
- Governmental and Regulatory Compliance
- Facilities Development and Financing
- Insurance and Legal Compliance
- IT and Website Development – The ESP will work with the School to determine IT needs and desired programs
- Community Relationships and Marketing – The ESP and the school work together to establish relationships within the community the school serves with organizations and individuals whose involvement will further the mission of the school.

The school will enter into an arms-length ESP service, support and licensing agreement with Academica. This agreement focuses on establishing the school's brand and programs and other services relating to school operations.

Academica will in turn enter into a contract with Opportunity Education for services in support of the school's pedagogical mission and vision. Drawing on its experience fostering an active and engaged learning experience for all students through training and resources for teachers, Opportunity Education will provide services and training including but not limited to the following:

- Pedagogical strategies
- Course design
- Instructional materials and recommendations
- Data analytics
- Service recommendations and evaluation
- Training references
- Software tools and recommendations

This contract will be a similar per student basis, and the costs are included in the total agreement with Academica.

The three founding group members all have long standing relationships with Opportunity Education. Joe Ricketts is the Founder, CEO, and sole funder of Opportunity Education. Manuel Mattke serves as the Chief Operating Officer and President of Opportunity Education. Ray Ravaglia serves as the Chief Learning Officer of Opportunity Education.

20. Proposed Transportation, Food, Operational, and/or Ancillary Services

20.1. Describe the proposed plan for providing transportation services.

This should describe:

- Bus inspection,
- Bus safety,
- Driver training,
- Planned routes, and
- Transportation charges.

The school will not be providing transportation services at first. If transportation is needed, funds will be allocated to provide alternate transportation. Transportation services will be provided to students with an IEP who require it as a related service to access their education. In addition, students that are identified as temporarily displaced will be provided transportation options under the McKinney-Vento Act.

20.2. Describe the proposed plan for providing food services.

This should describe:

- How the school will provide nutritious lunches to children,
- If the school will participate in the National School Lunch Program, and
- Its process for income eligibility and verification.

An organized, healthy meal service that meets local health, state and federal regulations and adheres to 7 CFR Parts 210 and 220 will be offered at the school site. Healthy, well-rounded, nutritious meals will be provided in accordance with The Healthy, Hunger-Free Kids Act of 2010 and the USDA Dietary Guidelines of meal component and portion size requirements. The School will participate in the free/reduced price meal program and will provide free and reduced priced meals for eligible children. Eligible children are children from households with gross incomes within the free and reduced limits on the Federal Income Guidelines. All Healthy meals will be distributed to students using a point of sale accountability procedure.

The school will participate in the National School Lunch Program (NSLP). The school will either prepare its own food, in which case the school will have a food service preparation area with all of the necessary equipment for preparing and holding the food, or the school will contract an outside provider to provide the food and equipment necessary for holding the food at required temperatures.

The school will implement a Verification plan and during the verification period, the confirmations of eligibility for free and reduced priced meal benefits under the National School Lunch Program are completed. Verification includes income documentation or confirmation that the child is included in a currently certified Temporary Assistance to Needy Families (TANF) assistance unit, SNAP. Verification efforts are not required for students who have been directly certified, homeless certified, and migrant certified or designated as a runaway youth. Directly certified students, migrant children, homeless and runaway youth are granted automatic eligibility for free meal benefits.

The School will process all necessary lunch applications; adhere to program operation and record keeping requirements. The School will implement the following procedure for processing Free/Reduced Lunch Applications: 1) Disseminate lunch applications to all students upon enrollment; 2) Collect lunch applications and determine applications published in the Federal Register by Food & Nutrition Service, USDA; 3) Enter determinations for each child into the district mainframe or report the information to the state as required; 4) Provide students with notice of eligibility; 5) Serve/Charge student lunches in accordance with determined

eligibility; 6) Submit claims for reimbursement within 30 days of the following month for each approved month of the school year once approved by the NSLP.

The school will adopt a Procurement Policy for the purchasing of food services.

20.3. Describe the proposed plan for all other operational or ancillary services.

This may describe:

- School facility maintenance,
- School business and finance,
- Technology, and
- Safety and security.

The board will enter into an ESP agreement with Academica, who will in turn enter into an agreement with Opportunity Education regarding oversight and support for the pedagogical matters covered by the Academica agreement. Collectively, these agreements will cover all back office support services, including, but not limited to:

- Professional development that is aligned to the Opportunity Education model and Iowa Educational Standards
- Research-based lesson planning assistance
- Professional Development for School Leader and Teachers
- Leadership training and workshop programs
- Compliance and operations support
- Access to ESP best practices for support and instruction on educational technology
- Make available proprietary materials and educational programs
- Assistance with board meeting coordination and minute taking
- Bookkeeping and Record Keeping
- Staff Administration and Human Resources Coordination
- Financial projections and financial statement preparation
- Grant Solicitation
- Financial Solicitation
- Facilities Services: identification of facility, enhancements & retrofit
- Strategic Planning Support
- Procurement/Purchasing Services Support
- Virtual Education Support
- Branding and Marketing
- Safety, Security and Crisis Management
- IT and Website Development – The ESP will work with the School to determine IT needs and desired programs
- Pedagogical strategies
- Course design
- Instructional materials and recommendations
- Data analytics
- Service recommendations and evaluation
- Training references
- Software tools and recommendations

21. Proposed Family and School Partnerships

21.1. Describe how parents and guardians will be given opportunities to be involved in the proposed charter school.

This may describe:

- How input and feedback from parents will be requested and used,
- How family-school partnerships will be used to strengthen support for learning,
- Volunteer activities the school will seek or offer to parents,
- How the school will conduct parent-teacher conferences and provide other opportunities for parents to communicate with their child's teacher, and
- How the school will communicate with families that do not speak English.

The school believes that parent engagement in their children's education is a vital support for learning and a resource to both learners and the work of the school. The importance of this partnership is reflected in the five principles of learning that are part of the school's vision. Accordingly, the school plans a variety of points of contact and engagement with families and will remain open to other possibilities.

A foundation for engagement with families is regular communication regarding student activity and growth. The school is in a position, through the rich and frequent feedback generated from low-stakes formative assessments of student work and skill growth, to provide robust information to parents about ongoing progress. This information may include (1) automated weekly reports on student activity—what have students been working on and what learning objectives are advanced in this work; (2) quarterly end-of-term reports summarizing progress and documenting areas of needed growth; (3) semester- year-end reports including these performance summaries as well as narrative comments on student work and growth. In addition, families will have access to a family-view of student progress through the LMS. All of these communications are designed to support informed communications between teachers and families as well as students and families regarding ongoing work in school, while focusing on activity and trends rather than an absolute priority on grades. The goal of communication through these pathways is to seed productive conversations through actionable and concrete information, rather than simply to raise flags about lagging grades.

Beyond these scheduled reports and access to student performance, various individualized communications are also supported. Parent-teacher conferences will be held in the Fall and by arrangement in the Spring and will be strongly encouraged for middle school and new high school students. Teachers are available to parents for communication as needed. However, teachers or appropriate counselors will also reach out to parents as need arises. In addition to their own insight into student performance, teachers and other administrators will be able to draw on automated indicators of performance trends recommending attention, including declining engagement trends or other quantitative signs of detachment from schoolwork.

While clear communication with families regarding individual students' progress and needs is the foundation of a school's partnership with families, the school also plans to engage families in the school's continuous improvement process. An annual survey about key aspects of the school's programs will be a broad basis for providing input and measuring the efficacy of operational initiatives. In addition the school will form a collaborative organization for families that acts to support students, teachers, and the school through organization of activities and events, including social activities, limited fundraising, and informational events for new and future families. Connected programs will involve identifying parent (and student) ambassadors to speak to prospective families about the school. Finally, a second group of family and community members will work with staff and administrators to periodically review school data and provide solicited input on improvement initiatives and priorities for allocation of discretionary funds.

The school will survey parents' primary language as they register. The school will offer school-to-parent communications in those languages, for example, in Spanish. If a school employee is not available to translate (a notice or in a live meeting), then translation services will be considered. Written communication will be translated in the languages represented at our school.

22. Start-Up and Five-Year Plans

22.1 and 22.2 should be distinguished from each other.

22.1. Describe the school start-up plan that includes information, timeline(s), and the individual(s) responsible for each of the following items:

- **Finances;**
- **Budget;**
- **Insurance coverage; and**
- **Facility construction, preparation, and contingencies.**

Finance and Budget

The Governing Board has the ultimate responsibility to ensure that the School's finances are managed properly. The Board will contract with an Education Service and Support Provider (ESP), which will assist the Board and the School Principal with the preparation and reporting of the School's finances.

The School will establish sound financial policies and accounting procedures to safeguard its finances. The Governing Board shall annually adopt and maintain an operating budget, retain the services of a certified public accountant or auditor for the annual independent financial audit and review, and will approve the audit report, including audit findings and recommendations. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained. The Governing Board of the School will also review and monitor the financial statements of the School on at least a quarterly basis during regularly scheduled Board Meetings.

Controls - The Board of Directors is responsible for establishing and maintaining a system of internal controls in order to provide reasonable assurance that the school's assets are safeguarded against loss from unauthorized use or disposition, and that transactions are executed in accordance with the school's authorization and recorded properly in the financial records. Specifically, the Board will establish controls in accordance with all applicable federal, state and local laws and in line with accepted industry standards and best practices regarding:

- Revenues, accounts receivable, and cash receipts
- Expenditures, accounts payable, and cash disbursements
- Budgeting and financial reporting
- Risk management
- School inventory & capital assets
- Student records
- Employment records

Standard procedures utilized to ensure sound internal accounting and a system of checks and balances include:

General Accounting - utilization of accepted state codification of accounts pursuant to the *Financial and Program Cost Accounting and Reporting* in all transactions pertaining to its operations.

Internal accounting procedures for the School pertaining to receivables and disbursements are as follows:

For receivables, all cash payments will be logged, coded by source and deposited in a timely manner. Deposits are reconciled to cash receipt logs. Disbursements will be made only to approved vendors and must be appropriately authorized. Disbursement packages are prepared at the School site and authorized by the School Principal. Disbursement vouchers are submitted to the ESP with appropriate supporting documentation to substantiate the nature, account classification, business purpose and amount. Disbursement packages are reviewed and approved by the Principal and the ESP. For internal accounts, all disbursements require two signatures. For operating and lunch accounts, disbursements require two signatures for any check in the amount of \$10,000 or above. Checks in the amount of \$25,000 or above require that one of the signatures be that of the Board Chair, with the exception of certain previously board-approved expenses such as facility leases, inter-entity shared expense reimbursements, and other contracted services. Authorized signatures on checks are limited to the Chair of the Governing Board, the President, the School Principal/designee, ESP representative, and others, as approved by the Governing Board.

Bank statements will be reconciled on a monthly basis. The School will provide regular financial statements to the Sponsor including a statement of revenues and expenditures and changes in fund balances, prepared in accordance with generally accepted accounting principles. These will be provided on the dates required by the School Board in the charter school contractual agreement between the School and the Sponsor.

Wire Transfers - copies of all wire transfers (e.g., FTE funds, grants, charter school capital outlay) into the school's banking account(s) along with supporting documentation are maintained and recorded in the general ledger by journal entry.

Internal Revenue Collection - funds collected at the school (i.e., lunch monies, fundraisers, field trips) will be initially collected by designated school staff. These funds along with supporting documents are submitted to the Financial Manager/Treasurer whose responsibility is to record and prepare the deposit. All deposits will be prepared in duplicate; the original goes to the financial institution and the copy remains intact in the deposit book. A copy of the financial institution validated receipt along with supporting documentation will be maintained.

Capital Expenditures - purchase orders are required for all capital expenditures and are pre-approved by the Executive Director, Principal, or Designee. Limits are set by the Board of Directors and may change as necessary. These purchase orders are sent to the vendor and ESP, and copy retained at the school on file in the Accounting Office. Any purchase order totaling more than the limit as set by the Board of Directors requires Board action.

Operational Checking Accounts - all expenses related to the operations of the school are paid from the operating account. All operating expenditures are subject to the same approval processes as indicated for capital expenditures. All accounts are reconciled on a monthly basis.

Authorized Check Signers - authorized signers on school accounts are limited to certain specified individuals as approved by the Board of Directors.

Segregation of Duties relating to financial controls – The school principal will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The school's on-site administration/faculty and staff will report directly to the Principal, who then reports to the Governing Board. The ESP, contracted by the board, will provide bookkeeping, and financial forecasting services to the Governing Board for its oversight and approval.

The Board, at minimum, will be responsible for:

1. reviewing and approving a preliminary annual budget prior to the beginning of the fiscal year;
2. reviewing quarterly financial statements, which include a balance sheet and statement of revenue, expenditures and changes in fund balance, at each public board meeting;
3. annually adopting and maintaining operating budget for the school;
4. retaining the services of a certified public accountant/auditor to conduct the annual independent financial audit;
5. reviewing and approving the audit report, including audit findings and recommendations;
6. reporting to all applicable legal agencies including the charter school's sponsor;
7. overseeing the school's principal and all financial matters delegated to the principal; and
8. reviewing and approving the monthly financial statements submitted to the school board. The governing board may review/approve all monthly financial statements for the months between two successive board meetings. The governing board will record the review/approval of these statements (month/year indicated) in its minutes.

All expenditures, with the exception of exempt items as listed in the board's Financial Policies and Procedures manual, require a purchase order, which is approved by the School Principal. Expenditures are incurred based on the board-approved annual budget. Expenditures outside of the board-approved budget that exceed \$10,000 must be presented to the board for approval and inclusion in the budget.

Invoices are received by the ESP, linked to the approved purchase order, and routed to the School Principal for approval. Upon approval, payment may be processed by the Accounts Payable Representative. Disbursements for approved invoices (checks/ACHs/wire transfers) are approved by the ESP's Chief Financial Officer. Second signatures from authorized signers on the bank accounts are obtained based on the established dollar thresholds.

Bank statements are reconciled by the Financial Specialist. The person processing payments shall not be the same person to reconcile the bank statements. The person processing payments and reconciling bank statements shall not be an authorized signer on the bank accounts.

The Board of Directors selects an external independent audit firm through a formal RFP process. The selected firm performs an independent examination of financial statements and internal controls on an annual basis for the period ending June 30th.

The Principal will manage the day-to-day operations and site-based finances, including expenditures and receivables. The Board will adopt a policy whereby the Principal will need to seek prior approval from the Board for expenditures over a pre-approved amount. The Principal will report at least quarterly to the Governing Board on the progress of the site-based budget and make recommendations and seek approval for large expenses. The Governing Board will oversee the Principal and remain responsible for all financial matters delegated to the Principal.

Financial Policies will be passed at the inaugural governing board. The initial budget will be approved one month after the inaugural board meeting.

Insurance

The School will maintain insurance coverage limits that either meet or exceed the District minimum insurance limit requirements. The School's insurance shall cover the School (and its subcontractors, to the extent that it is not otherwise insured) for those sources of liability which would be covered by the latest edition of the standard Workers' Compensation Policy.

Minimum Limits: There shall be no maximum limit on the amount of coverage for liability imposed by the Iowa Workers' Compensation Law. The insurance carrier has AM Best financial rating of A XII, with over \$1 billion in retained earnings according to AM Best. Insurance will be chosen by July prior to the school opening.

Facilities

The Board plans to engage an experienced charter school facilities developer to acquire, design, plan and construct facilities for lease, which are appropriate to the needs of the School. The School would need a one or multi-story structure built or renovated to meet all requisite codes and life-safety regulations set forth by the applicable governing agency.

Size and Layout of Space: The facility will have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed facility will include program elements such as traditional classrooms, art, science and computer labs, multimedia instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

The Governing Board will direct its ESP to bring to the Board a recommendation for a quality educational facility to be leased by the School.

Projected Schedule

Ongoing	Facility Identification
Feb-August 2024	Facilities Negotiations upon charter approval by Sponsor
August 2024-June 2025	Execute Lease/Conduct Maintenance and Repairs
June-July 2025	Final Preparations of Facilities
July 2025	Conduct Final Facilities and Safety Inspections

In the event that a facility can be procured early in the projected timeline, efforts to accelerate the process may be undertaken to allow for the school to open for Fall 2024.

The ESP has extensive experience in identifying facilities and facilities developers and has successfully assisted other charter school applicants in securing state-of-the-art charter school campuses. The ESP works with reputable and experienced charter property developers, who have access to a network of financial institutions ready to commit the necessary capital for build-to-lease facilities. The developers have also demonstrated abilities in securing the necessary local governmental approvals for charter school purposes and required financing. They have relationships with award-winning design and engineering firms, as well as contractors with a track record of timely completion of excellent facilities meeting the needs of the School.

The School's Governing Board expects to finalize negotiations with a potential landlord prior to charter contract negotiations with the Sponsor. If unsuccessful, negotiation will commence immediately with an experienced developer. The Governing Board will require periodic updates from its ESP concerning the progress that is

being made in final identification of a suitable site and developer to acquire, construct and lease the facilities. In the event that issuance of the Certificate of Occupancy is for any reason not expected in a timely fashion, the School's Governing Board intends to direct the ESP to locate alternative facilities options suitable for school use immediately for the Board's review. The Governing Board will require periodic updates from its ESP concerning the progress that is being made in final identification of a suitable facility. Any such facility shall be zoned for educational use and contain the adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency.

22.2. Describe the five-year plan that includes information, timeline(s), and the individual(s) responsible for each of the following items:

- **Finances;**
- **Budget;**
- **Insurance coverage; and**
- **Facility construction, preparation, and contingencies.**

Finance and Budget

The Governing Board has the ultimate responsibility to ensure that the School's finances are managed properly. The Board will contract with an Education Service and Support Provider (ESP), which will assist the Board and the School Principal with the preparation and reporting of the School's finances.

The School has established sound financial policies and accounting procedures to safeguard its finances. The Governing Board shall annually adopt and maintain an operating budget, retain the services of a certified public accountant or auditor for the annual independent financial audit and review, and will approve the audit report, including audit findings and recommendations. In the event a financial recovery plan is necessary, the Board will monitor it and ensure such plan is appropriately maintained. The Governing Board of the School will also review and monitor the financial statements of the School on at least a quarterly basis during regularly scheduled Board Meetings.

Controls - The Board of Directors is responsible for establishing and maintaining a system of internal controls in order to provide reasonable assurance that the school's assets are safeguarded against loss from unauthorized use or disposition, and that transactions are executed in accordance with the school's authorization and recorded properly in the financial records. Specifically, the Board has established controls in accordance with all applicable federal, state and local laws and in line with accepted industry standards and best practices regarding:

- Revenues, accounts receivable, and cash receipts
- Expenditures, accounts payable, and cash disbursements
- Budgeting and financial reporting
- Risk management
- School inventory & capital assets
- Student records
- Employment records

Standard procedures utilized to ensure sound internal accounting and a system of checks and balances include:

General Accounting - utilization of accepted state codification of accounts pursuant to the *Financial and Program Cost Accounting and Reporting* in all transactions pertaining to its operations.

Internal accounting procedures for the School pertaining to receivables and disbursements are as follows:

For receivables, all cash payments will be logged, coded by source and deposited in a timely manner. Deposits are reconciled to cash receipt logs. Disbursements will be made only to approved vendors and must be appropriately authorized. Disbursement packages are prepared at the School site and authorized by the School Principal. Disbursement vouchers are submitted to the ESP with appropriate supporting documentation to substantiate the nature, account classification, business purpose and amount. Disbursement packages are reviewed and approved by the Principal and the ESP. For internal accounts, all disbursements require two signatures. For operating and lunch accounts, disbursements require two signatures for any check in the amount of \$10,000 or above. Checks in the amount of \$25,000 or above require that one of the signatures be that of the Board Chair, with the exception of certain previously board-approved expenses such as facility leases, inter-entity shared expense reimbursements, and other contracted services. Authorized signatures on checks are limited to the Chair of the Governing Board, the President, the School Principal/designee, ESP representative, and others, as approved by the Governing Board.

Bank statements will be reconciled on a monthly basis. The School will provide regular financial statements to the Sponsor including a statement of revenues and expenditures and changes in fund balances, prepared in accordance with generally accepted accounting principles. These will be provided on the dates required by the School Board in the charter school contractual agreement between the School and the Sponsor.

Wire Transfers - copies of all wire transfers (e.g., FTE funds, grants, charter school capital outlay) into the school's banking account(s) along with supporting documentation are maintained and recorded in the general ledger by journal entry.

Internal Revenue Collection - funds collected at the school (i.e., lunch monies, fundraisers, field trips) will be initially collected by designated school staff. These funds along with supporting documents are submitted to the Financial Manager/Treasurer whose responsibility is to record and prepare the deposit. All deposits will be prepared in duplicate; the original goes to the financial institution and the copy remains intact in the deposit book. A copy of the financial institution validated receipt along with supporting documentation will be maintained.

Capital Expenditures - purchase orders are required for all capital expenditures and are pre-approved by the Executive Director, Principal, or Designee. Limits are set by the Board of Directors and may change as necessary. These purchase orders are sent to the vendor and ESP, and copy retained at the school on file in the Accounting Office. Any purchase order totaling more than the limit as set by the Board of Directors requires Board action.

Operational Checking Accounts - all expenses related to the operations of the school are paid from the operating account. All operating expenditures are subject to the same approval processes as indicated for capital expenditures. All accounts are reconciled on a monthly basis.

Authorized Check Signers - authorized signers on school accounts are limited to certain specified individuals as approved by the Board of Directors.

Segregation of Duties relating to financial controls – The school principal will be responsible for all aspects of school operations within the scope of operating policy and budgetary approval by the Governing Board. The school's on-site administration/faculty and staff will report directly to the Principal, who then reports to the Governing Board. The ESP, contracted by the board, will provide bookkeeping, and financial forecasting services to the Governing Board for its oversight and approval.

The Board, at minimum, will be responsible for:

1. reviewing and approving a preliminary annual budget prior to the beginning of the fiscal year;
2. reviewing quarterly financial statements, which include a balance sheet and statement of revenue, expenditures and changes in fund balance, at each public board meeting;
3. annually adopting and maintaining operating budget for the school;
4. retaining the services of a certified public accountant/auditor to conduct the annual independent financial audit;
5. reviewing and approving the audit report, including audit findings and recommendations;
6. reporting to all applicable legal agencies including the charter school's sponsor;
7. overseeing the school's principal and all financial matters delegated to the principal; and
8. reviewing and approving the monthly financial statements submitted to the school board. The governing board may review/approve all monthly financial statements for the months between two successive board meetings. The governing board will record the review/approval of these statements (month/year indicated) in its minutes.

All expenditures, with the exception of exempt items as listed in the board's Financial Policies and Procedures manual, require a purchase order, which is approved by the School Principal. Expenditures are incurred based on the board-approved annual budget. Expenditures outside of the board-approved budget that exceed \$10,000 must be presented to the board for approval and inclusion in the budget.

Invoices are received by the ESP, linked to the approved purchase order, and routed to the School Principal for approval. Upon approval, payment may be processed by the Accounts Payable Representative. Disbursements for approved invoices (checks/ACHs/wire transfers) are approved by the ESP's Chief Financial Officer. Second signatures from authorized signers on the bank accounts are obtained based on the established dollar thresholds.

Bank statements are reconciled by the Financial Specialist. The person processing payments shall not be the same person to reconcile the bank statements. The person processing payments and reconciling bank statements shall not be an authorized signer on the bank accounts.

The Principal will manage the day-to-day operations and site-based finances, including expenditures and receivables. The Board will adopt a policy whereby the Principal will need to seek prior approval from the Board for expenditures over a pre-approved amount. The Principal will report at least quarterly to the Governing Board on the progress of the site-based budget and make recommendations and seek approval for large expenses. The Governing Board will oversee the Principal and remain responsible for all financial matters delegated to the Principal.

Yearly preliminary budgets are approved at the Annual Meeting each year.

Insurance

The School will maintain insurance coverage limits that either meet or exceed the District minimum insurance limit requirements. The School's insurance shall cover the School (and its subcontractors, to the extent that it is not otherwise insured) for those sources of liability which would be covered by the latest edition of the standard Workers' Compensation Policy.

Minimum Limits: There shall be no maximum limit on the amount of coverage for liability imposed by the Iowa Workers' Compensation Law. The insurance carrier has AM Best financial rating of A XII, with over \$1 billion in retained earnings according to AM Best. Insurance will be renewed at the Annual Meeting each year.

Facilities

The Board plans to engage an experienced charter school facilities developer to acquire, design, plan and construct facilities for lease, which are appropriate to the needs of the School. The School would need a one or multi-story structure built or renovated to meet all requisite codes and life-safety regulations set forth by the applicable governing agency.

Size and Layout of Space: The facility will continue to be built out based on the demand for the school to have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed facility will include program elements such as traditional classrooms, art, science and computer labs, multimedia instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

23. Fundraising

23.1. Does the proposed charter school have anticipated fundraising contributions (Mark only one set of brackets)?

This includes any fundraising activities or grant activities known to the applicant at the time of the application. Examples might include U.S. Department of Education grants, state grants, or local fundraising efforts.

- ☐ Yes (must attach evidence to 23.1.1)
☒ No (skip to 24.1)

23.1.1. If yes, attach evidence of the contributions to [Appendix I](#).

24. Evidence of Prior Student Success

24.1. Will the proposed governing board contract with an education services provider (Mark only one set of brackets)?

- ☒ Yes (continue to 24.2)
☐ No (skip to 26.1)

24.2. Attach evidence of the educational service provider's success in serving student populations like those proposed in this application to [Appendix J](#).

This may include demonstration of:

- Growth on assessment scores over time for the specific population;
- Provision of curriculum and instruction matched to the student population being served;
- Increased student enrollment and attendance for the specific population;
- Decreased student discipline for the specific population; and
- Exemplary parent and community involvement for the specific population.

24.3. Has the educational service provider operated other charter schools (Mark either yes or no)?

A "No" response does not disqualify the applicant.

- ☒ Yes (must attach evidence to 24.3.1)
☐ No (skip to 25.1)

24. Evidence of Prior Student Success

24.3.1. If yes, attach evidence of past performance of other charter schools and the founding group's capacity for an additional charter school to [Appendix K](#).

This must include demonstration of the founding group's:

- Past performance of other charter schools, which may be demonstrated by:
 - Growth on assessment scores over time;
 - Curriculum, instruction, and assessment matched to the mission of the charter school;
 - Increased student enrollment and attendance;
 - Decreased student discipline;
 - Exemplary parent and community involvement;
 - Financial stability; and
 - Staff stability.
- Capacity for an additional charter school, which may be demonstrated by:
 - Sound budget management;
 - Proper allocation of resources;
 - Fundraising efforts; and
 - Level of commitment and time for the proposed school.

25. Proposed Staff Performance Evaluation

25.1. Describe the proposed educational service provider's staff performance evaluation measures and compensation structure for teachers, administrators, and other staff members.

Teachers, support staff, and contractual staff will be directly supervised by the Principal, and will be reviewed against their job description and performance evaluation criteria on a semi-annual basis. The Principal will be hired directly by the school's board. The ESP does not have any supervisory responsibilities over school employees.

25.2. Describe the proposed educational service provider's methods of contract oversight and dispute resolution.

The ESP is hired by the Board to provide certain services, which support the operations of the school. The Board and Principal annually evaluates the ESP and determines continuation and renewal of services based on the ESP's performance on the services and support it provides to the school. The principal reports to the Governing Board, which evaluates them. The Board has the ultimate authority to hire and fire the ESP. Academica has provided services and support to charter schools for over two decades. The success of the networks Academica supports and their educational programs is a testament to the level of service provided by the ESP. The relationship with the ESP allows the school to focus on providing the highest quality educational program at the school site while allowing the ESP to focus on the business and academic support services the school needs to succeed.

The principal, as the leader, is the individual responsible for the day-to-day operations of the school, including school-wide and student achievement. The ESP does not sign off on annual performance evaluations for principals or staff. The ESP does not establish or implement a school's curriculum. The ESP does, however, assist the Board and the school in developing their own curriculum by providing them with the resources and

tools for research and development, strategic planning, and sharing of best practices of other successful charter schools.

25.3. Describe the proposed educational service provider's investment disclosures and conflicts of interest.

The proposed ESP operates transparently and ethically, without conflicting interests. If such potential conflicts arise, they are disclosed. The ESP operates with the school's best interests in priority.

26. Proposed Charter School Contract with State Board

26.1. Attach an outline of the proposed charter school contract with the State Board to [Appendix L](#) that includes:

- **Duration,**
- **Designation of roles,**
- **Authority,**
- **Duties of the governing board, and**
- **Charter school staff.**

Any contract should include a review by the applicant's legal counsel.

27. Statute and/or Rule Waiver

27.1. Does the independent founding group wish to request a waiver of one or more of the following requirements from which the charter is not already exempt according to Iowa Administrative Code chapter 19.11 (2): Iowa Code section 256.7(21) and the educational standards of Iowa Code section 256.11 and/or the minimum requirements for instructional hours or days (Mark only one set of brackets)?

- ☐ Yes (continue to 27.2)
☒ No (skip to assurances and conditions)

27.2. Select each statute and/or administrative rule with which the charter school does not intend to comply (Mark all that apply).

- ☐ Requirements of Iowa Code section 256.7, subsection 21 and the educational standards of Iowa Code section 256.11.
☐ Provision of instruction for at least the number of days or hours required by Iowa Code section 279.10, subsection 1.

27.3. Describe the technical assistance sought by the independent founding group from the Department concerning statutes and administrative rules that may be waived including the reason the charter is requesting to have each statute and/or administrative rule waived.

No technical assistance was sought concerning statutes and administrative rules to be waived.

Iowa Public Charter School Program Assurances and Conditions

ASSURANCES

Please mark the following assurances with Y for yes and N for no. If the applicant is unable to assure compliance with any of the assurances, the application will not be approved. Later discovery of a provider's failure to adhere to any of the assurances may be the basis for the State Board to revoke the charter contract.

Y/N	The proposed charter school assures that:
Y	A. It will meet all applicable federal, state, and local health and safety requirements and laws prohibiting discrimination based on race, creed, color, sex, sexual orientation, gender identity, national origin, religion, ancestry, or disability. If approved, the charter school will be subject to any court-ordered desegregation in effect for the school district at the time the charter school application is approved, unless otherwise specifically provided for in the desegregation order.
Y	B. It will operate as a nonsectarian, nonreligious school.
Y	C. It will be free of tuition and application fees to Iowa resident students between the ages of five and 21 years.
Y	D. It will comply with chapters 216 and 216A relating to civil and human rights.
Y	E. It will provide special education services in accordance with chapter 256B.
Y	F. It understands that it is subject to the same financial audits, audit procedures, and audit requirements as a school district. The audit must be consistent with the requirements of sections 11.6, 11.14, 11.19, and 279.29, and section 256.9, subsection 20, except to the extent deviations are necessary because of the program at the school. The Department, the auditor of state, or the Legislative Services Agency may conduct financial, program, or compliance audits.
Y	G. It will comply with the requirements of section 256.7, subsection 21, and the educational standards of section 256.11, unless specifically waived by the State Board during the application process.
Y	H. It will provide instruction for at least the number of days or hours required by section 279.10, subsection 1, unless specifically waived by the State Board as part of the application process.
Y	I. It will comply with the requirements of chapter 256E.
Y	J. Its governing board meetings will be conducted in a manner that is open to the public. The governing board will be a governmental body for purposes of chapter 21 relating to open meetings.

Y	K. It understands that all records, documents, and electronic data of the charter school and of the governing board—its governing body for purposes of chapter 22—will be public records and are subject to the provisions of chapter 22 relating to the examination of public records.
Y	L. It will employ or contract with teachers as defined in section 272.1, who hold valid licenses with an endorsement for the type of instruction or service for which the teachers are employed or under contract.
Y	M. It will have a chief administrator that is one of the following: <ul style="list-style-type: none"> • An administrator who holds a valid license under chapter 272, • A teacher who holds a valid license under chapter 272, or • An individual who holds an authorization to be a charter school administrator issued by the Board of Educational Examiners under chapter 272.
Y	N. It will not discriminate in its student admissions policies or practices based on intellectual or athletic ability, measures of achievement or aptitude, or status as a person with a disability. However, a charter school may limit admission to students who are within a particular range of ages or grade levels or on any other basis that would be legal if initiated by a school district.
Y	O. It will give enrollment priority to the siblings of students enrolled in a charter school.
Y	P. It will enroll an eligible student who submits a timely application unless the number of applications exceeds the capacity of a program, class, grade level, or building. In this case, students must be accepted by lot.
Y	Q. It will, upon enrollment of an eligible student, notify the public school district of residence not later than March 1 of the school year preceding the year of enrollment.
Y	R. It will adopt a conflict-of-interest policy and a code of ethics for all board members and employees.
Y	S. It will adopt a policy regarding the hiring of family members to avoid nepotism in hiring and supervision. The policy must include but is not limited to a disclosure to the governing board of potential nepotism in hiring and supervision. Any person subject to the policy with a conflict must not be involved in the hiring decision or supervision of a potential employee.
Y	T. It will prohibit individuals compensated by an education service provider from serving as a voting member on the governing board unless the State Board waives such prohibition.

Y	U. It will have a majority of the membership of the governing board be residents of the geographic area served by the charter school. Each member of the governing board who is not a resident of the geographic area served by the charter school must be a resident of Iowa.
Y	V. It will post the charter school's annual budget on the charter school's website for public viewing within 10 days of approval of the budget. Each posted budget must continue to be accessible to the public on the website for all subsequent budget years [Iowa Code § 256E.7(2)-(11)].

CONDITIONS

Each condition must be met and followed for the duration of the charter school contract. The failure to maintain any of these conditions could result in the revocation of the charter by the State Board [Iowa Code § 256E.10(3)].

Reporting

To meet the data reporting requirements, including student enrollment and performance information needed for the performance framework, charter schools must use a student information system that will transmit information to the Department that is compliant with the School Interoperability Framework (SIF) education data standard [Iowa Admin. Code r. 281—19.10(3)].

Non-Discrimination

Iowa Code section 256E.7, subsection 4, states that a charter school cannot discriminate in its student admissions policies or practices based on intellectual or athletic ability, measures of achievement or aptitude, or status as a person with a disability. However, a charter school may limit admission to students who are within a particular range of age or grade level or on any other basis that would be legal if initiated by a school district. Enrollment priority must be given to the siblings of students enrolled in a charter school.

Certification

WE, THE UNDERSIGNED, do hereby submit an Iowa public charter school program application and agree to the conditions and assurances contained therein.


 Founding Group Authorized Representative Signature

I November 2023
 Date

Proposed Governing Board President Signature*


Date
 11/1/23

Education Service Provider Authorized Representative Signature*

Date

*If identified

Appendix A: 5. Optional Attachment – Evidence of Need and Community Support

Included below

- Letter of support from Iowa Coalition for Public Charter Schools



October 27, 2023

To State Board of Education,

My name is Mike Huguelet and I am the Executive Director of the Iowa Coalition for Public Charter Schools. The Coalition is the statewide association responsible for launching and supporting high-quality public charter schools in Iowa. Almost all states that allow for public charters have a state association that helps to ensure quality operation of its member schools. We officially launched in July of 2023. Over the past few months, I have been meeting with charter management organizations (CMOs) from around the country that are interested in bringing proven school models to Iowa. I have also worked with local community members and groups interested in filling an educational gap in their community. I am writing to support the application of Opportunity Education to launch two new public charter schools, one in Cedar Rapids and one in Des Moines. Opportunity Education currently operates two schools, one in California and Nebraska. Their model focuses on engagement for both students and teachers and I believe this will lead to better outcomes for students in Iowa.

Teacher attrition has been on the rise in America for the past decade. Around 10% or more of teachers are leaving the classroom each year, depending upon which state you reside. While there are many factors that contribute to teacher attrition, one of the factors is the lack of professional development. Like all professionals, teachers want to improve their skillsets and participate in meaningful experiences in the field. Opportunity Education provides teachers with lesson planning resources to increase the efficacy of their instruction. They provide professional development courses that help teachers foster student engagement and active learning. At the end of the day, educators entered the profession to connect with students, so helping them facilitate those connections is an effective way to boost retention in the classroom.

In the digital age, the way students interact with the world and acquire information has changed. Our instructional methods need to evolve accordingly. Rote memorization for traditional assessments does not foster student engagement and the attendance records in many school districts is direct evidence of this. Successful schools in the 21st century are adapting both their instructional methods and assessment practices. Opportunity Education is leading the way with their project-based learning curriculum that is engaging for all students. Their teachers check for student understanding through mastery assessments. Instead of parroting back information from a lesson on a traditional quiz or test, Opportunity Education students synthesize the information they learned on a project to show their mastery of content. This method is both more engaging for students and more effective for long-term retention. Additionally, student

engagement increases when they see the relevance of coursework to their postsecondary pursuits. Opportunity Education uses their Pathways Program to increase and maintain their students' investment in their futures. Pathways facilitates career and interest exploration, develops pre-professional skills, and teaches financial literacy. All of these in unison help students connect classroom curriculum to real world application.

I support Opportunity Education as they submit an application to launch two schools in Iowa. I believe that students and teachers in Cedar Rapids and Des Moines will benefit from their engaging and supportive model, which will deliver better outcomes for all.

Respectfully,

Mike Huguelet

Mike Huguelet
Executive Director
Iowa Coalition for Public Charter Schools

Appendix B: 6.2. Attach the curriculum vitae (CV) or résumé for each founding member.

Included below

- CV for Manuel Mattke
- CV for Ray Ravaglia
- CV for Joe Ricketts

Manuel Mattke

Anacortes, WA

Contact

E: mmattke@opportunityeducation.org

L: <https://www.linkedin.com/in/manuelmattke/>

M: 301-455-6266

Skills

Strategic leader with experience in both technology and operational leadership. Entrepreneur, worked mostly in early-stage companies, developing technology products or services for enterprise-grade customers.

Fluent in English and German.

CliftonStrengths: Strategic, Futuristic, Relator, Ideation, Self-Assurance.

Experience

Opportunity Education / President & COO

October 2018 - PRESENT

At the direction of our CEO, Joe Ricketts, lead development, rollout and operational support of the Quest Forward Learning program for high schools and their students worldwide.

Opportunity Education / Chief Innovation Officer

October 2014 - September 2018

Led the design and related technology development for the Quest Forward Learning program, and established operational support infrastructure for the program worldwide.

Hydra Insight / CEO

January 2012 - September 2014

Provided technology strategy services to innovation-oriented clients, including product evaluation, product strategy, partner selection and management. Led select product efforts in early stage development.

BD Metrics, Vartopia, Kingswood Group / CTO, COO

April 2009- December 2011

Provided transitional CTO or COO capabilities for companies needing to build early stage teams or products, or during significant company transitions.

Apex Digital Systems / CEO

January 1998 - April 2008

Founded, grew and sold custom enterprise software company focused on building early stage web applications for biotech, pharmaceutical, R&D and government clients.

Education

Haverford College / BA, Philosophy

1986 - 1991. Magna cum Laude, Phi Beta Kappa.

Raymond Ravaglia
+1.650.387.2223
ray@ravaglia.net

Curriculum Vitae (*Informal*)

Education

1991 M.A. in Philosophy, Stanford University
(n.b. M.A. requirements completed in PhD program, degree not conferred)

1989 B.A. in Philosophy, Stanford University

Experience

2016-Present Chief Learning Officer, Opportunity Education.
Devised the Opportunity Education Next Generation Learning methodology, Principal Architect of two Quest Forward Academy schools, author of Quest Forward Academy Course of Study, author of Ricketts Great Books College Course of Study.

2014-2016 Principal, Ravaglia Consulting.
Created the Pre-College Division of The School of The New York Times and served as Director of that Division. Also, served as a consultant to Opportunity Education on their Next Generation Learning Project. Also served as founder and Vice-Chairman for Dwight Global Online School, attached to the Dwight School in NYC.

2012-2014 Associate Dean and Director, Stanford Pre-Collegiate Studies (SPCS) at Stanford University. Oversaw all aspects of \$20M per year unit of Stanford University, including online courses, the Stanford Online High School (Founder), the Pre-Collegiate Summer Institutes (Founder), the Stanford Summer College, and the Stanford Summer College Academy

2010-2012 Executive Director and Founder, Education Program for Gifted Youth (EPGY) at Stanford University

1992-2009 Deputy Director and Founder, Education Program for Gifted Youth (EPGY) at Stanford University

1988-1992 Graduate Research Assistant, Institute for Mathematics Studies in the Social Sciences (IMSSS) at Stanford University

1987-1988 Research Assistant, Institute for Mathematics Studies in the Social Sciences (IMSSS) at Stanford University

Selected Major Initiatives

(2017) Founder and principal architect of the NGL Academies, two new independent schools incorporating technology in unique ways, supported by Opportunity Education. Located in Santa Rosa, CA and Omaha, NE.

(2016) Founder and Vice-Chairman of Dwight Global, an independent school combining online and residential components, attached to Dwight School in New York City.

(2015) Founder of the Pre-College Program at The School of The New York Times – residential summer program for high school students, with a focus on the intersection of ideas and careers.

(2014) Created the Stanford Summer College Academy – first blended online, residential program targeting high performing gifted students.

(2012) Created the Malone School Online Network – a consortium of sixteen independent schools offering courses to each other's students using the model of the Stanford Online High School.

(2006) Created the Stanford Online High School – fully accredited, diploma granting Independent School for grades 7-12. Pioneered model of the blended (asynchronous and synchronous), flipped classroom, seminar style of online learning.

(2003) Created the Stanford Honors Academies – two week non-residential, live programs conducted in Singapore, Korea, Hong Kong, China, Thailand, and Indonesia.

(2000) Created Summer Institute in Mathematics and Physics, later called EPGY Summer Institutes – the premier residential program for gifted students.

(1992) Founded Education Program for Gifted Youth (EPGY) – first provider of online courses for gifted and talented students.

Selected Publications

Ravaglia, R (2023). *The Ricketts Great Books College Course of Study*, Great Books College LLC, Littleton Colorado.

Ravaglia, R (2021). *The Quest Forward High School Course of Study*, Opportunity Education, Omaha Nebraska.

Scarborough, J, and Ravaglia, R (2016). *Perspectives from the Disciplines*, CSLI Publications, Stanford California.

Scarborough, J, and Ravaglia, R (2014). *Bricks and Mortar: The Making of a Real Education at the Stanford Online High School*, CSLI Publications, Stanford California.

Ravaglia, R (2007). An Online High School at Stanford University. *Understanding Our Gifted*, 19: 4, pp. 12-17.

Sommer, R., Rozenfeld, M., & Ravaglia, R. (2000). A proof environment for teaching mathematics. In *Proceedings of CADE-17 Workshop on Automated Deduction in Education*. June, 2000.

Ravaglia, R., & Sommer, R. (2000). Expanding the Curriculum with Distance Learning. *Principal*, 79: 3, pp. 10-14.

Ravaglia, R., Sommer, R., Sanders, M., Oas, G., & DeLeone, C. (1999). Computer-based Mathematics and Physics for Gifted Remote Students. In *Proceedings of M/Set 1999*, ed. D. Thomas. Association for the Advancement of Computing in Education, Charlottesville, VA, pp. 405-410.

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Ravaglia R. (1995). Design issues in a stand alone multimedia computer-based mathematics curriculum. In *Fourth Annual Multimedia in Education and Industry*, Asheville, NC, pp. 49-52.

Suppes, P., Bottner, M., Liang, L., & Ravaglia, R. (1995). Machine Learning of Natural Language: Problems and Prospects. In *WOFCAL 95. Proceedings of the Second World Conference on the Fundamentals of Artificial Intelligence*, ed. Michael de Glas & Z. Pawlak, 511-525. Paris. Angkor.

Ravaglia, R., de Barros, J. A., Suppes, P. (1995). Computer-based advanced placement physics for gifted students. *Computers in Physics*, 9:380–386.

Ravaglia, R. (1990). *User's Guide for the Equational Derivation System*. Education Program for Gifted Youth, Palo Alto.

Ager, T., Ravaglia, R., & Dooley, S. (1989). Representation of inference in computer algebra systems with applications to intelligent tutoring. In *Computers and Mathematics*, eds. E. Kaltofen & S. Watt. Springer-Verlag, New York, pp. 215–227.

Selected Conference Papers and Invited Talks

(2023) “Artificial Intelligence, Freedom, and Human Development – From High School, to College, to Career,” Keynote address at Education World India Annual School Awards, New Delhi, India, 2023.

(2015) “Bringing Your High School Online” Presented at the Education World India Annual School Awards, New Delhi, India, 2015.

(2014) “Keeping it Real while Going Virtual” Presented at the Online Education Symposium for Independent Schools, Marina Del Rey, California, 2014.

(2013) “25 Years of the Next New Thing in Online Learning” Presented at Office of Knowledge Management and Development Conference, Bangkok Thailand, 2013.

(2013) “MOOCs are Not the answer for minority STEM education” Presented at Level Playing Field Institute, San Francisco, California, 2013.

(2013) “The Malone School Online Network” Presented at the Online Education Symposium for Independent Schools, Marina Del Rey, California, 2013.

(2011) “A Next Generation Learning Experience, Today” Presented at the Texas Digital Learning Association Conference 2011, San Antonio, Texas, 2011.

(2009) “Closing the Achievement Gap in Middle School Mathematics.” Presented at the Institute for Educational Sciences Research Conference 2009, Washington DC, 2009.

(2006) “Stanford University’s Online High School for Gifted Students.” Presented at the National Association for Gifted Children Annual Conference. Charlotte, North Carolina 2006.

(2003) “Creating Creativity Creatively.” Presented at World Knowledge Forum 2003. Seoul, Korea 2003.

(2003) “Essential Interactivity in E-Learning.” Presented at E-merging, E-learning 2003. Abu Dhabi Colleges for Higher Education. Abu Dhabi, United Arab Emirates, 2003.

(2002) “Symbolic Computation and Secondary Mathematics.” Presented at Maple Summer Workshop 2002. Waterloo, Canada, 2002.

(2000) “Advanced Placement for Younger Gifted Students.” Presented at College Board and Department of Education National Forum: *Expanding Advanced Placement Opportunities*. Washington DC., 2000.

(1999) “E-learning and Advanced Placement.” Presented at College Board National Forum: *Is Distance Learning Next for AP*. San Diego, CA, 1999.

(1999) “Computer-based Instruction for Gifted Younger Students.” Presented at EdNet 99 - the Educational Technology and Telecommunications Markets Conference. Seattle, Washington, 1999.

Selected Board Membership

Board of Directors for Dwight Global Online School (2016 – present)

Board of Directors for the OESIS Group (2013 – present)

Board of Directors for Loud Cloud Systems (2010 – 2016)

International Council for Online Learning, formerly, the North American Council for Online Learning (2003 – 2004). Founding Member

Selected Awards and Highlights

Computerworld Laureate for Innovation in Information Technology 2012

Computerworld Smithsonian Laureate for Innovation in Information Technology 1999

Centra 1997 Annual Enterprise Learning Pioneer Award

Gifted Child Quarterly Paper of the Year for 1996

First online school accredited by Western Association of Schools and Colleges in 2006, California Association of Independent Schools in 2014.

Recipient of over \$10M in funding from Malone Family Foundation to support the creation and development of the Stanford Online High School.

J. Joe Ricketts

Having spent more than 35 years helping to establish and run the world's largest online brokerage, Joe Ricketts today has returned to his roots, focusing on a wide range of entrepreneurial and philanthropic ventures.

A pioneer in the use of technology to revolutionize the financial services sector, Mr. Ricketts founded the company now known as TD Ameritrade, a securities industry leader that empowers self-directed investors with powerful and innovative investment tools and training.



After graduating Creighton University in 1968 with an economics degree, Mr. Ricketts began his professional career first as a branch manager at Dun & Bradstreet, then as a registered representative with Dean Witter. In 1975, he co-founded First Omaha Securities, a retail securities brokerage firm in Omaha, Nebraska. Mr. Ricketts recognized that featuring negotiated commissions would allow the firm to take advantage of the newly deregulated discount securities market. Under Mr. Ricketts' leadership, First Omaha Securities grew quickly and, through the use of innovative technology and marketing, evolved into TD Ameritrade. Today TD Ameritrade manages hundreds of billions of dollars in client assets and leads its competitors with hundreds of thousands of trades per day.

Since 2008, Mr. Ricketts has devoted himself to a variety of entrepreneurial ventures. He has also actively engaged in philanthropy through Opportunity Education Foundation, The Cloisters on the Platte Foundation, The Ricketts Conservation Foundation, and The Ricketts Art Foundation.

A native of Nebraska, Mr. Ricketts now lives in Little Jackson Hole, Wyoming. Mr. Ricketts and his wife of more than 50 years have four children and thirteen grandchildren.

Appendix C: 6.4. Attach the CV or résumé for each governing board member.

The governing board membership has not yet been determined.

Appendix D: 6.5. Attach the CV or résumé for each administrator.

Included below

- CV for Mike Brown
- Sample position summaries

Michael T. Brown

5177 S. 197th Avenue Circle
Omaha, NE. 68135
mbrown@questforward.academy

Cell: (402) 759-2501
Work: (402) 403-1267
mibrown2501@gmail.com

I am an experienced School Administrator with a vast educational background and real world experiences. As an administrator I am focused on a progressive and forward thinking district. I am always seeking a challenging position that allows me to lead in a positive and productive manner over a team oriented organization. My personal goal is to be a positive influence and to encourage excellence in academics, as well as activities for both student and educator. I believe from the position of Superintendent of Schools I can create a cohesive educational environment continuously growing and performing at high levels. I am an educator with a growth mindset and believe we are all lifelong learners.

Education:

- Wayne State College, Wayne, NE, July 2015, Specialist Degree School Administration
- University of Nebraska at Kearney, May 2007, Master of Arts in Education
- University of Nebraska at Kearney, May 1999, Bachelor of Arts in Education
- McCook Community College, May 1996, Associate of Arts

Certifications:

- Nebraska Educational Specialist; School Superintendent
- Nebraska Educational Administration; PK-12 Principalship
- Nebraska Business, Marketing, Information Technology; 6-12
- Nebraska Work-Based Learning; 9-12
- Iowa Superintendent; Pending Approval

Administrative Experience:

- **July 2021-Present: Director, Quest Forward High School, Omaha, NE**
 - Administration: All aspects of administration for a Private High School, to include: Budgeting, Facilities and Grounds, Transportation, Policy Management, Legal aspects, Supervision/Evaluation of Administration and Faculty, Public Relations and Marketing, Staff retention and recruitment, Student Recruitment, as well as various other activities to maintain a smooth running Private High School. Led the school through many changes and improvements to include moving the school to a new location, implementing lunch programs, and transforming the student transportation system to a sustainable operating condition. Was part of a team that led the school to National Accreditation.
- **July 2017-June 2021: Superintendent, Boyd County Public Schools, Spencer, NE**
 - Administration: All aspects of administration for a D1/C2 School District, to include: Budgeting, Facilities and Grounds, Transportation, Board Updates and Policies, Legal aspects, Supervision/Evaluation of Administration, Public Relations, Staff retention and recruitment, Title IX coordination, as well as various other activities to keep the district running smoothly. Also took part in leading the consolidation process of Lynch and West Boyd Schools to become Boyd County Schools. Helped to usher the school and community through the flood of 2019. In the process of working through the COVID pandemic with the district, ensuring that students are safe and given the best educational opportunities in the midst of this tough time.
- **August 2011-July 2017: K-12 Principal, Osmond Community Schools, Osmond, NE**
 - Administration: All aspects of administration for a D2 School District in grades K-12 to include scheduling, registration, hiring of certified and non-certified staff, teacher evaluation, dismissal of

certified and non-certified staff, Reading Coordinator, Student discipline, Continuous Improvement Planning, Curriculum implementation and development, technology implementation and various other administrative duties and responsibilities.

➤ **August 2008 - 2011: PK-12 Principal, Bruning-Davenport USD, Bruning, NE**

- Administration: All aspects of administration for a D1 School District in grades PK-12 to include scheduling, registration, hiring of certified and non-certified staff, teacher evaluation, dismissal of certified and non-certified staff, Reading Coordinator, Student discipline, Continuous Improvement Planning, Curriculum implementation and development, technology implementation and various other administrative duties and responsibilities.

Teaching Experience:

➤ **August 2001 to 2008: 7-12 Business/Computer Education, Sargent Public Schools, Sargent, NE**

- Administration: Acting Assistant Principal/Activity Director in absence of Administration, 2005 to 2008
- Instructor: Business/Computer Education Classes
- Coach: Assistant Football, Head Girls Basketball, Head Junior High Girls Basketball, and Head Junior High Girls Track
- Other Positions: Curriculum Committee 2005-2006, Head of Salary Negotiations 2004-2006, Teachers' Union President 2005-2006
- Coach: Head Football, Head Girls Basketball, and Head Boys and Girls Track

➤ **August 1999 to August 2001: 7-12 Business/Computer Education, Technology Coordinator
Wheatland Public Schools, Madrid, NE**

- Instructor: Business/Computer Education Classes
- Technology: Served as LAN Manager for two separate buildings utilizing over 125 combined computers/mobile wireless computer lab
- Coach: Head Football, Head Girls Basketball, and Head Boys and Girls Track

Employment:

➤ **Mid-Plains Community College, North Platte, NE 1999-2003**

- Instructor: Adult Computer Education evening classes
 - Classes Taught: Beginning Computers, Internet Exploration, Microsoft PowerPoint and Word.

➤ **Michael T. Brown Floor Covering Installations 1994-1999**

- Owner and operator
 - Duties: Advertising, billing, inventory, supervision of employees, and installation of floor coverings.

➤ **Activities Bus Driver, Trenton Public Schools, Trenton, NE 1994-1995**

- Drove the school bus for all extra-curricular activities and for all grade levels.

➤ **U.S. Army, Federal Republic of Germany and Lawton, OK 1989-1994**

- Unit Mail clerk/Publications Manager
 - Duties: Maintained an organizational mailroom providing postal services to over 400 soldiers and supervised the ordering and issuing of all forms and technical manuals used by the organization.
- Command Staff Driver

- Duties: Drove and maintained vehicles for two different Unit Commanders, operated and maintained various communication systems.

Professional Organizations:

- Member of AASA, School Superintendent Association (7 years)
- Member of Nebraska Association of School Administrators (16 years)
- Former Member of Nebraska Coaches Association (18 years)
- Former Member of National Association of Secondary School Principals (10 years)
- Former Member National High School Coaches Association (18 years)
- Member of Omaha Good Life Church
- Member of American Legion
- Former TeamMates Board of Director for Bruning-Davenport Chapter
- Former TeamMates Board of Director for Osmond Chapter

Honors:

- Eagle Scout, Boy Scouts of America with two Palms
- Two Army Achievement Medals
- Two Army Certificates of Achievement
- Army Commendation Medal
- Army Certificate of Appreciation
- Army National Defense Medal
- Army Honorable Discharge

Hobbies:

- Fishing, Hunting, Camping, Automotive Restoration, and Spending Quality Family Time.

References:

Jenny Wingert, Former Board Member
Osmond Community Schools
Osmond, NE 68765 (402) 360-4137

Robert Hanzlik, Superintendent
Stuart Public Schools, Stuart, NE
(402) 340-0377

Dan Polk, Superintendent
Elgin Public Schools, Elgin, NE
(402) 843-2455

Corey Dahl, ESU 8 Director
ESU 8, Neligh, NE
(402) 887-5041

Frank Jesse, Superintendent
Chambers Public Schools, Chambers, NE
(402) 482-5233

Dale Martin, Retired Superintendent
Summerland Public Schools, Clearwater, NE
(402) 485-2505

Alan Garey, Superintendent
Medicine Valley Public Schools, Curtis, NE
(308) 367-4106

Dr. Dan Ernst (Retired) (402) 476-8055
Associate Executive Director
Nebraska Council of School Administrators

JOB DESCRIPTION

POSITION TITLE: School Principal

CONTRACT YEAR: Twelve Months

QUALIFICATIONS

EDUCATION: An earned master's Degree (or higher) from an accredited college or university

EXPERIENCE

REQUIRED: A total of five (5) years of school experience is required; which includes a minimum of three (3) years of required experience as a Principal/Assistant School Principal.

Valid Iowa Certification in School Principal, or Professional School Principal.

REPORTS TO: School Governing Board

SUPERVISES: All Administrative, Instructional, and Non-Instructional staff at the school.

POSITION GOAL: To provide the leadership and management necessary to administer and implement all programs, activities and policies essential to ensure high quality educational experiences and services for all students in a safe, nurturing, and enriching environment.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

LEADERSHIP

The School Principal shall:

- Administer, control, and supervise the instructional program of the school operations and school personnel.
- Encourage teachers and pupils to perform to the best of their ability.
- Interpret the educational program of the school and school system to the community.
- Provide leadership and direction for all aspects of the school's operation.
- Facilitate frequent communication with parents of the school community.

- Coordinate and adapt school curricular programs and policies.
- Assume responsibility for the buildings, grounds, equipment and supplies of the school; supervise the work of the custodians and maintenance staff; report to the governing board the conditions and needs of the school.
- Develop, implement, and evaluate the School Improvement Plan.
- Keep accurate account of all money paid to the school and record the purpose for which it was paid.
- Supervise and coordinate the budgetary process.
- Coordinate and conduct the interview process and make hiring and termination decisions for all staff.
- Develop and supervise New Teacher programs.
- Compile and prepare all student achievement outcomes.
- Report directly to the Governing Board for all purposes.
- Coordinate, supervise, and conduct the evaluations of all staff.
- Oversee the School Advisory Council.
- Maintain a positive and productive relationship with the Parent-Teacher Association.
- Supervise all students and staff.
- Coordinate and supervise the testing and assessment program.
- Enforce the discipline plan and assist teachers with all concerns and issues related to student behavior.
- Serve as final arbitrator for serious discipline problems in accordance with Sponsor and Board's policy and state statutes.
- Establish, actively pursue, and monitor a school mission, vision and goals in collaboration with staff, parents, students, and other stakeholders that are aligned with the Board's mission and goals.
- Supervise and coordinate school-wide programs, curricula and course options.
- Supervise and coordinate student registration, scheduling, and master scheduling construction.
- Oversee the grade reporting system.
- Monitor substitute teachers and the class coverage process.
- Supervise school activities and special events, and initiate fundraising activities.
- Establish business partnerships and positive relationships with community leaders.
- Maintain a master schedule of all school activities and events, including extracurricular trips.
- Coordinate and schedule the use of facilities for all events.
- Implement and enforce attendance and tardy policies and procedures for all students.
- Exercise proactive leadership in promoting the vision and mission of the school.
- Model and maintain high standards of professional conduct.
- Set high standards and expectations for self, others, and school.

- Demonstrate satisfactory or above performance on the Iowa Principal Competencies while performing all duties required by the job description.
- Provide leadership in the implementation of state mandated assessments designed and adapted to measure student achievement.
- Maintain active involvement in the school improvement planning process with the School Advisory Council by providing resources for decision-making and priority setting.
- Use quality improvement principles and process in daily administration of school.
- Implement procedures and policies that ensure a safe and orderly learning environment.
- Anticipate difficult situations and develop plans to handle them.
- Manage and administer the development, implementation and assessment of the instructional program at the assigned school so as to ensure student growth and achievement is continuous and appropriate.
- Use collaborative leadership style and quality processes to involve stakeholders in establishing and achieving the school's mission and goals.
- Provide leadership and direction for all aspects of the school's operation.
- Build teams to accomplish plans, goals and priorities.
- Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Communicate effectively both orally and in writing with parents, students, teachers and the community.
- Communicate school information, goals, student learning and behavior expectations to stakeholders.
- Develop and maintain a school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Establish procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Provide leadership to involve the school in quality initiatives.
- Establish procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Use effective communication techniques with students, teachers, parents and stakeholders.
- Communicate, through proper channels, to keep Board of Directors informed of impending problems or events of an unusual nature.

INFORMATION & ANALYSIS

- Address the diverse needs of the school population consistent with the Board's policies and Strategic Plan.
- Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction.
- Provide leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Analyze and use data for decision-making to improve actions, plans, and processes.
- Access, analyze, interpret and use data in decision-making.
- Use key information such as benchmarks and comparison data in the analysis of results to effectively measure performance.
- Make data accessible to all stakeholders

STRATEGIC PLANNING

- Develop long and short- term plans and goals within the School Improvement Plan, aligned with the strategic plan of the Board.
- Collaborate and provide resources to ensure the development of the School's Improvement Plan.
- Communicate overall School Improvement Plan requirements to all staff so each employee can understand how the goals and plans relate to his/her work.
- Allocate resources consistent with implementation of the School Improvement Plans.
- Utilize a systematic process for collecting input from stakeholders and incorporates customer requirements in development of School Improvement Plan.
- Establish procedures to monitor processes, activities and responsibilities and respond to feedback.
- Establish and coordinate procedures for student, teacher, parent and community evaluation of curriculum.
- Direct the development of the master schedule and assign teachers according to identified needs.
- Facilitate the horizontal and vertical articulation of curriculum within the school as well as between the school and its feeder system.
- Oversee the selection and acquisition of instructional materials and equipment
- Collect input and analyze data to develop goals.
- Set high goals and standards for self, others and the organization..
- Provide recognition and celebration for student, staff, and school accomplishments.

COMMUNITY ENGAGEMENT

- Facilitate a program of family and community involvement.
- Develop positive relationships with students, parents, teachers, community.
- Work with parents to resolve complaints or concerns.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Promote/market the school and its priorities to the community
- Establish processes and methods to respond to valid customer requirements.
- Facilitate, coordinate, and monitor the implementation of Student Education programs and services.
- Implement procedures to ensure that rights of children with disabilities and parents of such children are protected.
- Interact with government and service agencies relative to student welfare.
- Establish processes to determine customer needs and level of satisfaction.
- Establish guidelines for desirable student conduct and follow suspension and expulsion policies and procedures.
- Supervise the implementation of the school's student services plan, including guidance, drop-out prevention, health services, attendance and related areas.
- Take appropriate reporting and/or referral action whenever abuse situations are recognized.
- Provide leadership support for community involvement programs and business partnerships at the school level.
- Direct and develop the recruitment of Business Partners to benefit the school and community.
- Develop activities with business partners that promote student achievement.

HUMAN RESOURCES

- Manage appropriately and professionally personnel issues, including hiring, evaluations, staff deficiencies and retention; provides feedback on professional performance and offer assistance to strengthen weaknesses in performance.
- Interview and select qualified personnel
- Establish job assignments, supervise all assigned personnel, and conduct performance evaluations in accordance with current board policies and legislation.
- Delegate responsibilities to appropriate staff members.
- Make difficult personnel decisions according to policy when necessary including dealing with ineffective teacher or other staff performance.
- Establish and maintain individual professional development plans for each instructional employee that is linked to student achievement.

- Assign tasks and supervise personnel in task accomplishment including special projects.
- Analyze data and information to plan staff development to accomplish school goals.
- Complete annual Needs Assessment to determine staff development needs.
- Lead and manage development of personnel through staff development, in-service and other developmental activities that are linked to student achievement gains and the school improvement plan.
- Facilitate the development and implementation of an effective staff development program.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment
- Build a school community and environment, which supports learning and growth for everyone toward realization of the school's mission.
- Participate in Governing Board management meetings and other activities to enhance professional development.
- Serve as a coach/mentor to assistant principals or others who are preparing for School Principal certification.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and providing frequent feedback to those involved in improvement efforts.
- Consider data and results from action research when solving problems and improving processes.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Consider the aspirations of self and others in relation to the jobs and tasks assigned when assessing expertise and developmental needs.

OPERATIONS

- Manage and supervise the school's financial resources, including the preparation and disbursement of the school's budget and internal accounts.
- Establish and manage student accounting and attendance procedures at the school.
- Coordinate and manage the extra curricular student activities and funds at the school.
- Show positive trends in the achievement of improvement goal results in the areas of Operation, business practices (efficiency) and customer satisfaction.
- Demonstrate readiness and confidence in making and/or sharing decisions with those involved in a timely fashion.
- Employ an improvement cycle for operational problems that analyzes results, identifies root causes and takes corrective action.

- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
- Coordinate school maintenance and facility needs and monitor progress toward meeting those needs.
- Identify quality requirements of materials/services and communicate this information to parents, community and suppliers.
- Access Sponsor and community resources to meet school needs.
- Coordinate plant safety and facility inspections at the assigned school
- Monitor the maintenance at the school to ensure a safe, clean, and healthy, learning environment.
- Coordinate the school food service program at the school including the free and reduced food service requirements.
- Supervise transportation services at the school.
- Write and disseminate newsletters, memos, letters, press releases, agendas, and other materials using proper grammar and punctuation.
- Provide leadership in the effective use of technology in the classroom and in school administration.

Job Description

POSITION TITLE: Assistant Principal

QUALIFICATIONS

EDUCATION: An earned Master's Degree or higher from an accredited institution.
Iowa Professional Leadership Certification

EXPERIENCE

REQUIRED: Three (3) years teaching experience at a school site. Demonstrated ability to communicate effectively in both oral and written forms.

PREFERRED: 1-3 years of administrative experience at a school site.

REPORTS TO: School principal and school Board of Directors

SUPERVISES: Instructional and Service Personnel assigned by the principal.

POSITION GOAL: To assist the Principal in providing vision and leadership to develop, administer and monitor educational programs that optimize the human and material resources available for a successful and safe school program for students, staff and community.

SKILLS AND ABILITIES: The Assistant School Principal will effectively perform the performance responsibilities using the following skills and abilities:

- read, interpret and implement the appropriate state and federal statutes and policies, Authorizer's Policies and school board policies and procedures
- use group dynamics within the context of cultural diversity and be knowledgeable of state educational reform, accountability and effective school concepts
- demonstrate knowledge and practice of current educational trends, research and technology

- understand the unique needs, growth problems and characteristics of school students
- train, supervise and evaluate personnel
- demonstrate effective communication and interaction skills with all stakeholders

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The Assistant School Principal shall:

LEADERSHIP

- Use collaborative leadership style and quality process to involve stakeholders in establishing and achieving the school's mission and goals.
- Assist the principal in providing leadership and direction for all aspects of the school's operation.
- Assist in establishing and monitoring a school mission and goals that are aligned with the Board's mission and goals.
- Exercise proactive leadership in promoting the vision and mission of the Board's Strategic Plan.
- Maintain an active involvement in the school improvement planning process.
- Assist with establishing and monitoring procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Assist in the management and development of the implementation and assessment of the instructional program at the school to ensure all students have equal learning opportunities.
- Use quality improvement principles and processes in daily administration of school.
- Assist in developing and maintaining a safe school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Assist in conducting staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Build teams to accomplish plans, goals and priorities.
- Assist in the establishment of procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Anticipate difficult situations and develop plans to handle them.
- Serve as arbitrator for serious discipline problems in accordance with School policies, board and Authorizer's policies and state statutes.

- Communicate effectively both orally and in writing with supervisors, parents, students, teachers and the community.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Model and maintain high standards of professional conduct while setting high standards and expectations for self, others, and school.

INFORMATION & ANALYSIS

- Address the diverse needs of the school population
- Assist in providing leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Use current research, performance data, and feedback from students, teachers, parents and community to assist in making decisions related to improvement of instruction.
- Analyze and use data for decision-making or to improve actions, plans and process.
- Access, analyze, interpret and use data in decision-making.
- Use benchmarks and comparison data in the analysis of results and make data accessible to all stakeholders.

OPERATIONS

- Assist with managing and supervising the school's financial resources including the school's internal accounts.
- Assist with establishing and managing student accounting and attendance procedures at the school.
- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
- Assist with the coordination of school maintenance and facility needs and monitor progress toward meeting those needs.
- Assist with coordinating safety and facility inspections at the school.
- Assist in coordinating the school food service program at the school, including the free and reduced food service requirements.
- Assist with the supervision of all extracurricular programs at the school.
- Provide leadership in the effective use of technology in the classroom and in school administration.
- Assist with the writing and dissemination of newsletters, memos, letters, press releases, agendas, and other materials using proper grammar and punctuation.
- Perform other tasks consistent with the goals and objectives of this position as assigned by the Principal.

STRATEGIC PLANNING

- Assist with facilitating and coordinating the development of the School Improvement Plan.

- Assist in communicating overall School Improvement Plan requirements to all staff each employee can understand how the goals and plans relate to his/her own work.
- Assist in allocating resources consistent with the implementation of the School Improvement Plan.
- Collect input and analyze data to develop goals.
- Assist in the selection and acquisition of instructional materials and equipment.
- Assist with establishing and coordinating procedures for student, teacher, parent, and community evaluation of curriculum.
- Assist with facilitating the horizontal and vertical articulation of curriculum within the school.
- Develop the master schedule and assign teachers according to identified needs.
- Assist with providing recognition and celebration for student, staff, and school accomplishments.
- Set high goals and standards for self, others and the organization.

COMMUNITY ENGAGEMENT

- Develop positive relationships with all stakeholders (students, parents, teachers, community).
- Assist with facilitating a program of family and community involvement.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Assist in promoting/marketing the school and its priorities to the community.
- Assist in providing leadership to support community involvement programs and business partnerships at the school level.
- Assist in directing and developing the recruitment of Business Partners to benefit the school and community.
- Assist with the development of activities with business partners that promote student achievement.
- Assist in facilitating, coordinating, and monitoring the implementation of Student Education programs and services.
- Work with parents to resolve complaints or concerns.
- Interact with government and service agencies relative to student welfare.
- Take appropriate reporting and/or referral actions whenever abuse situations are recognized.
- Assist in supervising the implementation of the school's student services (including guidance, health services, and attendance) and other related areas.

HUMAN RESOURCES

- Manage issues, including hiring, evaluation, staff deficiencies and retention; appropriately and professionally personnel.
- Assist with interviewing and selection of qualified personnel to be recommended for appointment.
- Assist with difficult personnel decisions when necessary including dealing with ineffective teacher or staff performance.
- Delegate responsibilities to appropriate staff members.
- Assign tasks and supervise personnel in task accomplishment including special projects.
- Assist with the development and implementation of an effective staff development program.
- Assist in analyzing data and information to plan staff development to accomplish school goals.
- Assist with providing staff development opportunities and feedback to school personnel.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and provides frequent feedback to those involved in improvement efforts.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Provide feedback on professional performance and offer assistance to strengthen weaknesses in performance.

JOB DESCRIPTION

POSITION TITLE: Teacher

CONTRACT YEAR: Ten-Month Salaried - Annual Contract

QUALIFICATIONS

EDUCATION: Bachelor's degree from an accredited college or university;
Certifications: valid Iowa certification in the subject area.

EXPERIENCE PREFERRED: Experience - Two (2) years of successful classroom experience in the appropriate subject area.

REPORTS TO: Principal

POSITION GOAL: To create and maintain a classroom atmosphere that generates high expectations and enthusiasm for learning by infusing critical thinking skills, application skills, interpersonal skills, and technology into an aligned curriculum and assessment process, resulting in measurable achievement gains for all students.

SKILLS AND ABILITIES

The teacher shall:

- Possess knowledge of curriculum Standards in the appropriate subject area.
- Be able to adapt, design and implement curriculum to meet the needs of the individual students.
- Be able to suggest educational and classroom management strategies, materials and techniques to parents and other support personnel working with students.
- Be able to use observation techniques for identification, ongoing re-evaluation and planning for students.

ESSENTIAL PERFORMANCE RESPONSIBILITIES

The teacher shall:

DEMONSTRATE PROFICIENCY

- Demonstrate mastery of all state competencies

- Demonstrate mastery of all twelve of the teacher practices benchmarks for the 21st century at the professional and eventually the accomplished level
- Demonstrate knowledge and understanding of the subject matter
- Foster students' achievement gains from baseline assessment levels to be evident in pre/post test comparison results, standardized test scores, and portfolios
- Assist the administration and staff to develop and implement a school-wide behavior management system aligned to the Board's policies and procedures
- Provide supportive classroom management and academic strategies to teachers, students, and parents.

DEMONSTRATE INITIATIVE

- Demonstrate efficiency
- Demonstrate punctuality
- Demonstrate consistent attendance
- Review current developments, literature and technical sources of information related to job responsibility
- Initiate and present innovative ideas for special projects, school functions, field trips, extracurricular activities, and clubs
- Initiate opportunities for professional development
- Provide supplemental instruction.

PARTICIPATE IN CONTINUED PROFESSIONAL DEVELOPMENT

- Demonstrate oral and written proficiency
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments
- Pursue further education and supplemental credentials.

UNDERSTAND AND EMPLOY A VARIETY OF EDUCATIONAL TECHNOLOGIES, STRATEGIES, AND TEACHING STYLES

- Employ differentiated instructional strategies to maximize learning
- Role model using the state competency checklist
- Consistently maintain portfolios (dating and ordering each piece).

SERVE AS ROLE MODELS FOR STUDENTS AND FUTURE TEACHERS

- Role model using the state competency checklist
- Promote problem-solving skills and character education
- Promote and enforce school rules.

ADVISE PARENTS

- Keep parents updated through interim reports, report cards, phone calls, and notes home
- Encourage and facilitate parental and community involvement promoting student achievement
- Document parent phone calls, conversations, and conferences

- Work as partners to create behavior modification plans and create Progress Monitoring Plans (PMP) for students
- Maintain flexibility and frequent contact with parents about student progress and school events.

DEMONSTRATE AWARENESS OF EACH STUDENT'S EDUCATIONAL NEEDS

- Continually assess students' development through clearly defined rubrics
- Establish, maintain, assess, and (if needed) modify individual student progression plans
- Identify those students who exhibit exceptional thinking styles and behaviors and implement and/or accommodate those exceptional needs
- Assist in data collection and preparation of reports including individualized educational plans of instruction for students.

WORK COOPERATIVELY AND PRODUCTIVELY WITH CO-WORKERS

- Interact with maturity and professionalism among administration, staff, and students at all times
- Take initiative to implement projects, programs, and/or compensate for shortcomings within classroom and/or the school environment
- Exhibit congeniality among co-workers, students, and parents
- Show assertiveness - delegate when necessary
- Be a team player while respecting others differences
- Separate professional and personal spheres
- Be flexible - always have a back-up plan
- Be willing to help where help is needed.

FOLLOW GUIDELINES REGARDING SAFETY AND EDUCATION

- Supervise student recreation (having at least one person in the classroom at all times)
- Complete and maintain accident reports (keeping one in a permanent file and sending one copy to parents)
- Keep emergency numbers at hand and a stocked first aid kit accessible in classroom
- Maintain up-to-date lesson plans within curriculum guidelines
- Complete, distribute, and maintain files of all behavior and homework referrals as required (one in permanent folder, one sent home)
- Complete and maintain files of all report cards, interim reports, and county test records
- Follow safety requirements regarding aisles, doorways, fire alarms, and fire extinguishers at all times
- Participate in monthly fire and other safety drills
- Keep dangerous objects (knives, rocks, etc.) and toxic substances (ammonias, medicines, etc.) out of the reach of children at all times

- Follow appropriate medication guidelines for all students (remember never to give Tylenol, cough drops, or any prescription medications without the written consent of the parent and administrator and accompanied by the appropriate medical forms).

PARTICIPATE ACTIVELY IN SCHOOL FUNCTIONS

- Attend parent/teacher meetings and conferences
- Plan and participate in special events
- Perform other duties as assigned by the Principal.

JOB DESCRIPTION

POSITION TITLE: Guidance Counselor (Budgeted under contracted services)

CONTRACT YEAR: 10-12 Months

QUALIFICATIONS

EDUCATION: An earned master's degree from an accredited institution; certification in Guidance and Counseling. Bilingual skills preferred. Computer skills as required for the position.

REPORTS TO: Principal or designee

POSITION GOAL: To implement processes to help students through classroom guidance, individual academic planning, responsive services, and system support.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The Guidance Counselor shall:

- meet with parents/students prior to and during the registration process, inform the students of classes relative to course selection and assist the administration in the registration and scheduling process
- assist in development of the school's master schedule
- conduct follow-up meetings after the master schedule is developed to make any necessary changes in students' schedules
- conduct orientation meetings to provide information regarding class offerings and registration procedures
- provide individual counseling for students regarding scheduling upon request of the student or his/her parent/guardian
- counsel students on personal and academic concerns and notify parents as deemed necessary
- evaluate credits from outside sources
- provide training to teachers, parents and students on pupil progression plan
- provide materials and suggestions for classroom oriented guidance activities
- arrange student, parent and teacher conferences
- acquaint students new to the school with teachers, facilities and programs to help them adjust to their new environment
- assist in the early identification of students for proper educational placement, such as exceptional child, federal and bilingual programs
- work with parent groups in the area of child growth, development and discipline

- meet with teachers to present and explaining the results of various testing programs
- assist teachers in effective utilization of test results
- identify community and school system resources and when advisable, refer student situations to the proper agencies
- keep records of conferences and send reports within the limits of confidentiality, to the principal, administrative assistants, and/or teachers as requested
- gather information from all faculty members having contact with a student being considered for referral
- review current developments, literature and technical sources of information related to job responsibility
- ensure adherence to good safety procedures
- participate in professional growth activities and complete a professional development plan
- attend professional conferences and workshops related to the overall guidance program
- perform other duties as assigned by the Principal
- follow School, Board, and Sponsor policies as well as federal and state laws.

JOB DESCRIPTION

POSITION TITLE: English Learner (EL) Specialist/Teacher

CONTRACT YEAR: Ten (10) Months - Annual Contract

QUALIFICATIONS

EDUCATION: An earned bachelor's degree or higher from an accredited institution and Appropriate Certification Endorsement in EL

EXPERIENCE

REQUIRED: A minimum of four (4) years of combined successful work experience, which includes a minimum of two (2) years teaching experience in EL/bilingual education.

PREFERRED: Preferred degree major in Education or related field. Bilingual in English, Spanish and/or Creole preferred. Computer skills as required for the position.

SUPERVISES: EL Teachers, teachers and clerical personnel, as assigned.

POSITION GOAL: To develop, implement, coordinate and monitor EL curriculum for students assigned to the EL program.

ESSENTIAL PERFORMANCE RESPONSIBILITIES: The ESOL Coordinator/teacher shall:

- Coordinate the development of bilingual/EL curriculum guides and performance objectives for grades all grades at the school
- Coordinate the identification, assessment and placement of students in the bilingual/EL program
- Coordinate the ordering of materials and equipment needed to implement the bilingual/EL program
- Develop and assist to implement the school's bilingual/EL program
- Coordinate and attend LEP meetings and communicate with parents
- Coordinate testing for EL and monitor student LEPS
- Work with principals, teachers and personnel in the bilingual/EL program
- Coordinate the internal and external evaluation to maintain an effective feedback monitoring system in coordination with Program Evaluation
- Coordinate activities with early intervention programs to provide services for English Learners (ELs)
- Serve as a consultant on the matters pertinent to the bilingual/EL program

- Assist with interviews of potential bilingual/EL teachers
- Participate successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment
- Review current developments, literature and technical sources of information related to job responsibility
- Ensure adherence to good safety procedures
- Perform other duties as assigned by the Principal.

Job Descriptions

POSITION TITLE: Student With Disability Program Specialist

CONTRACT YEAR: Ten Months

QUALIFICATIONS

EDUCATION: Bachelor's degree in Education. Master's degree preferred. Must have certification in Student with Disability areas.

EXPERIENCE

REQUIRED: Must possess and maintain current Teaching Certification in Exceptional Student Education. Minimum of five (5) years of successful instructional experience in Exceptional Student Education.

REPORTS TO: School Principal

SUPERVISES: Special Education Teacher, teachers and clerical personnel, as assigned.

POSITION GOAL: The Specialist will conduct staff development activities designed to ensure a free and appropriate public education for all students with disabilities. This position will also assist the School Administrator and Program Specialists in managing all SWD functions within the schools and will ensure compliance in all areas of SWD.

ESSENTIAL PERFORMANCE RESPONSIBILITIES:

The ESE Specialist shall:

- Coordinates the referral, staffing, placement and re-evaluation process for exceptional student education at the school level, i.e., initials, IEP reviews, transfers, verification of placements
- Directs the use of all forms at the school level including referral and placement forms, IEP's, data entry, FTE, etc., in preparation for staffing's/meetings
- Maintains records and procedures specific to Exceptional Student Education for compliance purposes
- Serves as LEA (Local Education Agency) Representative at the Speech and Language staffing's and IEP meetings

- Acts as a resource to the school personnel regarding SWD rules, regulations, compliance requirements, program needs, school responsibilities, positive behavioral supports, discipline concerns, functional behavior assessments, behavior intervention plans, and other SWD related concerns including implementation of Individuals with Disabilities Education Act
- Provides periodic monitoring of Matrices, IEPs, re-evaluation dates and any other date specific requirements to ensure compliance for audit surveys
- Collaborates with school personnel and others for the development, coordination and implementation of appropriate staff development, e.g., workshops, updates, in-service, conferences, etc.
- Monitors the extent to which students' educational goals are being met in accordance with those outlined in the student's IEP
- Prepares and submits appropriate comprehensive written reports that include interpretation and synthesis of assessment data and other sources data upon request
- Assesses, in conjunction with ESE Program Specialist, the needs of school-based SWD teachers and programs
- Mentors and demonstrates effective teaching strategies to SWD teachers
- Assists schools in the decision-making process required for determining accommodations for students with disabilities participating in standard or alternative assessment
- Serves as liaison between school personnel, i.e., the guidance department, the administrators and the SWD staff
- Develops and implements activities promoting inclusive practices
- Attends workshops, conferences and meetings necessary to maintain and update professional knowledge.

JOB DESCRIPTION

POSITION TITLE: Registrar/Administrative Assistant

QUALIFICATIONS

EDUCATION: Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Program.

SKILLS: A well-rounded knowledge of clerical methods, procedures, and business office practice; must be computer literate. Computer skills as required for the position. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.

EXPERIENCE: One (1) year of previous school-work experience which demonstrated an expertise to perform various procedures and applications of a repetitive and routine nature following standard practices.

REPORTS TO: Administrator/Principal or designee

POSITION GOAL: To perform a wide variety of clerical duties with respect to registering students, processing and maintaining student records, and otherwise working with student schedules and data in a responsible and accurate manner.

ESSENTIAL PERFORMANCE RESPONSIBILITIES: The School Registrar shall:

- Process required forms and information to enroll new students and discuss the process with students and parents
- Maintain cumulative folders and permanent record cards in a secure manner
- Prepare various lists and reports in regard to student ranking, grade averages, graduation, reassignments, etc.
- Process withdrawal and transfer of students and verify that student obligations are settled
- Assist in determining credits and corresponding grade levels
- Receive and mail transcripts and other requested records, as authorized, and prepare related correspondence
- Follow instructions and established policies and procedures to perform specialized registrar duties referring questionable matters to the Guidance Director

- Review students' immunization forms to verify adherence to governmental requirements
- Operate standard office equipment such as any generation of typewriter, calculator, microcomputer, word processor, etc., as well as equipment developed or advanced from future technology as required by the job
- Interact effectively with the general public, staff members, students, teachers, parents, and administrators, using tact and good judgment
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment
- Review current developments, literature and technical sources of information related to job responsibility
- Ensure adherence to good safety procedures
- Perform other duties as assigned by the Principal or designee.

Appendix E: 7.3. Proposed Calendar and Daily Schedule.

Included below

- Proposed Daily/Bell Schedules
- Proposed High School Master Schedule
- Proposed Academic Calendar
- Proposed Course Catalog (High School Level)

Appendix E.

Middle School Bell Schedule

MON		TUE / THU		WED / FRI	
Period 1	9:30-10:10*	1	8:30-9:10	1	8:30-9:10
Period 2	10:15-10:55	2	9:15-9:55	2	9:15-9:55
Period 3	11:00-11:40	3	10:05-10:45	3	10:05-10:45
Lunch	11:45-12:25	4	10:50-11:30	4	10:50-11:30
Period 4	12:30-1:10	Lunch	11:35-12:05	Lunch	11:35-12:05
Period 5/6	1:15-2:40**	5/6	12:10-2:40	5/6	12:10-2:40
FLEX	2:45-3:30***	FLEX	2:45-3:30	FLEX	2:45-3:30

*Mondays are late start days for students. Teachers use the time for professional development.

**Courses occupying periods 5 and 6 alternate weeks, such that each week has only a period 5, or period 6. See discussion in section 9.1.

***The Flex period accommodates alternating sessions of PE, Pathways sessions, and individualized work time.

High School Bell Schedule

MON		TUE / THU		WED / FRI	
Period 1	9:30-10:15*	1	8:30-10:00	2	8:30-10:00
Period 2	10:20-11:00	3	10:05-11:35	4	10:05-11:35
Period 3	11:05-11:50	Lunch	11:35-12:15	Lunch	11:35-12:15
Lunch	11:50-12:30	5	12:15-1:45	6	12:15-1:45
Period 4	12:30-1:10	7 / FLEX	1:50-3:30	8 / FLEX	1:50-3:30
Period 5	1:15-2:00				
Period 6	2:05-2:50				
Period 7/8					
FLEX	2:55-3:30**				

*Mondays are late start days for students. Teachers use the time for professional development.

**The Flex periods accommodate alternating sessions of internships or service, PE, Pathways sessions, individualized work time.

High School Master Schedule

Note: This sample schedule represents courses likely to be needed by our entering 9th grade students. Schedule may be adjusted, within Iowa State requirements, according to student needs and interests.

	English	Math	Science	SS	FLEX	FLEX	Electives	Electives
Period 1	Foundations	Integrated 2	Environmental					
Period 2		Integrated 1					Spanish 1	Intro & Using AI (Fall) / Financial Decisions (Spring)
Period 3				World History			Spanish 2	Health
Period 4	Foundations	Pre-Algebra	Biology					
Period 5		Integrated 1					Intro to Art	
Period 6			Environmental	World History			Digital Foundations	
Flex/Period 7					PE/WIN/Pathways	Service/Intern.		
Flex/Period 8					PE/WIN/Pathways	Service/Intern.		

2023-2024 Academic Calendar

Note: This is a sample calendar based on the academic calendar of Cedar Rapids Community School District for 2023-24. The academic calendar will mirror that of the school district when it is released.

July 2023							August 2023							September 2023						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1			1	2	3	4	5						1	2
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30
30	31																			
October 2023							November 2023							December 2023						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7				1	2	3	4						1	2
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30
														31						
January 2024							February 2024							March 2024						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6					1	2	3						1	2
7	8	9	10	11	12	13	4	5	6	7	8	9	10	3	4	5	6	7	8	9
14	15	16	17	18	19	20	11	12	13	14	15	16	17	10	11	12	13	14	15	16
21	22	23	24	25	26	27	18	19	20	21	22	23	24	17	18	19	20	21	22	23
28	29	30	31				25	26	27	28	29			24	25	26	27	28	29	30
														31						
April 2024							May 2024							June 2024						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6				1	2	3	4							1
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8
14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
28	29	30					26	27	28	29	30	31		23	24	25	26	27	28	29
														30						

	Staff professional learning (no school for students)	Teacher Conferences							
	First day / last day of class	Fall: October 25-Nov 1 (none on Halloween)							
	Break (no school)	Spring: February 19-23							
	Late start for professional learning								
	Teacher comp day (no school for students)								
	Inclement weather make-up								
S	End of Semester								

Catalog of Courses

Quest Forward Charter School

High School Level

This is a prospective catalog of courses envisioned for Quest Forward Charter School.

English

Foundations of English

Length: Full Year

Grade levels: 9th

Prerequisites: none

This English course is all about developing skills of reading, writing, and analysis while exploring one's values, background, and strengths. Who are you? What do you believe? How do you connect with people? In this course students will have the opportunity to develop their own voices and build a foundation for reading, writing, and thinking to carry them through their English courses and into college and careers. Students will read across genres, cultures, and media as they examine shared themes and questions with immediate relevance to their own lives. This course asks students to make important connections between individual concepts or texts and the world around them as they work both within and outside of traditional, canonical literature.

Intermediate English

Length: Full Year

Grade levels: 10th

Prerequisites: Foundations of English

Intermediate English engages students in asking big questions and exploring how different people in different time periods consider and answer these questions across genres and media. The central goal for this course is giving students a specific focus or theme through which to read and engage with texts. This focused theme allows students to develop compare and contrast skills, practice analysis through a specific lens, and recognize common problems and solutions. The topics covered in this yearlong course affect students on a daily basis, and students are able to make immediate and relevant connections between the creative works they read and their own lives.

American Literature

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Intermediate English

This course provides a chronological survey of American literature with a focus on freedom. How is freedom defined throughout American literature? How is it defined differently by different authors, in different time periods, and in different genres and media? Student work on this topic culminates in a final, independent research project answering the question “how is freedom defined in American literature?”

The course includes four units, each covering a specific period of American literature. Within each unit, students learn essential skills that culminate in the completion of the research project. Texts may include work from the American Founders, Herman Melville, Emily Dickinson, Ralph Waldo Emerson, Frederick Douglass, Elizabeth Cady Stanton, F. Scott Fitzgerald, Ernest Hemingway, and Arthur Miller.

Communications and Media

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Intermediate English

The Communications and Media course prepares students to be effective communicators about what they want to say and effective critical thinkers about what they see in texts, broadly defined. The first half of Communications focuses on developing students’ skills in communicating effectively in situations they’ll encounter as they transition out of high school and into the next stage of their lives. Its focus is on practical and professional communication. While the first half of the Communications course focuses on students’ own communication, the second half focuses on how texts in the world communicate both personally and globally. This half of the course prepares students to think critically about the media they encounter in their lives beyond the classroom. Brought together, the two semesters of the course prepare students to transition into society as adults, bringing to fruition the reading, writing, speaking, and analysis skills they have developed during their first three years of high school.

Great Books: Greece to the Renaissance

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Intermediate English

In this course, students encounter some of the seminal works of literature in the Western tradition. Starting with Greek drama, the course encompasses selections from the Medieval

period, Shakespeare, and Cervantes. Each text is studied for its own style, story, and themes, as well as for its contributions and innovations to this tradition. Students will consider characteristics of genres and periods, as well as other literary features. Written analysis will complement student discussion in a participatory seminar format.

Great Books: World Literature

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Intermediate English

In this course, students encounter some of the seminal works of literature in the modern Western tradition. Texts will include selections from the comedy and satire of Swift and Molière, 19th century literature, and modern English and American literature. Each text is studied for its own style, story, and themes, as well as for its contributions and innovations to this tradition. Students will consider characteristics of genres and periods, as well as other literary features. Written analysis will complement student discussion in a participatory seminar format.

Mathematics

Pre-Algebra

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: Placement

The objective of this course is to prepare students for Integrated Mathematics 1 the following year. This course provides a foundation in Algebra involving concepts from Geometry and Statistics as well. Students will develop and practice skills that involve logical reasoning and problem solving. In keeping with the school's orientation toward problem solving and relevance, the course is designed to clearly connect the concepts and computational competencies developed in the course with their application in a variety of contexts. Students will complete projects at the end of each unit that apply the topics learned in the unit to solve a real-world problem.

Integrated Math 1

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: Placement

Integrated Mathematics 1 is a year-long, comprehensive mathematics course centered around algebraic reasoning, sense making, problem solving, and critical thinking. Students are

provided with the opportunity to engage in meaningful mathematical investigations, using a variety of tools of investigation. Additionally, this first-year high school mathematics course introduces students to the mathematical practices, as students experience mathematics from a variety of perspectives.

Integrated Math 2

Length: Full Year

Grade levels: 10th, 11th

Prerequisites: Integrated Math 1

J. Michael Shaughnessy, past President of the National Council of Teachers of Mathematics states, “Exposure to relevant applications of algebra integrated with statistics and geometry throughout a high school student’s learning of mathematics will help instill more meaning and sense making in his or her algebra experience and lay a foundation for transition options to college mathematics.” This is the premise upon which this course is built. Traditional topics from geometry, with topics from algebra that have a natural connection, as well as geometric applications of probability and an introduction to trigonometry blend together to form this course.

Integrated Math 3

Length: Full Year

Grade levels: 10th, 11th, 12th

Prerequisites: Integrated Math 2

Integrated Mathematics 3 is designed to provide students with an opportunity to engage in worthwhile mathematical investigations while they continue algebra mastery with higher-degree equations, additional variables, logarithms and much more. Students develop a deep understanding of the key mathematical concepts, principles, and theories drawn from contextual applications. Students synthesize and generalize what they have learned about a variety of function families and explore the effect of transformations on the graphs of diverse functions. They apply skills by posing questions and investigating phenomena through the language, procedures, and tools of mathematics. With the level of mathematical rigor provided in this course, students develop an awareness of how engineering, technology, and science are integrated into the historical and cultural advancement of mathematics. Students will also study topics in probability and statistics.

Precalculus

Length: Full Year

Grade levels: 10th, 11th, 12th

Prerequisites: Integrated Math 2, placement

Precalculus provides the opportunity for students to acquire a solid foundation in algebra and trigonometry, preparing them for future courses such as calculus. Students explore a variety of ways in which algebra and trigonometry can model and solve authentic real-world problems. This course is designed to enable students to develop problem-solving skills while fostering critical thinking, within an engaging setting. The main theme of this course is the idea of expanding a domain to broader and deeper into a topic. The studies in this course are framed within the context of authentic problem-solving, not just solving problems. Just as this theme is carried out with the first two units of algebraic functions and transcendental functions, the conic sections, parametric equations and polar coordinates are presented through real-world connections. The course closes with the study of sequences and series, both finite and infinite, extending to limits, as the bridge between precalculus and calculus is introduced.

Calculus

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Precalculus

This course provides the opportunity for students to discover the application and beauty of calculus. Students will be able to explore the utility of calculus while developing technical competence in the subject. Topics will be examined geometrically, numerically, and algebraically to assist with conceptual reasoning.

In keeping with the school's orientation toward problem solving and relevance, the course is designed to clearly connect the concepts and computational competencies developed in the course with their application in a variety of contexts. Students will complete projects at the end of each unit that apply the topics learned in the unit to solve a real-world problem. Each successive unit builds upon the skills and topics learned in previous units which will result in students using many aspects of calculus to describe a real-world situation.

Great Books: History of Mathematics

Length: Semester

Grade Levels: 11th, 12th

Prerequisites: Integrated Math 3 or Precalculus

This semester-long Great Books course in the history of mathematics provides interested students with a primary-text exploration of the development and exploration of transformative mathematical advances, including works by Euclid, Archimedes, Descartes, Newton, Leibniz, Dedekind and Lobachevsky. In a seminar setting, students will examine the original works and the ideas and arguments they contain, in addition to reconstructing the context and the advance represented by the work,

Science

Environmental Science

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: none

Environmental Science provides an interdisciplinary introduction to concepts, processes, and methods across the core scientific disciplines in the context of studying life on our planet. The course will be structured around a sequence of in-depth explorations that will engage students in local resources and natural spaces. Students will develop, in particular, fundamental scientific skills including observation, measurement, data collection and analysis, modeling, and constructing and supporting explanations of natural phenomena.

Biology

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: placement

This course engages students in the study of life from its foundational components and processes, through principles of heredity and evolution. The skills focus for this course is on designing and conducting investigations, making models, analyzing collected data, making evidence-based claims, composing explanations, and presenting conclusions. Students will also examine topical applications of these concepts in emerging areas like gene editing.

Chemistry

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: Integrated Math 2

Chemistry students learn about and explore the structures and properties of matter, its transformation, and the interactions of matter and energy. Areas of study include the theory of the atom, structure and use of the periodic table, chemical nomenclature and bonding, stoichiometry, equilibrium, acids and bases, and thermochemistry. Students will develop their laboratory skills through experimentation and careful attention to protocols, in addition to their ability to ask experimental questions and use math in a scientific context.

Physics

Length: Full Year

Grade levels: 10th, 11th, 12th

Prerequisites: Environmental Science; Integrated Mathematics 1

This physics course takes an in-depth approach to scientific concepts and principles, the learning of these will be achieved through model-based inquiry (MBI) and project-based learning (PBL). In this way, students will experience physics through doing. This course integrates science and engineering practices, crosscutting physics concepts, and core ideas. Students work collaboratively on project designs, test their designs to generate data, assess that data, and make evidence-based improvements to their initial design process.

The overarching narrative for this course is based on “systems”, which have properties determined by the characteristics and interactions of their constituent sub-structures. Students are presented with the Project Challenge at the start of the unit and then, to demonstrate their learning, share their results, experience, and conclusions.

Advanced Science Research

Length: Full Year

Grade levels: 11th, 12th

Prerequisites: Chemistry or Physics

Advanced Science Research is a year-long lab-based inquiry into various scientific topics. Having completed introductory courses in core science domains, students in this course are able to focus even more explicitly on critical practices in scientific research. Students learn and practice strategies for note-taking, following lab protocols and creating lab-reports, engaging in the engineering and design process, reading and comprehending scientific journal articles, and presenting scientific findings in different formats. The skill- and research-orientation of this course allows some degree of flexibility in the scientific topics that are paired with the target scientific practices, so there is some room for student interests to shape the topics. Along the way, students acquire experience with more specialized lab tools and techniques they might encounter in a college setting.

Great Books: History of Science

Length: Semester

Grade Levels: 11th, 12th

Prerequisites: Chemistry or Physics

This semester-long Great Books course charts the development in methods, theorizing, and experimentation in the history of science from the Greeks to relativity. Greek natural science and medicine are followed by Enlightenment innovations in astronomy, physics, and optics before the development of evolutionary theories and modern physics. In addition to the works themselves, students will consider themes and questions such as how the modern scientific disciplines emerged from the tradition of natural philosophy.

Social Studies

World History

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: None

The year-long World History course comprises four units: Introduction to Social Sciences, Sharing the World, Modern Movements, and Our World. The course uses the concept of globalization as a central organizing theme. Assuming most rising ninth graders have had only rudimentary exposure to social sciences, the first unit offers an introduction to the main disciplines including history, geography, economics, and government, and basic skills such as reading maps and charts. The course then dives more deeply into the Iowa world history standards.

US History

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: Foundations of English

Freedom in US History is a full-year chronological survey of United States history from first contact through the modern era of the twenty-first century. Students are challenged to define, measure, and redefine freedom as they move through the course. How do they define freedom initially? What is unique about American freedom? How have Americans struggled to attain and retain freedom across time? How does exploring American freedom affect one's own understanding of what it means to be free?

In semester one, primary sources, research, and inquiry guide students in their exploration of the concept of freedom from first contact in the colonial era through the end of Reconstruction (1492-1877). Semester two covers the critical periods from the Civil War through the War on Terror (1877 to the present). Each semester comprises two parts emphasizing reading, writing, and critical thinking about the past in ways that allow students to build skills enabling them to apply historical analysis and historical concepts in new situations. Throughout the course, students engage in research, critical thinking, and analysis, culminating in a substantial research paper integrating primary and secondary sources and advancing a unique argument about freedom in US history.

American Government

Length: Half year (.5 units)

Grade Levels: 11th and 12th

Prerequisites: US History (corequisite)

This one-semester course offers a survey of the main documents, political structures, ideas, and institutions that form and shape the American government. Students can expect to engage actively with the US Constitution, landmark Supreme Court rulings, and other foundational documents that constitute the basis for informed citizenship. While focusing on the necessary content, the course will also develop historical skills and emphasize experiential learning and projects. Students will come away with an understanding of how government works and of the civic rights and responsibilities of informed citizens.

This course helps prepare students to be informed and engaged participants in US civic life, and to understand civic responsibilities. The course focuses on how government impacts students now, and how it will figure in roles they choose for the future. As appropriate, the course will steer toward current events, student participation in local and school governance, and simulations of democratic processes.

Economics

Length: Half year (.5 units)

Grade Levels: 11th and 12th

Prerequisites: Integrated Math 1

Studying economics, besides understanding the data behind it, requires us to consider some very human kinds of questions. What do we value? Why do we value it? How do we ensure that everyone has fair access to the needs of life? These questions often have different answers, depending on the time and place.

Great Books: Political History

Length: Full Year (1 unit)

Grade Levels: 11th and 12th

Prerequisites: US History

The classic texts studied in this course are not just about history, but are also have shaped and been shaped by other events and ideas. Accordingly, in reading selections from original texts from Homer and Herodotus to the Stoics, Machiavelli, and others, students practice historical skills in considering the growth and transmission of concepts, emerging disciplines and methodologies, and the impact of these ideas on the historical stage. This course also provides a more granular, primary-text approach to the events and figures studied in the other courses in the Social Studies sequence.

Great Books: The American Founding and Since

Length: Full Year (1 unit)

Grade Levels: 11th and 12th

Prerequisites: Great Books: History of Ideas 1

In this sequel to Great Books: Political History, students continue tracing the development of historically influential and still relevant political ideas. The course picks up at the Enlightenment and its influence on the revolutions in America, France, and elsewhere. It touches also on great works in political economy and political and social reform, concluding with 20th century theorizing about liberty and education. Students discuss these ideas and their historical dimensions in participatory seminars and engage them critically in writing.

World Languages

Spanish 1

Length: Full Year

Grade levels: 9th, 10th

Prerequisites: None

Spanish 1 provides an introduction to the Spanish language. Students learn basic conversation such as how to introduce themselves and ask clarifying questions and foundational grammar and vocabulary such as numbers, colors, days of the week, clothing, food, weather, etc.

Spanish 2

Length: Full Year

Grade levels: 10th, 11th, 12th

Prerequisites: Spanish 1, equivalent, or by placement

Spanish 2 takes students deeper into the Spanish language by building the vocabulary and grammatical skills necessary to increase their ability to communicate in more complex sentences and within a diversity of social contexts. Students develop communicative skills in all three modes of communication and gain cross-cultural understanding through a blended learning model using various resources, including interactive lessons, real-time conversations, reading, writing, videos, songs, games and Comprehensive Input stories which are implemented during the course to enrich cultural aspects of the language, geography, and oral communication skills. As students learn the structure of the language, past tenses, and more vocabulary through the immersion method, the curriculum gives them a deeper knowledge and understanding of the rich cultural and social contexts of Hispanic countries, thus allowing them to become more global citizens. Students completing this course will attain a proficiency level of advanced beginner to low intermediate depending on individual student ability, effort, and review outside of the classroom.

Spanish 3

Length: Full Year

Prerequisites: Spanish 2 or equivalent

Grade levels: 10th, 11th, 12th (9th by placement)

Students will continue to expand knowledge acquired in previous Spanish classes by increasing their vocabulary, grammar, and use of idiomatic expressions. They will speak and write using short and long sentence structures in the present, past, and future tenses in the indicative mood to communicate about self, family, daily life, and develop a fuller knowledge of the arts, literature, and culture of the Spanish-speaking world. The development of their Spanish speaking skills will be improved using dialogues, interviews, and oral presentations that can be used in real-world interactions. Students will further develop their Spanish comprehension, writing, and listening skills within the context of the contemporary Spanish-speaking world and its cultures by engaging in a variety of authentic activities utilizing film, music, stories and Spanish literature and articles.

Spanish 4

Length: Full Year

Grade levels: 10th, 11th, 12th

Prerequisites: Spanish 3

For students who have completed three full years of Spanish, Spanish 4 offers an immersion course in which they can learn in detail the use of the language to explore the geography and culture of Spanish-speaking countries. The grammar will be fully reviewed while reading, writing, and conversing. This is an upper level course that requires significant independent work and includes tasks like short reports, multimedia presentations, and independent reading. Students completing this course will attain a level of advanced-medium to high proficiency depending on student ability, effort invested in the class, and time studying outside the classroom.

Fine Art

Introduction to Art

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

Introduction to Art is a basic foundations course which analyzes and interprets art's elements in different media. Students experience various studies in media processes and techniques in drawing, painting, lettering, graphics, and ceramics. Topics are varied and open to change through the academic year. Student work stresses skill development, creative interpretations, meeting competence levels, and building a foundation in art principles. Students will learn about the various ages in art and critique master works as well as their own work and that of their peers. All students will display their works in various venues throughout the school and community throughout the year.

Topics include:

Artistic Perception: Creating, performing and participating in art

Creative Expression: Knowing and using art materials and resources

Aesthetic valuing: Responding to and analyzing works of art

Theater

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

The goal for this course is for students to develop a working knowledge of the foundations of theater arts. Students will investigate and analyze the history of theater, the role theater plays in different eras, and how drama has changed over time. Students will also identify and compare different genres of theater and how styles of acting influence culture and behavior. Each academic term will have an overarching focus/theme such as comedy, avant garde theater, and creating your own play, plus a play to be performed at the end of the term. Sample plays might include Shakespeare's *Julius Caesar*, *Trifles* by Susan Glaspell, and *10 Ways to Survive the Zombie Apocalypse* by Don Zolidis.

Digital Foundations

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

Digital tools and modes of presentation increasingly dominate different aspects of our daily and professional lives, including how we communicate and tell our stories. In this course, students will learn a range of skills, principles, and concepts surrounding digital artistic expression, consistent with the National Core Arts Standards. Students will also gain familiarity with the use of various digital platforms for creating original projects (such as Adobe Photoshop) that will support their work in digital creativity across the curriculum. Skills of critique and interpretation in the digital medium will also make them more judicious consumers of digital images, videos, and other presentations.

Other

Understanding and Using AI

Length: Half Year (.5 units)

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

In a few short months, publicly available artificial intelligence tools including large language models gained widespread use and promised to transform countless professions and traditional practices, including education! This course will help students better understand and work with these new tools. Students will learn and experiment with the fundamental concepts in computer science and artificial intelligence, along with standard algorithms and methods. They will explore ways to use AI productively and responsibly to support their work and learning, engage ethical questions related to its use, and think carefully about how it might affect different careers and the overall future of work.

Financial Decision Making

Length: Half Year (.5 units)

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

In this half-year course, students develop a foundational understanding of finances, money, and credit. They evaluate their own financial knowledge and practices, articulate and research their post-secondary plans, and begin to develop a sense of the challenges and costs of living on their own. In addition, students work to understand the process and implications of paying bills, purchasing insurance of varying types, making investments, creating a savings plan, and being an informed consumer. They explore making major purchases and how to plan for the unexpected as they make short- and long-term financial goals.

Health

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

This year-long course teaches students the information, practices, perspectives, and resources central to personal health. The course covers topics prescribed by the Iowa State Health Standards.

Physical Education

Gym-Based Physical Education

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

The goal for this course is for students to develop their awareness and appreciation of their own physical abilities. Students will investigate methods of improving physical fitness, and also engage with activities that help to keep the whole person healthy—mentally, physically, and emotionally. Students will also identify and compare different sports and other games, and get experience with playing a variety of individual and team-based sports. Each academic term will have an overarching theme such as boosting physical fitness, setting SMART fitness goals, and tracking daily habits to learn more about personal physical education style.

Outdoor Physical Education

Length: Full Year

Grade levels: 9th, 10th, 11th, 12th

Prerequisites: None

In this course, students develop their awareness and appreciation of their own physical abilities while also taking advantage of nature. Outdoor education is an active way to learn ecology, geology, teambuilding, outdoor skills, outdoor recreation, and natural and cultural history. Activities include, nature games, team building games, challenge courses, hiking, jogging, walking, and general fitness.

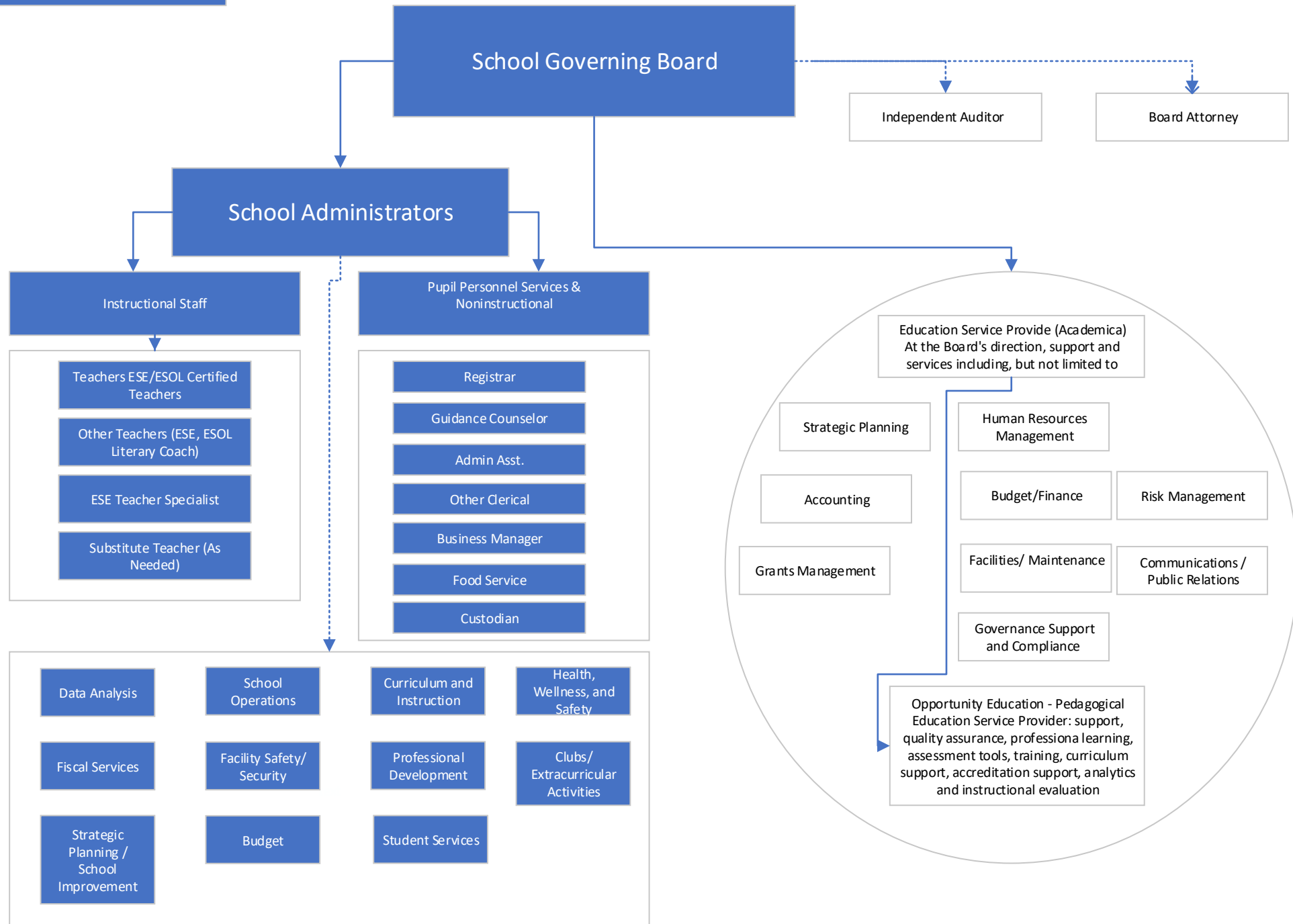
Students will investigate methods for improving physical fitness, and also engage with activities that help to keep the whole person healthy—mentally, physically, and emotionally. Each academic term will have an overarching theme such as boosting physical fitness, setting SMART fitness goals, and tracking daily habits to learn more about personal physical education style.

Appendix F: Proposed Organizational Structure.

Included below

- Proposed Organizational Structure

Appendix F



Appendix G: 7.2. Proposed Recruitment and Development of Administration, Staff, and Governing Board.

Included below

- Sample Employee Handbook

School
Employee Handbook

Sample

INTRODUCTORY STATEMENT

The School has entered into a strategic relationship with ADP TotalSource. ADP TotalSource is a human resources management firm in a business popularly referred to as a "Professional Employer Organization (PEO)." With the ever-changing pattern of employee relations, The School has enlisted the services of ADP TotalSource to help administer payroll, provide employee benefits and assist with human resources and risk management. Under this arrangement, both The School and ADP TotalSource are your employers and have certain rights and responsibilities with respect to your employment. As your PEO, we want to do our part to assist in making your job more fulfilling. Our goal is to provide you with the best benefits and employee services possible. Together, we can achieve great things.

This Employee Handbook is designed to acquaint you with The School and ADP TotalSource and provide you with information about working conditions, employee benefits, and some of the policies affecting your employment. You should read, understand, and comply with all provisions of the handbook. It describes many of your responsibilities as an employee and outlines the programs developed by The School and ADP TotalSource to benefit employees. One of our objectives is to provide a work environment that is conducive to both personal and professional growth.

While every attempt has been made to create these policies consistent with federal and state law, if an inconsistency arises the policy(s) will be enforced consistent with the applicable law.

No Employee Handbook can anticipate every circumstance or question about policy. As The School continues to grow, the need may arise to revise the Employee Handbook. ADP TotalSource and The School reserve the right to revise, supplement, or rescind any policies or portion of the Employee Handbook from time to time as it deems appropriate, in its sole and absolute discretion. The only exception to any changes is our employment-at-will policy permitting you or The School to end our relationship for any reason at any time. Employees will, of course, be notified of such changes to the handbook as they occur.

Your Employee Handbook will supersede any previous policy manual or Employee Handbook that may have been provided to employees at your School prior to your relationship with ADP TotalSource. These policies are not a legal document or an employment contract.

Important Contact Information

ADP MyLife Advisors at (844) 448-0325

Employee Assistance Program (see Policy 3-11) (888) 231-7015

ADP TotalSource Website www.adptotalsource.com

Academica (305-669-2906) Amy Nunez, HR Manager or email hrsupport@academica.org

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WELCOME!

Welcome Employee!

The School and ADP TotalSource wish you every success. We believe that each employee contributes directly to The School's growth and success, and we hope you will take pride in being a member of our team.

This Employee Handbook was developed to describe some of the expectations of our employees and to outline the policies, programs, and benefits available to eligible employees. Employees should familiarize themselves with the contents of the employee handbook as soon as possible, for it will answer many questions about employment with The School and ADP TotalSource.

We hope that your experience here will be challenging, enjoyable, and rewarding. Again, welcome!

Sincerely,

Maria Black
Area President
ADP TotalSource

ORGANIZATION DESCRIPTION

The School wishes to provide you with the best benefits and employee services possible. Therefore, The School has contracted the services of ADP TotalSource, Inc. a Professional Employer Organization, which will be responsible for providing, at the direction of The School, human resource services, a comprehensive benefits and retirement package to you at the start of your employment. Under its co-employment agreement with The School, ADP TotalSource will be your employer of record.

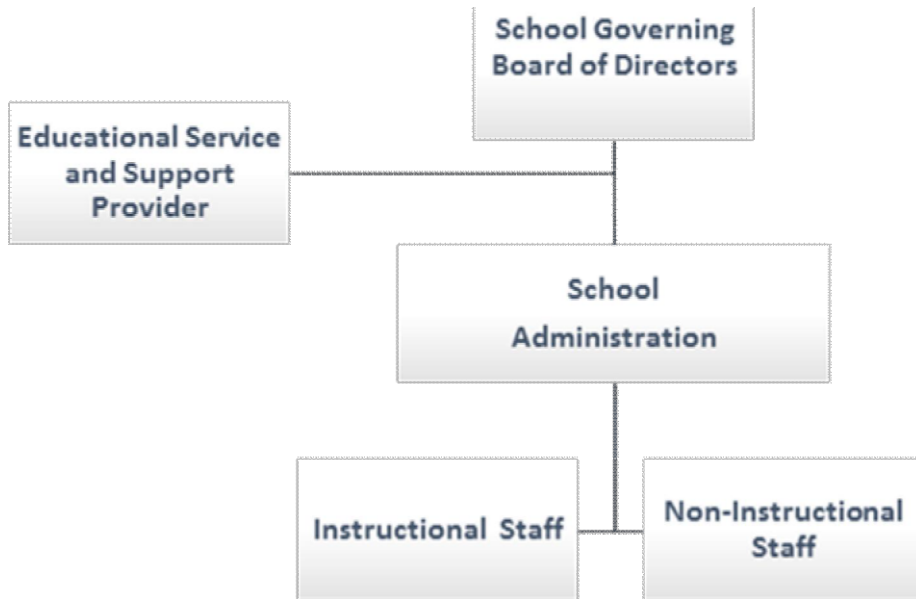
Ultimately, the success of The School depends on you and you are an important asset to the education program. The School wants to create the best environment for you by providing encouragement and recognition to develop your talents as an educator.

This employee handbook ("Handbook") is a source of information about payroll, privileges, benefits, and procedures, along with a few general rules and policies. It is to advise you of certain policies that may affect your employment. This Handbook is not a legal document and should not be construed as creating any kind of employment contract, since The School reserves the right to add, change or delete benefits and policies, as it deems.

The School, upon resolution by its Board of Directors, reserves the right to amend, add or change the policies, protocols, procedures and/or employee benefits listed or offered in this Handbook, including any supplements at any time it deems necessary. Please contact the *Academica HR Department* via *phone (305-669-2906) or email hrrsupport@academica.org*

We look forward to working with you to provide quality educational services to the students and parents we serve.

Organizational Chart



School Board of Directors for The School

The Board of Directors of The School has the overall responsibility for the affairs and management of The School. The Board will be the primary policy making body for The School. The Board includes members who are experienced both in the establishment of Charter Schools and in the structure and control of business enterprises. Each Director will take on a proactive role in specific areas that reflect his or her area(s) of expertise.

Academica

The Board of Directors will utilize the services of Academica, a professional educational service and support organization that specializes in providing services to charter schools. Academica is currently providing services to over 120 charter schools nationwide. Academica was founded on the principle that each charter school is a unique educational environment that is governed by a board that best knows the right path for its school. Academica's mission is to facilitate the Board's vision for its school.

If you are uncertain about whom to contact at any time regarding any matter or situation, please contact the ***Academica HR Department via phone (305-669-2906) or email hrrsupport@academica.org***

School-Site Administrator

The School's on-site administration will consist of the Principal, Assistant Principal(s) or Lead Teacher and secretarial staff who will be responsible for working with the teaching staff, addressing student-related issues, assisting in curriculum development, and overseeing the parental involvement agreements. The Principal of your school is considered your direct supervisor, and is responsible for, in conjunction with the Assistant Principal(s) or Lead Teacher, training and the day-to-day supervision of your work.

All questions regarding your school's position should be directed to your Principal.

Sample

EMPLOYEE ACKNOWLEDGEMENT FORM

The employee handbook describes important information about The School and ADP TotalSource, and I understand that I should consult the Human Resources Manager regarding any questions not answered in the handbook. I have entered into my employment relationship with The School and ADP TotalSource voluntarily and acknowledge that there is no specified length of employment. Accordingly, either I or The School or ADP TotalSource can terminate the relationship at will, with or without cause, at any time, so long as there is no violation of applicable federal or state law.

Since the information, policies, and benefits described here are necessarily subject to change, I acknowledge that revisions to the handbook may occur, except to ADP TotalSource's policy of employment-at-will. All such changes will be communicated through official notices, and I understand that revised information may supersede, modify, or eliminate existing policies.

Furthermore, I acknowledge that this handbook is neither a contract of employment nor a legal document. I have received the handbook, and I understand that it is my responsibility to read and comply with the policies contained in this handbook and any revisions made to it.

EMPLOYEE'S NAME (printed): _____

EMPLOYEE'S SIGNATURE: _____

DATE: _____

Section 1 - Governing Principles of Employment

1-1. Equal Employment Opportunity

The School is an Equal Opportunity Employer that does not discriminate on the basis of actual or perceived race, creed, color, religion, alienage or national origin, ancestry, citizenship status, age, disability or handicap, sex, marital status, veteran status, sexual orientation, genetic information, arrest record, or any other characteristic protected by applicable federal, state or local laws. Our management team is dedicated to this policy with respect to recruitment, hiring, placement, promotion, transfer, training, compensation, benefits, employee activities and general treatment during employment.

The School will endeavor to make a reasonable accommodation to the known physical or mental limitations of qualified employees with disabilities unless the accommodation would impose an undue hardship on the operation of our business. If you need assistance to perform your job duties because of a physical or mental condition, please let your supervisor know. Employees may also contact the ADP MyLife Advisors at (844) 448-0325.

The School will endeavor to accommodate the sincere religious beliefs of its employees to the extent such accommodation does not pose an undue hardship on the Company's operations. If you wish to request such an accommodation, please speak to your supervisor. Employees may also contact the ADP MyLife Advisors at (844) 448-0325.

If you feel that you have been subjected to conduct which violates this policy, you should immediately report the matter to your supervisor. If you are unable for any reason to contact this person, or if you have not received a satisfactory response within five (5) business days after reporting any incident of what you perceive to be a violation of this policy, please contact your second level supervisor.

Note: If your supervisor or next level manager is the person toward whom the complaint is directed you should contact any higher level manager in your reporting chain. Employees may also contact the ADP MyLife Advisors at 800-554-1802 if they are uncomfortable for any reason using the above procedure. The Company will not allow any form of retaliation against individuals who raise issues of equal employment opportunity.

If you feel you have been subjected to any such retaliation, report it in the same manner you would report a perceived violation of this policy. To ensure our workplace is free of artificial barriers, violation of this policy including any improper retaliatory conduct will lead to discipline, up to and including discharge.

1-2. Non-Harassment

It is The School's policy to prohibit intentional and unintentional harassment of any individual by another person on the basis of any protected classification including, but not limited to, race, color, national origin, disability, religion, marital status, veteran status, sexual orientation or age. The purpose of this policy is not to regulate our employees' personal morality, but to ensure that in the workplace, no one harasses another individual.

If an employee feels that he or she has been subjected to conduct which violates this policy, he or she should immediately report the matter to their Supervisor. If the employee is unable for any reason to contact this person, or if the employee has not received a satisfactory response within five (5) business days after reporting any incident of what the employee perceives to be harassment, the employee should contact the next level Manager. If the person toward whom the complaint is directed is one of the individuals indicated above, the employee should contact any higher-level manager in his or her reporting hierarchy. Employees may also contact the ADP MyLife Advisors at (844) 448-0325 if they are uncomfortable for any reason using the above procedure. Every report of perceived harassment will be fully investigated and corrective action will be taken where appropriate. All complaints will be kept confidential to the extent possible, but confidentiality cannot be guaranteed. In addition, the Company will not allow any form of retaliation against individuals who report unwelcome conduct to management or who cooperate in the investigations of such reports in accordance with this policy. If an employee feels he or she has been subjected to any such retaliation, he or she should report it in the same manner in which the employee would report a claim of perceived harassment under this policy. Violation of this policy including any improper retaliatory conduct will result in disciplinary action, up to and including discharge. All employees must cooperate with all investigations.

1-3. Sexual Harassment

It is the School's policy to prohibit harassment of any employee by any Supervisor, employee, customer or vendor on the basis of sex or gender. The purpose of this policy is not to regulate personal morality within the Company. It is to ensure that at the Company all employees are free from sexual harassment. While it is not easy to define precisely what types of conduct could constitute sexual harassment and there is a wide range of behavior that may violate this policy even if such behavior does not violate the law, examples of prohibited behavior include unwelcome sexual advances, requests for sexual favors, obscene gestures, displaying sexually graphic magazines, calendars or posters, sending sexually explicit e-mails, text messages and other verbal or physical conduct of a sexual nature, such as uninvited touching of a sexual nature or sexually related comments. Depending upon the circumstances, improper conduct also can include sexual joking, vulgar or offensive conversation or jokes, commenting about an employee's physical appearance, conversation about your own or someone else's sex life, or teasing or other conduct directed toward a person because of his or her gender which is sufficiently severe or pervasive to create an unprofessional and hostile working environment.

If you feel that you have been subjected to conduct which violates this policy, you should immediately report the matter to your Supervisor. If you are unable for any reason to contact this person, or if you have not received a satisfactory response within five (5) business days after reporting any incident of what you perceive to be harassment, please contact the next level Manager. Note: If your Supervisor or next level Manager is the person toward whom the complaint is directed, you should contact any higher level Manager in your reporting chain. Employees may also contact the ADP MyLife Advisors at (844) 448-0325 if they are uncomfortable for any reason using the above procedure. Every report of perceived harassment will be fully investigated and corrective action will be taken where appropriate. All complaints will be kept confidential to the extent possible, but confidentiality cannot be guaranteed. In addition, the Company will not allow any form of retaliation against individuals who report unwelcome conduct to management or who cooperate in the investigations of such reports in accordance with this policy. If you feel you have been subjected to any such retaliation, report it in the same manner you would report a claim of perceived harassment under this policy. Violation of this policy including any improper retaliatory conduct will result in disciplinary action, up to and including discharge. All employees must cooperate with all investigations.

1-4. Immigration Law Compliance

The School and ADP TotalSource are committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin.

In compliance with the Immigration Reform and Control Act of 1986, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility. Former employees who are rehired may also be required to complete the form.

Employees with questions or seeking more information on immigration law issues are encouraged to contact the ADP MyLife Advisors at (1-800-554-1802). Employees may raise questions or complaints about immigration law compliance without fear of reprisal.

1-5. Termination of Teaching Agreement

The School may terminate this Agreement as follows:

1. For a Teacher in her first year with The School, a decision by the Administrator to discontinue employment after the 90-day evaluation/probation period.
2. An unsatisfactory result of background, fingerprinting, and/or drug screenings at anytime during employment.

3. For failure to perform the duties required of the Teacher, or for a transgression by the Teacher which endangers the safety of anyone at The School or which involves conduct that is disruptive to the operation of The School or the academic advancement of The School. In such case, The School may require the Teacher to immediately cease presence and activity at The School.
4. For illness, accident or disability that incapacitates the Teacher for a period of more than 60 days (FMLA excluded).
5. For cause. The Teacher agrees that the following events may result in her/his termination, yet are not exhaustive. School may terminate this Agreement, during its term, for any of the following acts by the Teacher: (i) failure to perform her/his essential duties; (ii) dishonesty; or (iii) gross misconduct or gross dereliction of duty; or (iv) misrepresentation or other acts of moral turpitude or criminal conduct; or (v) insubordination; or (vi) obtainment of a score of failure on a formal teacher evaluation system conducted by the administration; or (vii) failure to complete daily responsibilities such as lesson plans, grading, parent conferences, etc.; or (viii) participating in illegal or questionable activities that would reflect negatively on The School such as drinking alcohol outside school premises while wearing The School uniform or school emblem; or (ix) use of inappropriate language within the classroom or in the presence of students; (x) loss of any local or state certification required.
6. Upon termination of employment created hereby, whatever may be the cause of such termination, The School shall pay to the Teacher any compensation earned by the Teacher up to the date of termination and the Teacher shall accept such payment as full discharge and release of The School from any further obligations to the Teacher.
7. It is mutually covenanted and agreed that the Teacher desiring to terminate this contract is required to give, in writing, thirty (30) working days written notice of such termination, and notice of termination is of the essence of the contract and the compensation paid by The School to the Teacher.
8. This Agreement may be terminated by the mutual agreement of the parties.

1-6. Whistleblower Policy

Whereas the Board of Directors of The School has determined that it would be in the best interests of the school to consider and to adopt a written policy relating to whistle blowers;

Whereas, the Board of Directors has reviewed the terms of the following policy, and following a report from counsel and discussion at a duly called meeting of the Board;

It is hereby resolved by the Board of Directors that the following policy is hereby adopted and ratified:

No employee of The School or person acting on behalf of the school in attempting to comply with any policy established by the school (including ethics, conflicts, or anti-fraud) shall:

- be dismissed or threatened to be dismissed;
- be disciplined or suspended or threatened to be disciplined or suspended;
- be penalized or any other retribution imposed, or
- be intimidated or coerced,

Based to any extent upon the fact that the employee has reported an incident or participated in an investigation in accordance with the requirements of this Policy Violation of this section of the Policy will result in disciplinary action, up to and including dismissal.

1-7. Outside Employment

An employee may hold a job with another organization as long as he or she satisfactorily performs his or her job responsibilities with The School. All employees will be judged by the same performance standards and will be subject to The School's scheduling demands, regardless of any existing outside work requirements.

If The School determines that an employee's outside work interferes with performance or the ability to meet the requirements of The School as they are modified from time to time, the employee may be asked to terminate the outside employment if he or she wishes to remain with The School.

Outside employment will present a conflict of interest if it has an adverse impact on The School. This would be unacceptable.

Outside employment is prohibited during periods of either FMLA or Extended Leaves of Absence.

1-8. Workplace Violence

The School is strongly committed to providing a safe workplace. The purpose of this policy is to minimize the risk of personal injury to employees and damage to School and personal property.

We do not expect you to become an expert in psychology or to physically subdue a threatening or violent individual. Indeed, we specifically discourage you from engaging in any physical confrontation with a violent or potentially violent individual. However, we do expect and encourage you to exercise reasonable judgment in identifying potentially dangerous situations.

Experts in the mental health profession state that prior to engaging in acts of violence, troubled individuals often exhibit one or more of the following behaviors or signs: over-resentment, anger and hostility; extreme agitation; making ominous threats such as bad things will happen to a particular person, or a catastrophic event will occur; sudden and significant decline in work performance; irresponsible, irrational, intimidating, aggressive or otherwise inappropriate behavior; reacting to questions with an antagonistic or overtly negative attitude; discussing weapons and their use, and/or brandishing weapons in the workplace; overreacting or reacting harshly to changes in School policies and procedures; personality conflicts with co-workers; obsession or preoccupation with a co-worker or Supervisor; attempts to sabotage the work or equipment of a co-worker; blaming others for mistakes and circumstances; demonstrating a propensity to behave and react irrationally

Prohibited Conduct

Threats, threatening language or any other acts of aggression or violence made toward or by any School employee WILL NOT BE TOLERATED. For purposes of this policy, a threat includes any verbal or physical harassment or abuse, any attempt at intimidating or instilling fear in others, menacing gestures, flashing of weapons, stalking or any other hostile, aggressive, injurious or destructive action undertaken for the purpose of domination or intimidation. To the extent permitted by law, employees and visitors are prohibited from carrying weapons onto School premises.

Procedures for Reporting a Threat

All potentially dangerous situations, including threats by co-workers, should be reported immediately to any member of management with whom you feel comfortable. Employees may also call the ADP MyLife Advisors at (844) 448-0325. Reports of threats may be maintained confidential to the extent maintaining confidentiality does not impede our ability to investigate and respond to the complaints. All threats will be promptly investigated. All employees must cooperate with all investigations. No employee will be subjected to retaliation, intimidation or disciplinary action as a result of reporting a threat in good faith under this policy.

If The School determines, after an appropriate good faith investigation, that someone has violated this policy, The School will take swift and appropriate corrective action.

If you are the recipient of a threat made by an outside party, please follow the steps detailed in this section. It is important for us to be aware of any potential danger in our offices. Indeed, we want to take effective measures to protect everyone from the threat of a violent act by an employee or by anyone else.

1-9. Mandated Reporter

“Mandatory reports of child abuse, abandonment or neglect”) require that **any** person who knows, or has reasonable cause to suspect, that a child is abused, abandoned, or neglected by a parent, legal custodian, caregiver or other person responsible for the child’s welfare **must report such knowledge or suspicion**.

Statutes Reporting Child Abuse

“Other person responsible for a child’s welfare” includes the child’s legal guardian or foster parent; an employee of any school, public or private child day care center, residential home, institution, facility or agency; a law enforcement officer employed in any facility, service or program for children that is operated or contracted by the Department of Juvenile Justice (DJJ); or any other person legally responsible for the child’s welfare in a residential setting; and also includes an adult sitter or relative entrusted with a child’s care.

Mandatory reports of child abuse, abandonment or neglect; mandatory reports of death; central abuse hotline.

- (a) Any person who knows, or has reasonable cause to suspect, that a child is abused, abandoned, or neglected by a parent, legal custodian, caregiver or other person responsible for the child’s welfare, as defined in this chapter, or that a child is in need of supervision and care and has no parent, legal custodian, or responsible adult relative immediately known and available to provide supervision and care shall report such knowledge or suspicion.
- (b) Any person who knows, or who has reasonable cause to suspect, that a child is abused by an adult other than a parent, legal custodian, caregiver or other person responsible for the child’s welfare, shall report such knowledge or suspicion.
- (c) Any person who knows, or has reasonable cause to suspect, that a child is the victim of childhood sexual abuse or the victim of a known or suspected juvenile sexual offender,

1-10. Firearms in the Workplace

The Board prohibits employees from possessing, storing, making, or using a weapon, including a concealed weapon, in a school safety zone and any setting that is under the control and supervision of the Board for the purpose of school activities approved and authorized by the Board including, but not limited to, property leased, owned or contracted by the Board for a school-sponsored event.

Weapons and firearms are defined in F.S. 790.001 and include, but are not limited to, firearms, guns of any type, knives, razors, clubs, electric weapons, metallic knuckles, martial arts weapons, ammunition, and explosives.

For purposes of this policy, the term "weapon" also means any object which, in the manner in which it is used, is intended to be used, or is represented, as capable of inflicting serious bodily harm or property damage, as well as endangering the health and safety of persons.

Staff members shall report knowledge of dangerous weapons and/or threats of violence by students, staff members, or visitors to the principal or site manager. Failure to report such knowledge may subject the staff member to discipline.

The school principal shall ensure that any staff member possessing a weapon or other device designed to inflict serious bodily harm, including a concealed weapon, is reported immediately to the appropriate law enforcement agency, regardless of whether such staff member possesses a valid concealed weapon license. As well, the staff member shall be subject to disciplinary action, up to and including termination, consistent with law, due process, and the terms of any negotiated agreement.

An exception to this policy includes weapons possessed as authorized by statute.

The Board directs the school to post notices prohibiting the carrying and possession of concealed weapons in a school safety zone, including schools and school buildings, on school premises and school buses, and at school activities.

Section 2 - Operational Policies

2-1. Employment Categories

It is the intent of The School to clarify the definitions of employment classifications so that employees understand their employment status and benefit eligibility. These classifications do not guarantee employment for any specified period of time. Accordingly, the right to terminate the employment relationship at will at any time is retained by both the employee and employers.

Each employee is designated as either NONEXEMPT or EXEMPT from federal and state wage and hour laws. NONEXEMPT employees are entitled to overtime pay under the specific provisions of federal and state laws. EXEMPT employees are excluded from specific provisions of federal and state wage and hour laws. An employee's EXEMPT or NONEXEMPT classification may be changed only upon written notification by The School or ADP TotalSource.

In addition to the above categories, each employee will belong to one other employment category:

REGULAR FULL-TIME employees are those who are not in a temporary or introductory status and who are regularly scheduled to work 30 or more hours per week. Generally, they are eligible for ADP TotalSource's/The School's benefit package, subject to the terms, conditions, and limitations of each benefit program.

PART-TIME employees are those who are not assigned to a temporary or introductory status and who are regularly scheduled to work less than 30 hours per week. While they do receive all legally mandated benefits (such as Social Security and workers' compensation insurance), they are ineligible for all of ADP TotalSource's other benefit programs.

INTRODUCTORY employees are those whose performance is being evaluated to determine whether further employment in a specific position or with The School is appropriate. Employees who satisfactorily complete the introductory period will be notified of their new employment classification.

TEMPORARY/3100's employees are those who are hired as interim replacements, to temporarily supplement the work force, or to assist in the completion of a specific project. Employment assignments in this category are of a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status. Temporary employees retain that status unless and until notified of a change. While temporary employees receive all legally mandated benefits (such as workers' compensation insurance and Social Security), they are eligible for all of ADP TotalSource's other benefit programs so long as they are regular full-time status.

2-2. Part-Time Substitute Teachers

Part-Time Substitute Teachers are temporary staff called in to assist the school on an as-needed basis when a teacher is out. Employment assignments in this category are considered temporary, and on an as-needed basis. Employment beyond any initially stated period does not in any way imply a change in employment status. Part-Time Substitute employees receive all legally mandated benefits (such as workers' compensation insurance and Social Security), however are ineligible for all other benefit programs. Should the school call a substitute for an assignment and the substitute is not available on multiple occasions, the school may remove the substitute from their list of substitutes.

2-3. Anniversary Date

The first day of work at your school location will be your anniversary date and will be used to determine your length of service to your school. This date will govern your eligibility to receive particular benefits.

2-4. Introductory Period/ 90 Day Evaluation period

The introductory period (90-Day Evaluation Period) is intended to give new employees the opportunity to demonstrate their ability to achieve a satisfactory level of performance and to determine whether the new position meets their expectations. The School uses this period to evaluate employee capabilities, skills, productivity, classroom management skills, work habits, and overall performance. At the end of the 90-day probationary period, the Principal will give a recommendation to the Board of Directors of The School. A determination will then be made regarding continued employment. Either the employee or employers may end the employment relationship at will at any time during or after the introductory period, with or without cause or advance notice.

All new and rehired employees work on an introductory basis for the first 90 calendar days after their date of hire. Employees who are promoted or transferred within Academica managed schools must complete a secondary introductory period of the same length with each reassignment to a new position. Any significant absence will automatically extend an introductory period by the length of the absence. If The School determines that the designated introductory period does not allow sufficient time to thoroughly evaluate the employee's performance, the introductory period may be extended for a specified period.

In cases of promotions or transfers within The School, an employee who, in the sole judgment of management, is not successful in the new position can be removed from that position at any time during the secondary introductory period. If this occurs, the employee may be allowed to return to his or her former job or to a comparable job for which the employee is qualified, depending on the availability of such positions and The School's needs.

Upon satisfactory completion of the initial introductory period, employees enter the "regular" employment classification.

During the initial introductory period, new employees are eligible for those benefits that are required by law, such as workers' compensation insurance and Social Security. After becoming regular employees, they may also be eligible for other ADP TotalSource-provided benefits, subject to the terms and conditions of each benefits program. Employees should read the information for each specific benefits program for the details on eligibility requirements.

Benefits eligibility and employment status are not changed during the secondary introductory period that results from a promotion or transfer.

Completion of the probationary period does not alter an employee's at-will status.

2-5. New Hires/Special Skills Licensing and Certification

In addition to producing eligibility by the execution and production of documents stated in the I-9, applicants will be required to:

- Present a teaching certificate.
- Present proof of educational certificates and/or statement of eligibility
- Present prior teaching experience verification forms within first 60 days of the "start date".
- Present original transcripts for all degrees conferred
- Present proof of immunizations (per County requirements)
- Present proof of TB test (per County requirements)
- Submit for fingerprinting, background checks and drug testing to the county schoolboard office, in addition to ADP TotalSource, at the employee's expense (per County requirements)
- Meet eligibility hiring standards for the county school board in which he/she works/will work

All teacher positions require that you maintain specific certifications as a condition of your employment. It is the teacher's responsibility to attend, at teacher's expense, all necessary classes and/or workshops to maintain teacher's teaching credentials. The principal will inform teachers of upcoming workshops that can be attended, as a courtesy to the teacher.

Teachers must agree to comply with all certification requirements, as set forth by The School and Iowa Statutes. Any teacher who has been granted a waiver agrees to complete any and all credits required for certification in the subject area within the time frame specified by the Principal. The teacher further agrees to provide The School, in a timely manner, with written verification of her/his compliance with said requirements. Teachers are to provide evidence that he/she met the eligibility requirements for the renewal of his/her Iowa Educator's Certificate by June 30th of the year his/her current certificate ends in order to be eligible to be considered to return to a certified position.

2-6. Your Employment Records

In order to obtain your position, you provided us with personal information, such as your address, e-mail address and telephone number. This information is contained in your personnel file.

Please keep your personnel file up to date by informing the HR Department of any changes. Also, please inform the HR Department of any specialized training or skills you may acquire in the future, as well as any changes to any required visas. Unreported changes of address, e-mail, marital status, etc. can affect your withholding tax, the processing of important documents such as the W-2 at the end of the year, and benefit coverage. Further, an "out of date" emergency contact or an inability to reach you in a crisis could cause a severe health or safety risk or other significant problem.

2-7. Working Hours and Schedule

The School normally is open for business Monday through Friday. You will be assigned a work schedule and you will be expected to begin and end work according to the schedule. To accommodate the needs of our business, at some point we may need to change individual work schedules on either a short-term or long-term basis.

Employees will be provided meal and rest periods as required by law. Your Supervisor will provide further details.

2-8. Timekeeping Procedures

Employees must record their actual time worked for payroll and benefit purposes. Non-exempt employees must record the time work begins and ends, as well as the beginning and ending time of any departure from work for any non-work-related reason, on forms as prescribed by management.

Some schools may require Exempt employees to record their start and end times for security purposes. Please refer to the School's Operational Manual or School Principal for further information.

Altering, falsifying or tampering with time records is prohibited and subjects the employee to discipline, up to and including discharge.

Exempt employees are required to record their daily work attendance and report full days of absence from work for reasons such as leaves of absence, sick leave or personal business.

Non-exempt employees may not start work until their scheduled starting time.

It is your responsibility to sign your time record to certify the accuracy of all time recorded. Any errors in your time record should be reported immediately to your Supervisor, who will attempt to correct legitimate errors.

Any employee with a need to exit the building during school hours must notify and request approval from the Administration prior to exiting. Once approval is received, the employee must sign out on the designated form.

2-9. Overtime

Like most successful companies, we experience periods of extremely high activity. During these busy periods, additional work is required from all of us. Your Supervisor is responsible for monitoring business activity and requesting overtime work if it is necessary. Effort will be made to provide you with adequate advance notice in such situations.

Any non-exempt employee who works overtime will be compensated at the rate of one and one-half times (1.5) his/her normal hourly wage for all time worked in excess of forty (40) hours each week, unless otherwise required by law.

Employees may work overtime only with prior authorization from their direct supervisor and/or The School's Principal. Employees, who fail to obtain prior authorization, may be subject to disciplinary action, up to and including discharge.

2-10. Travel Time for Non-Exempt Employees

Overnight, Out-of-Town Trips

Non-exempt employees will be compensated for time spent traveling (except for meal periods) during their normal working hours, on days they are scheduled to work and on unscheduled work days (such as weekends). Non-exempt employees also will be paid for any time spent performing job duties during otherwise non-compensable travel time; however, such work should be limited absent advance management authorization.

Out-of-Town Trips for One Day

Non-exempt employees who travel out of town for a one-day assignment will be paid for all travel time, except for, among other things: (i) time spent traveling between the employee's home and the local railroad, bus or plane terminal; and (ii) meal periods.

Local Travel

Non-exempt employees will be compensated for time spent traveling from one job site to another job site during a workday. The trip home, however, is non-compensable when an employee goes directly home from his/her final job site, unless it is much longer than his/her regular commute home from the regular worksite. In such case, the portion of the trip home in excess of the regular commute is compensable.

Commuting Time

Under the Portal to Portal Act, travel from home to work and from work to home is generally non-compensable. However, if a non-exempt employee regularly reports to a worksite near his/her home, but is required to report to a worksite farther away than the regular worksite, the additional time spent traveling is compensable.

If compensable travel time results in more than 40 hours worked by a non-exempt employee, the employee will be compensated at an overtime rate of one and one-half times the regular rate.

To the extent that applicable state law provides greater benefits, state law applies.

2-11. Safe Harbor Policy for Exempt Employees

It is our policy and practice to accurately compensate employees and to do so in compliance with all applicable state and federal laws. To ensure that you are paid properly and that no improper deductions are made, you must review your pay stubs promptly to identify and report all errors.

If you are classified as an exempt salaried employee, you will receive a salary which is intended to compensate you for all hours you may work for The School. This salary will be established at the time of hire or when you become classified as an exempt employee. While it may be subject to review and modification from time to time, such as during salary review times, the salary will be a predetermined amount that will not be subject to deductions for variations in the quantity or quality of the work you perform.

Under federal and state law, your salary is subject to certain deductions. For example, unless state law requires otherwise, your salary can be reduced for the following reasons:

- Full-day absences for personal reasons.
- Full-day absences for sickness or disability.

Full-day disciplinary suspensions for infractions of our written policies and procedures.
Family and Medical Leave absences (either full- or partial-day absences).

To offset amounts received as payment from the court for jury and witness fees or from the military as military pay.

The first or last week of employment in the event you work less than a full week.

Any full work week in which you do not perform any work.

Your salary may also be reduced for certain types of deductions such as your portion of health, dental or life insurance premiums; state, federal or local taxes; social security; or voluntary contributions to a 401(k) or pension plan.

In any work week in which you performed any work, your salary will not be reduced for any of the following reasons:

Partial day absences for personal reasons, sickness or disability.

Your absence on a day because your employer has decided to close a facility on a scheduled work day.

Absences for jury duty, attendance as a witness, or military leave in any week in which you have performed any work (subject to any offsets as set forth above).

Any other deductions prohibited by state or federal law.

However, unless state law provides otherwise, deductions may be made to your accrued leave for full- or partial-day absences for personal reasons, sickness or disability.

If you believe you have been subject to any improper deductions, you should immediately report the matter to your supervisor. If the supervisor is unavailable or if you believe it would be inappropriate to contact that person (or if you have not received a prompt and fully acceptable reply), you should immediately contact the Manager of Human Resources or any other supervisor in The School with whom you feel comfortable.

2-12. Your Paycheck

Salaried staff are paid semi-monthly on the 15th and the last day of the month. Hourly staff employees are paid biweekly on every other Friday. Your paycheck will include all the time you have worked during the past pay period. If “pay day” falls on a weekend or holiday, employees will be paid the Friday prior to the scheduled pay date.

Your payroll stub itemizes deductions made from your gross earnings. By law, The School is required to make deductions for Social Security, federal income tax and any other appropriate taxes. These required deductions also may include any court-ordered garnishments. Your payroll stub will also differentiate between regular pay received and overtime pay received.

If you believe there is an error in your pay, bring the matter to the attention of Payroll department immediately so The School can resolve the matter quickly and amicably.

Your paycheck will be given only to you, unless you request that it be mailed, or authorize in writing another person to accept your check for you.

2-13. Compensation

The School's Salary Schedule has been established as the guide for determining salaries. Although it is The School's intent to offer salaries comparable to that offered by the public school system where The School is located, please be reminded that The School is a Public Charter School and not a traditional Public School. Thus, the salary schedule used may not be a "replica" of the one used by the County. Because The School's budget is established at the onset of the year, The School will not make changes to salaries during the fiscal year (Masters, Specialist and Doctorate degrees conferred within the year are the exception to the policy), unless the Board of Directors approves such changes.

Teachers that will be working the entire School Year (10 months) will have their salary paid throughout 12 months, including the summer months. There are teachers who will work less than the 10 months of The School Year, i.e. maternity leave, hired after the first day of School, etc. These teachers will be paid a prorated salary from the date they begin working through the last day worked.

Annual pay increases based on exceptional performance and merit may be determined on a case-by-case basis, as evaluated by The School's Board of Directors. The School is not obligated to provide increases based on the increases issued by The School district in which The School is located.

The School's EESAC/SAC Committee currently has the discretion to approve how the Iowa School Recognition Funds are dispersed. The current policy which has been adopted states that, in the event that the EESAC awards a monetary bonus to employees, the employee must (1) be employed at The School at the time The School received the grade and (2) be employed by an Academica managed school at the time the funds are dispersed.

If an employee resigns or is terminated prior to The School dispersing the funds, the employee forfeits the monetary bonus. The EESAC/SAC Committee reserves the right to pro-rate the funds in the event that the employee is not employed for the entire school year. The School's Advisory Council (SAC)/EESAC or Board of Directors has the discretion to approve how the funds are dispersed. The requirements for receipt remain the same.

Any teacher who applies and receives National Board Certification will be eligible to receive the \$7,500 bonus payable over 3 years. If the teacher leaves prior to the end of their 3rd year the entire bonus amount will be forfeited. Any amount paid to the teacher will be subject to repayment.

For terminations that occur at the end of the school year, teachers will have the remainder of their salary paid on the last pay period of the school year.

Underpayment/Overpayment

It is the school's practice to ensure all employees receive compensation for work performed. It is the employee's responsibility to verify the accuracy of their compensation and to notify Human Resources immediately if his/her salary is incorrect.

Since funds are budgeted on an annual basis, it is imperative that issues be identified promptly so a resolution can be reached during the same fiscal year. If the school discovers that an employee

is not receiving the correct salary, the school will make the necessary adjustments to ensure that the employee is paid correctly **within the fiscal year**. If the school discovers that an employee is being overpaid, arrangements will be made with the employee to ensure repayment is made immediately.

The school is authorized to make corrections for overpayments by adjusting an employee's salary to account for the overpayments.

2-14. Direct Deposit

The School strongly encourages employees to use direct deposit. Online authorization forms are available on the MyTotalSource website.

If you do not elect "direct deposit", your check will remain at the school during the summer months and holidays, until the school reopens.

2-15. Salary Advances

The School does not permit advances on paychecks or against accrued paid time off.

2-16. Performance Reviews

Supervisors and employees are strongly encouraged to discuss job performance and goals on an informal, day-to-day basis. Formal performance evaluations are conducted at the end of an employee's initial period in any new position. This period, known as the introductory period, allows the supervisor and the employee to discuss the job responsibilities, standards, and performance requirements of the new position. Additional formal performance evaluations are conducted to provide both supervisors and employees the opportunity to discuss job tasks, identify and correct weaknesses, encourage and recognize strengths, and discuss positive, purposeful approaches for meeting goals. The purpose of these reviews is to ensure that your skills as an educator are being effectively delivered to the students you teach.

Official evaluations will be conducted two (2) times during The School year. The evaluation and performance review form varies by grade level. These reviews are an evaluation tool for both you as an educator, and the principal as an administrator and director of your educator skills and talents. Satisfactory performance reviews do not necessarily result in merit increases, but they assist in annual evaluations and pay increases.

In the event that you are unsatisfied with a performance review, please complete the appropriate section of the review to note your dispute. Further, if you feel that your administrator is not objectively reviewing your skills as an educator, you may file a grievance by contacting the Human Resource Manager within five (5) school days of the disputed review.

2-17. Record Retention

The School acknowledges its responsibility to preserve information relating to litigation, audits and investigations. Failure on the part of employees to follow this policy can result in possible civil and criminal sanctions against The School and its employees and possible disciplinary action against responsible individuals (up to and including termination of employment). Each employee has an obligation to contact the Human Resources to inform them of a potential or actual litigation, external audit, investigation or similar proceeding involving The School that may have an impact on record retention protocols.

Section 3 - Benefits

3-1. Benefits Overview

In addition to good working conditions and competitive pay, it is The Charter School's policy to provide a combination of supplemental benefits to all eligible employees. In keeping with this goal, each benefit program has been carefully devised. These benefits include time- off benefits, such as personal time and holidays, and insurance and other plan benefits. We are constantly studying and evaluating our benefits programs and policies to better meet your present and future requirements. These policies have been developed over the years and continue to be refined to keep up with changing times and needs.

The next few pages contain a brief outline of the benefits programs The School provides for you and your family. Of course, the information presented here is intended to serve only as guidelines.

The descriptions of the insurance and other plan benefits merely highlight certain aspects of the applicable plans for your general information only. The details of those plans are spelled out in the official plan documents, which are available for review upon your request from the Human Resources Department. Additionally, the provisions of the plans, including eligibility and benefits provisions, are summarized in the summary plan descriptions ("SPDs") for the plans (which may be revised from time to time). In the determination of benefits and all other matters under each plan, the terms of the official plan documents shall govern over the language of any descriptions of the plans, including the SPDs and this handbook.

Further, the school (including the officers and administrators who are responsible for administering the plans) retains full discretionary authority to interpret the terms of the plans, as well as full discretionary authority with regard to administrative matters arising in connection with the plans and all issues concerning benefit terms, eligibility and entitlement.

While The School intends to maintain these employee benefits, it reserves the absolute right to modify, amend or terminate these benefits at any time and for any reason.

If you have any questions regarding your benefits, please contact the Human Resources Department.

3-2. Holidays

The School will grant holiday time off to all active employees on the holidays listed below:

- Martin Luther King, Jr. Day (third Monday in January)
- Memorial Day (last Monday in May)
- Thanksgiving (fourth Thursday in November)
- Day after Thanksgiving

The School will grant paid holiday time off to all eligible employees immediately upon assignment to an eligible employment classification. Holiday pay will be calculated based on the employee's straight-time pay rate (as of the date of the holiday) times the number of hours the employee would otherwise have worked on that day.

If a recognized holiday falls during an eligible employee's paid absence (such as vacation or sick leave), holiday pay will be provided instead of the paid time off benefit that would otherwise have applied.

If eligible nonexempt employees work on a recognized holiday, they will receive holiday pay plus wages at their straight-time rate for the hours worked on the holiday.

Paid time off for holidays will not be counted as hours worked for the purposes of determining overtime.

3-3. Personal Time Off

Personal days are offered for employees to use for of personal time off, for illness or injury, or that of a family member. Salaried employees are eligible to receive and use personal time off as described in this policy. They can request use of this benefit after it is earned.

The amount of days employees receive each year is as shown in the following schedule:

- Salaried employees are entitled to 1 day per month up to 12 days of active work during the 12 month period.

The length of eligible service is calculated on the basis of a "benefit year." This is the 10, 11 or 12 month period that begins when the employee starts to earn leave. An employee's benefit year may be extended for any significant leave of absence except military leave of absence. Military leave has no effect on this calculation. (See individual leave of absence policies for more information.)

Personal time off can be used in minimum increments of one hour. Salaried employees who have an unexpected need to be absent from work should notify their direct supervisor and/or School Principal before the scheduled start of their workday, if possible. The direct supervisor and/or School Principal must also be contacted on each additional day of unexpected absence.

To schedule a planned day off (i.e. Physician's appointments, etc.), salaried employees should request advance approval from their supervisors/Principal. Requests will be reviewed based on a number of factors, including business needs and staffing requirements. Due to the potential for disruption, the Principal has the right to refuse to allow a teacher or employee a scheduled day where it would result in the absence of 2 or more teachers on the same day. The School Principal may also assign blackout periods where personal time off will not be permitted. Please refer to The School's operational handbook for further information.

This time is paid at the salaried employee's base pay rate at the time of absence. It does not include overtime or any special forms of compensation such as incentives, commissions, bonuses, or shift differentials.

In the event that available time is not used by the end of the benefit year, teachers will be able to "rollover" all unused days. Teachers also have the opportunity to "cash out" unused personal days, however, there must be a balance of 21 days remaining in the personal bank. The maximum amount of days that may be cashed out in any given year is 10 days. If more than 3 personal days were taken in any given year, there is no cash out option for that School year. In addition, the cash out percentage for unused personal days is 80%. Accruals will begin again in the next benefit year.

Upon termination of employment, salaried employees will not be paid for unused personal time. Cash out days will be paid out as a supplement with the employee's first check of the next school year, as the employee must return in order to be eligible to cash out.

Non-Exempt Salaried employees will receive 1 day per month up to 12 days of active work during the 12 month school year period. Non-Exempt Salaried employees will have the option to "rollover" unused personal days. The maximum number of personal days permitted will be 20. If you have reached the 20 day cap, accruals will cease. There is no "cash out" opportunity available for non-exempt salaried employees.

Office Salaried employees will receive 1 day per month up to 12 days of active work during the 12 month school year period. Office Salaried employees will have the option to "rollover" unused personal days. The maximum number of personal days permitted will be 10. If you have reached the 10 day cap, accruals will cease. There is no "cash out" opportunity available for office salaried employees.

Please note the cash out and a rollover aspect of this policy only applies to teachers and instructional employees.

This policy is subject to change at the discretion of The School's Board of Director.

3-4. Lactation Breaks

The School will provide a reasonable amount of break time to accommodate an employee desiring to express breast milk for the employee's infant child, in accordance with and to the extent required by applicable law. The break time, if possible, must run concurrently with rest and meal periods already provided to the employee. If the break time cannot run concurrently with rest and meal periods already provided to the employee, the break time will be unpaid, subject to applicable law.

The School will make reasonable efforts to provide employees with the use of a room or location other than a toilet stall for the employee to express milk in private. This location may be the employee's private office, if applicable. The School may not be able to provide additional break time if doing so would seriously disrupt The School's operations, subject to applicable law. Please consult the Human Resources Department if you have questions regarding this policy.

Please advise management if you need break time and an area for this purpose. Employees will not be discriminated against or retaliated against for exercising their rights under this policy.

3-5 Health Insurance

ADP TotalSource's health insurance plans (HMO and POS options are available, depending on School location) provide employees and their dependents access to medical, dental, and vision care insurance benefits. Employees in the following employment classifications are eligible to participate in the health insurance plan:

- Regular full-time employees
- Regular part-time employees working an average of 30 hours per week in a given year

Eligible employees may participate in the health insurance plan subject to all terms and conditions of the agreement between ADP TotalSource and the insurance carrier.

A change in employment classification that would result in loss of eligibility to participate in the health insurance plan may qualify an employee for benefits continuation under the Consolidated Omnibus Budget Reconciliation Act (COBRA). Individuals who are not returning for the following school year (regardless of whether it was the employee's decision to resign or whether The School did not extend an invitation to return) will have their active benefits terminated on June 30th. Refer to the Benefits Continuation (COBRA) policy for more information.

Details of the health insurance plan are described in the Summary Plan Description (SPD). An SPD and information on cost of coverage will be provided in advance of enrollment to eligible employees. Contact the ADP TotalSource (1-800-554-1802) for more information about health insurance benefits.

3-6. Workers' Compensation

On-the-job injuries are covered by our Workers' Compensation Insurance Policy, which is provided at no cost to you. If you are injured on the job, no matter how slightly, report the incident immediately to your Supervisor. Failure to follow School procedures may affect your ability to receive Workers Compensation benefits.

This is solely a monetary benefit and not a leave of absence entitlement. Employees who need to miss work due to a workplace injury must also request a formal leave of absence. See the Leave of Absence sections of this handbook for more information.

3-7. Jury Duty Leave

The School encourages employees to fulfill their civic responsibilities by serving jury duty when required. Employees who have completed a minimum of 90 calendar days of service in an eligible classification may request paid jury duty leave. This will be paid according to County Ordinance.

Jury duty pay will be calculated on the employee's base pay rate times the number of hours the employee would otherwise have worked on the day of absence. Employee classifications that qualify for paid jury duty leave are:

- Regular full-time employees
- Regular part-time employees

If employees are required to serve jury duty beyond the period of paid jury duty leave, they may use any available paid time off (for example, vacation benefits) or may request an unpaid jury duty leave of absence.

Employees must show the jury duty summons to their supervisor as soon as possible so that the supervisor may make arrangements to accommodate their absence. Of course, employees are expected to report for work whenever the court schedule permits.

Either The School or the employee may request an excuse from jury duty if, in The School's judgment, the employee's absence would create serious operational difficulties.

The School will continue to provide health insurance benefits until the end of the month in which the unpaid jury duty leave begins. At that time, employees will become responsible for the full costs of these benefits if they wish coverage to continue. When the employee returns from jury duty, benefits will again be provided by The School according to the applicable plans.

Benefit accruals such as vacation, sick leave, or holiday benefits will be suspended during unpaid jury duty leave and will resume upon return to active employment.

NOTE: When an employee is involved in his/her own litigation or is subpoenaed for a case not relating to an issue involving employee's employment with School and must appear in court, the time must be reported as personal.

3-8. Bereavement Leave

All full time employees who wish to take time off due to the death of an immediate family member should notify their supervisor immediately.

Up to 2 days of paid bereavement leave will be provided to full time employees.

Bereavement pay is calculated based on the base pay rate at the time of absence and will not include any special forms of compensation, such as incentives, commissions, bonuses, or shift differentials.

Bereavement leave will normally be granted unless there are unusual business needs or staffing requirements. Employees may, with their supervisors' approval, use any available paid leave for additional time off as necessary.

The School defines "immediate family" as the employee's spouse, domestic partner, parent, child, sibling; the employee's spouse's parent, child, or sibling; the employee's child's spouse; grandparents or grandchildren.

3-9. Voting Leave

In the event an employee does not have sufficient time outside of working hours to vote in a statewide election, if required by state law, the employee may take off enough working time to vote. Such time will be paid if required by state law. This time should be taken at the beginning or end of the regular work schedule. Where possible, your Supervisor should be notified at least two days prior to the voting day.

3-10. Long-Term Disability

Full-time employees are eligible to participate in the Long-Term Disability plan, subject to all terms and conditions of the agreement between The School and the insurance carrier.

This is solely a monetary benefit and not a leave of absence. Employees who will be out of work must also request a formal leave of absence. See the Leave of Absence sections of this handbook for more information.

3-11. Employee Assistance Program

The School provides an employee assistance program for employees. This program offers qualified counselors to help you cope with personal problems you may be facing. Further details can be obtained by contacting an EAP counselor at (866) 574-7256.

3-12 Educational Assistance

The School recognizes that the skills and knowledge of its employees are critical to the success of the institution. The educational assistance program encourages personal development through formal education so that employees can maintain and improve job-related skills or enhance their ability to compete for reasonably attainable jobs within the School.

The following criteria will be used for Tuition Reimbursement for Full-time Certified Teacher:

1. All full-time certified teachers shall be eligible to receive tuition reimbursement for up to **twelve (12) graduate semester hours, per contract year**, from an accredited institution of higher learning at a rate not to exceed **\$175.00 per semester hour**, up to a total of 48 graduate semester hours leading to an advanced degree in subject field.
2. The period in which the twelve hours may be taken extends from the fall term to the succeeding fall term for the particular institution the employee is attending. Tuition reimbursement shall be limited to:
 - a. Graduate level courses leading to a Master's Degree, Specialist Degree, or Doctorate Degree in the teacher's subject area.
 - b. Undergraduate and/or graduate level courses leading to state certification in a subject area designated as critical staff shortage area.
 - c. Principal approval based on school needs.
 - d. Graduate level courses leading to state certification in Educational Leadership are subject to additional requirements and approvals. Tuition reimbursement for up to **twelve (12) graduate semester hours, per contract year**, from an accredited institution of higher learning at a rate not to exceed **\$200.00 per semester hour**, up to a total of 72 graduate semester hours.
 - i. Employee's wishing to submit Educational Leadership courses for reimbursement must apply prior to beginning the program.
 - ii. The application process begins with the Principal at the School.
 - iii. Approval for reimbursement will be based on school needs
 - iv. Deadline to turn in application – May 1st for the coming Fall semester and September 1st for the coming Spring semester.

- v. A minimum of 3 years teaching experience is required. In addition, one (1) year must have been at a Charter School that has the same Educational Service Provider.
 - vi. All evaluations must be excellent.
 - vii. Must have a Master's degree. If you are a teacher in a Middle/High School, you must have a Master's in field prior to applying for Leadership reimbursement.
 - viii. Applicant must take Principal Insight Assessment.
 - ix. Approval will be decided by an appointed Interview Committee.
3. Teachers receiving reimbursement must have obtained a "B" average or better in the course(s) for which reimbursement is expected.
4. In order to receive reimbursement, receipt(s) for paid tuition and official transcript(s) shall be submitted to the Human Resources Department upon completion of the course(s), along with the completed tuition reimbursement request form.

Request for reimbursement must be submitted within 90 days of completion of the course. Applicant must provide the tuition reimbursement request form, transcripts and a copy of the paid receipt. Please note, you will not be reimbursed for parking decals, etc.

3-13. Degree Entitlements

The School awards Entitlements for the following conferred degrees:

Master's

Specialist

Doctorate

Entitlements for Advanced Degree in Educational Leadership will only be granted to Lead Teachers who also hold a certification in Educational Leadership.

Iowa Certification Coverage

Agriculture
Arabic
Art

Biology

Business Education
Chemistry

Chinese
Computer Science

Dance
Drama

Earth-Space Science

Educational Leadership

Educational Media Specialist

Elementary Education (K-6)

English

English to Speakers of Other Languages (ESOL)
Exceptional Student Education (ESE)

Family and Consumer Science

Farsi
French
German
Greek
Guidance and Counseling

Haitian-Creole
Health

Hearing Impaired

Frequently Acceptable Degree Major(s)

Agriculture, General Agriculture, Vocational Agriculture
Arabic
Art, Art Education, Fine Arts (major, not degree type),
Architecture, Interior Design, Commercial Art, One Area of
Art (Painting, Sculpture, etc.)
Bacteriology, Biology, Biological Sciences, Biomechanics,
Botany, Dentistry, Doctor of Medicine, Exercise Physiology,
Genetics, Kinesiology, Life Science, Marine Biology,
Physiology, Zoology
Business Education, Business Administration
Biochemistry, Chemistry, Chemical Engineering, Pharmacy,
Pharmaceutical Sciences, Doctor of Pharmacy
Chinese
Computer Information Sciences, Computer Science,
Computer Programming, Computer Technology, Computer
Engineering
Dance, Dance Education
Acting, Drama, Dramatic Arts, Theatre, Theatre Arts, One
Area of Drama (Directing, etc.)
Astronomy, Climatology, Earth Science, Geology,
Metallurgy, Meteorology, Oceanography, Paleontology,
Physical Geography, Space Science
Educational Administration, Administration and Supervision,
Educational Leadership, Educational Management and
Development, School Principal (master's level)
Educational Media, Educational Media Technology,
Instructional Media, Library Science (not Technology
Education)
Elementary Education 1-6, K-6, N/K-6, K-3, K-4, K-8, K-9,
Upper Elementary 4-6
English, Literature (English), Creative Writing, Language
Arts
English to Speakers of Other Languages (ESOL)
Special Education, Mild and Moderate Needs, Teacher of
the Handicapped, Varying Exceptionalities; Behavioral
Disorders, BD/LD, Emotionally Conflicted, Emotionally
Disturbed, Emotionally Handicapped, Socially and
Emotionally Maladjusted; Educable Mentally Retarded,
Children with Retarded Mental Development (CRMD),
Intellectual Disabilities, Mentally Handicapped, Mentally
Impaired, Mental Retardation, Profoundly Mentally Retarded,
Severely and Profoundly Mentally Retarded, Trainable
Mentally Retarded; Learning Disabilities, Specific Learning
Disabilities; Motor Disabilities, Orthopedically Handicapped,
Physically Handicapped, Physically Impaired
Home Economics, Vocational Home Economics, Family and
Consumer Science
Farsi
French
German
Greek
School Guidance and Counseling, School Counseling,
School Guidance (master's degree level)
Haitian-Creole
Allied Health, Health, Health Education, Health Services,
Nursing (BS), Public Health, Doctor of Medicine
Deaf and Hard of Hearing, Deaf Education, Hearing
Disabilities, Hearing Impaired, Hearing Science, Education
of Deaf-Blind

Hebrew	Hebrew
Hindi	Hindi
Humanities	Humanities, Classical Studies
Italian	Italian
Japanese	Japanese
Journalism	Journalism, Broadcast Journalism, Television Journalism
Latin	Latin
Marketing	Distributive Education, Marketing, Marketing Education
Mathematics	Mathematics, Mathematics Education, Engineering (Civil, Chemical, Computer, Electrical, Mechanical, Aeronautical/Aerospace, or Nuclear), Statistics
Middle Grades English	Middle Grades English, Middle Grades Language Arts, Middle School English Education, Junior High School English, English, Literature (English), Creative Writing, Language Arts Literature (English), Creative Writing
Middle Grades General Science	Middle Grades Science, Teaching Middle School Science, Junior High Science, Middle School Science Education, General Science
Middle Grades Mathematics	Middle Grades Mathematics, Teaching Middle School Mathematics, Junior High Mathematics, Middle School Mathematics Education, Mathematics, Statistics, Engineering (Civil, Chemical, Computer, Electrical, Mechanical, Aeronautical/Aerospace, or Nuclear)
Middle Grades Social Science	Middle Grades Social Science, Teaching Middle School Social Science, Junior High Social Science, Middle School Social Science Education, Social Science, Social Studies, American History, History, Western Civilization, World History, Geography, Economic Geography, (and other specialized areas of geography) Economics, Civics, Government, International Relations, Political Science, Sociology, Psychology, Educational Psychology (and other specialized areas of Psychology)
Music	Applied Music, Instrumental Music, Music, Music Education, Piano or other major instrument, Vocal Music, Voice, Composition (music), Percussion
Physical Education (K-12)	Physical Education any grade level with student teaching
Physics	Aeronautical Engineering, Aerospace Engineering, Chemical Engineering, Civil Engineering, Electrical Engineering, Mechanical Engineering, Nuclear Physics, Physics, Thermodynamics, Nuclear Engineering
Portuguese	Portuguese
Preschool Education	Nursery School Education, Preschool Education, Birth-Age 4, Birth-Age 8
Prekindergarten/Primary Education	Early Childhood Education if NK-3, NK-4, or Birth-Age 8; P-5, N-6, NK-6, Prekindergarten/Primary Education
Reading	Reading (masters degree level)
Russian	Russian
School Psychologist	School Psychology (specialist's degree level)
School Social Worker	Social Work, Social Worker, Social Welfare
Social Science	Social Science, Social Studies, American History, History, Western Civilization, World History, Geography, Economic Geography (and other specialized areas of geography), Economics, Civics, Government, International Relations, Political Science, Sociology, Psychology, Educational Psychology (and other specialized areas of Psychology)
Spanish	Spanish
Speech	Speech, Speech Communication, Public Speaking
Speech-Language Impaired	Communication Disorders, Speech Correction, Speech and Hearing Science, Speech-Language Impaired, Speech Pathology, Speech Pathology and Audiology (master's degree level)

Technology Education

Industrial Arts, Industrial Technology Education, Industrial Education, Industrial Arts-Technology Education, Technology Education
Turkish
Blind and Partially Sighted, Visual Disabilities, Visually Handicapped, Visually Impaired

Turkish
Visually Impaired

How to Receive Payment for an Advanced Degree

Complete the [Request for Payment of an Advanced Degree for Teachers form \(see your school's assigned Payroll contact\)](#), attach the official transcript showing "DEGREE CONFERRED" or a Credential Evaluation Report if a foreign degree, and send to the Academics Human Resources Department (hrsupport@academica.org).

Your eligibility for an advanced degree payment cannot be evaluated until an **official transcript** or an **original foreign credential evaluation** reflecting the degree conferral is received.

Note: The form must be submitted electronically to HRSupport@academica.org.

Per FL Statute 1012.22(1) (c) (3), payment for advanced degrees will only be provided if the degree is held in the area of certification shown on the Iowa certificate. Therefore, general graduate degrees such as Curriculum and Instruction or Education, which do not match any of the Department of Education certification subjects, would not be acceptable unless the transcript identifies a major or specialization in your certificate subject (e.g., Mathematics, English, Elementary Education, etc.). To determine if your degree matches the certification held on your FL Department of Education teaching certificate, please view a listing of the [Certification Acceptable Majors](#) below.

3-14. Retirement Savings Plan

The School has established a Retirement Plan to provide employees the potential for future financial security for retirement. Employees are eligible for this benefit on the 1st of the month after completion of 90 days of service. Enrollment documents are mailed directly to the address on file with ADP TotalSource. If you don't receive your documents, please contact 1-855-646-7549, Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time (ET) or visit the website at <http://adptotalsource.ingplans.com>.

The plan allows you to elect how much salary you want to contribute so you can tailor your own retirement package to meet your individual needs. The School will provide a match that will be automatically credited to your retirement account. Please note that contribution match amounts may vary from network to network. There is no vesting schedule for your schools match.

Because your contribution to a Retirement/401(k) plan is automatically deducted from your pay before federal and state tax withholdings are calculated, you save tax dollars now by having your current taxable amount reduced. While the amounts deducted generally will be taxed when they are finally distributed, favorable tax rules typically apply to distributions.

Complete details of the Retirement Plan/401(k) savings plan are described in the Summary Plan Description provided to eligible employees. Contact the Human Resources Department for more information about the Retirement Program.

3-15. Flexible Spending Account (FSA)

ADP TotalSource provides a Flexible Spending Account (FSA) program that allows employees to have pre-tax dollars deducted from their salaries to pay for eligible out-of-pocket expenses. The pre-tax contributions made to the FSA can be used to pay for predictable non-reimbursed health care expenses and dependent care expenses during the plan year. Through the FSA program, you can reduce your taxable income without reducing your real income, so that you can keep more of the money you earn.

Employees in the following employment classifications are eligible to participate in the Flexible Spending Account program:

- Regular full-time employees
- Regular part-time employees working on average 30 hours weekly in a year
- Participation in the Health Care and/or Dependent Care FSA is optional and determined on an annual basis for the plan year. You must enroll for each plan year. You determine how much to contribute to the account, up to a specified maximum, based on anticipated expenses during the plan year. You may contribute up to a maximum of \$2,500 dollars each year for your Health Care FSA. The maximum contribution for your Dependent Care FSA is \$5,000 dollars per year. Contributions are directed to the account through salary reduction on a pre-tax basis. This tax-free money is then available to you for reimbursement of out-of-pocket expenses. Since the amounts that remain in the account at the end of the plan year are forfeited, you should take care not to over-fund your account.
- Details of the Flexible Spending Account program are described in the Summary Plan Description (SPD). Contact the ADP TotalSource for more information on the Flexible Spending Account program and to obtain enrollment and reimbursement forms and worksheets with examples of reimbursable and non-reimbursable expenses.

Section 4 - Leaves of Absence

4-1. Family and Medical Leave

The Leave Policy

Employees may be entitled to a leave of absence under the Family and Medical Leave Act (FMLA). This policy provides employees information concerning FMLA entitlements and obligations employees may have during such leaves. If employees have any questions concerning FMLA leave, they should contact their supervisor or ADP TotalSource.

I. Eligibility

FMLA leave is available to "eligible employees." To be an "eligible employee," an employee must: 1) have been employed by a covered School* for at least 12 months (which need not be consecutive); 2) have been employed by The School for at least 1,250 hours of service during the 12-month period immediately preceding the commencement of the leave; and 3) be employed at a worksite where 50 or more employees are located within 75 miles of the worksite.

***Note a covered School is one which has employed 50 or more employees for at least 20 workweeks in the current or preceding calendar year.**

II. Entitlements

The FMLA provides eligible employees with a right to leave, applicable health insurance benefits and, with some limited exceptions, job restoration. The FMLA also entitles employees to certain written notices concerning their potential eligibility for and designation of FMLA leave.

A. Basic FMLA Leave Entitlement:

The FMLA provides eligible employees up to 12 workweeks of unpaid leave for certain family and medical reasons during a 12-month period. The 12-month period is determined based on a rolling 12-month period measured backward from the date an employee uses his/her FMLA leave. Leave may be taken for any one, or for a combination, of the following reasons:

- To care for the employee's child after birth or placement for adoption or foster care;
- To care for the employee's spouse, son, daughter or parent (but not in-law) who has a **serious health condition**;
- For the employee's own serious health condition (including any period of incapacity due to pregnancy, prenatal medical care or childbirth) that makes the employee unable to perform one or more of the essential functions of the employee's job; and/or

- Because of any **qualifying exigency** arising out of the fact that an employee's spouse, son, daughter or parent is a covered military member on covered active duty or called to covered active duty status (or has been notified of an impending call or order to covered active duty) in the Reserves component of the Armed Forces in support of contingency operations or Regular Armed Forces for deployment to a foreign country. This leave also is available for family members of active duty service members.

A **serious health condition** is an illness, injury, impairment or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job, or prevents the qualified family member from participating in school or other daily activities. Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, caring for the parents of the military member on covered active duty and attending post-deployment reintegration briefings.

Note: Eligible employees may elect to apply any available PTO to continue their compensation upon commencement of their FMLA. In the event that the employee does not actively begin the school year, PTO may be applied for payment upon their return.

B. Additional Military Family Leave Entitlement (Injured Service member Leave)

In addition to the basic FMLA leave entitlement discussed above, an eligible employee who is the spouse, son, daughter, parent or next of kin of a **covered service member** is entitled to take up 26 weeks of leave during a single 12-month period to care for the service member with a serious injury or illness. Leave to care for a service member shall only be available during a single-12 month period and, when combined with other FMLA-qualifying leave, may not exceed 26 weeks during the single 12-month period. The single 12-month period begins on the first day an eligible employee takes leave to care for the injured service member.

A "**covered service member**" is a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status or is on the temporary retired list, for a serious injury or illness. These individuals are referred to in this policy as "current members of the Armed Forces."

Covered service members also include a veteran who is discharged or released from military services under condition other than dishonorable at any time during the five years preceding the date the eligible employee takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation or therapy for a serious injury or illness. These individuals are referred to in this policy as "covered veterans."

The FMLA definitions of a "serious injury or illness" for current Armed Forces members and covered veterans are distinct from the FMLA definition of "serious health condition" applicable to FMLA leave to care for a covered family member.

C. Intermittent Leave and Reduced Leave Schedules

FMLA leave usually will be taken for a period of consecutive days, weeks or months. However, employees also are entitled to take FMLA leave intermittently or on a reduced leave schedule when medically necessary due to a serious health condition of the employee or covered family member or the serious injury or illness of a covered service member.

D. No Work While on Leave

The taking of another job while on family/medical leave or any other authorized leave of absence is grounds for immediate termination, to the extent permitted by law.

E. Protection of Group Health Insurance Benefits

During FMLA leave, eligible employees are entitled to receive group health plan coverage (if applicable) on the same terms and conditions as if they had continued to work.

F. Restoration of Employment and Benefits

At the end of FMLA leave, subject to some exceptions including situations where job restoration of "key employees" will cause The School substantial and grievous economic injury, employees generally have a right to return to the same or equivalent positions with equivalent pay, benefits and other employment terms. The School will notify employees if they qualify as "key employees," if it intends to deny reinstatement, and of their rights in such instances. Use of FMLA leave will not result in the loss of any employment benefit that accrued prior to the start of an eligible employee's FMLA leave.

G. Notice of Eligibility for, and Designation of, FMLA Leave

Employees requesting FMLA leave are entitled to receive written notice from The School telling them whether they are eligible for FMLA leave and, if not eligible, the reasons why they are not eligible. When eligible for FMLA leave, employees are entitled to receive written notice of: 1) their rights and responsibilities in connection with such leave; 2) The School's designation of leave as FMLA-qualifying or non-qualifying, and if not FMLA-qualifying, the reasons why; and 3) the amount of leave, if known, that will be counted against the employee's leave entitlement.

The School may retroactively designate leave as FMLA leave with appropriate written notice to employees provided The School's failure to designate leave as FMLA-qualifying at an earlier date did not cause harm or injury to the employee. In all cases where leaves qualify for FMLA protection, The School and employee can mutually agree that leave be retroactively designated as FMLA leave.

III. Employee FMLA Leave Obligations

A. Provide Notice of the Need for Leave

Employees who take FMLA leave must timely notify The School of their need for FMLA leave. The following describes the content and timing of such employee notices.

1. Content of Employee Notice

To trigger FMLA leave protections, employees must inform their supervisor or ADP TotalSource (866-217-0733), Option 1 or email: Totalsource.FMLA@adp.com) of the need for FMLA-qualifying leave and the anticipated timing and duration of the leave, if known. Employees may do this by either requesting FMLA leave specifically, or explaining the reasons for leave so as to allow The School to determine that the leave is FMLA-qualifying. For example, employees might explain that:

- a medical condition renders them unable to perform the functions of their job;
- they are pregnant or have been hospitalized overnight;
- they or a covered family member are under the continuing care of a health care provider;
- the leave is due to a qualifying exigency cause by a covered military member being on active duty or called to active duty status; or
- if the leave is for a family member, that the condition renders the family member unable to perform daily activities or that the family member is a covered service member with a serious injury or illness.

Calling in "sick," without providing the reasons for the needed leave, will not be considered sufficient notice for FMLA leave under this policy. Employees must respond to The School's questions to determine if absences are potentially FMLA-qualifying.

If employees fail to explain the reasons for FMLA leave, the leave may be denied. When employees seek leave due to FMLA-qualifying reasons for which The School has previously provided FMLA-protected leave, they must specifically reference the qualifying reason for the leave or the need for FMLA leave.

2. Timing of Employee Notice

Employees must provide 30 days' advance notice of the need to take FMLA leave when the need is foreseeable. When 30 days' notice is not possible, or the approximate timing of the need for leave is not foreseeable, employees must provide The School and/or ADP TotalSource notice of the need for leave as soon as practicable under the facts and circumstances of the particular case. Employees, who fail to give 30 days' notice for foreseeable leave without a reasonable excuse for the delay, or otherwise fail to satisfy FMLA notice obligations, may have FMLA leave delayed or denied.

B. Cooperate in the Scheduling of Planned Medical Treatment (Including Accepting Transfers to Alternative Positions) and Intermittent Leave or Reduced Leave Schedules

When planning medical treatment, employees must consult with The School and make a reasonable effort to schedule treatment so as not to unduly disrupt The School's operations, subject to the approval of an employee's health care provider. Employees must consult with The School prior to the scheduling of treatment to work out a treatment schedule that best suits the needs of both The School and the employees, subject to the approval of an employee's health care provider. If employees providing notice of the need to take FMLA leave on an intermittent basis for planned medical treatment neglect to fulfill this obligation, The School may require employees to attempt to make such arrangements, subject to the approval of the employee's health care provider.

When employees take intermittent or reduced work schedule leave for foreseeable planned medical treatment for the employee or a family member, including during a period of recovery from a serious health condition or to care for a covered service member, The School may temporarily transfer employees, during the period that the intermittent or reduced leave schedules are required, to alternative positions with equivalent pay and benefits for which the employees are qualified and which better accommodate recurring periods of leave.

When employees seek intermittent leave or a reduced leave schedule for reasons unrelated to the planning of medical treatment, upon request, employees must advise The School of the reason why such leave is medically necessary. In such instances, The School and employee shall attempt to work out a leave schedule that meets the employee's needs without unduly disrupting The School's operations, subject to the approval of the employee's health care provider.

C. Submit Medical Certifications Supporting Need for FMLA Leave (Unrelated to Requests for Military Family Leave)

Depending on the nature of FMLA leave sought, employees may be required to submit medical certifications supporting their need for FMLA-qualifying leave. As described below, there generally are three types of FMLA medical certifications: an **initial certification**, a **recertification** and a **return to work/fitness for duty certification**.

It is the employee's responsibility to provide The School with timely, complete and sufficient medical certifications. Whenever The School requests employees to provide FMLA medical certifications, employees must provide the requested certifications within 15 calendar days after The School's request, unless it is not practicable to do so despite an employee's diligent, good faith efforts. The School shall inform employees if submitted medical certifications are incomplete or insufficient and provide employees at least seven calendar days to cure deficiencies. The School will deny FMLA leave to employees who fail to timely cure deficiencies or otherwise fail to timely submit requested medical certifications.

With the employee's permission, The School (through individuals other than an employee's direct supervisor) may contact the employee's health care provider to authenticate or clarify completed and sufficient medical certifications. If employees choose not to provide The School with authorization allowing it to clarify or authenticate certifications with health care providers, The School may deny FMLA leave if certifications are unclear.

Whenever The School deems it appropriate to do so, it may waive its right to receive timely, complete and/or sufficient FMLA medical certifications.

1. Initial Medical Certifications

Employees requesting leave because of their own, or a covered relation's, serious health condition, or to care for a covered service member, must supply medical certification supporting the need for such leave from their health care provider or, if applicable, the health care provider of their covered family or service member. If employees provide at least 30 days' notice of medical leave, they should submit the medical certification before leave begins. A new initial medical certification will be required on an annual basis for serious medical conditions lasting beyond a single leave year.

If The School has reason to doubt initial medical certifications, it may require employees to obtain a second opinion at The School's expense. If the opinions of the initial and second health care providers differ, The School may, at its expense, require employees to obtain a third, final and binding certification from a health care provider designated or approved jointly by The School and the employee.

2. Medical Recertification's

Depending on the circumstances and duration of FMLA leave, The School may require employees to provide recertification of medical conditions giving rise to the need for leave. The School will notify employees if recertification is required and will give employees at least 15 calendar days to provide medical recertification.

3. Return to Work/Fitness for Duty Medical Certifications

Unless notified that providing such certifications is not necessary, employees returning to work from FMLA leaves that were taken because of their own serious health conditions that made them unable to perform their jobs must provide The School medical certification confirming they are able to return to work and the employees' ability to perform the essential functions of the employees' position, with or without reasonable accommodation. The School may delay and/or deny job restoration until employees provide return to work/fitness for duty certifications.

D. Submit Certifications Supporting Need for Military Family Leave

Upon request, the first time employees seek leave due to qualifying exigencies arising out of the active duty or call to active duty status of a covered military member, The School may require employees to provide: 1) a copy of the covered military member's active duty orders or other documentation issued by the military indicating the covered military member is on active duty or call to active duty status and the dates of the covered military member's active duty service; and 2) a certification from the employee setting forth information concerning the nature of the qualifying exigency for which leave is requested. Employees shall provide a copy of new active duty orders or other documentation issued by the military for leaves arising out of qualifying exigencies arising out of a different active duty or call to active duty status of the same or a different covered military member.

When leave is taken to care for a covered service member with a serious injury or illness, The School may require employees to obtain certifications completed by an authorized health care provider of the covered service member. In addition, and in accordance with the FMLA regulations, The School may request that the certification submitted by employees set forth additional information provided by the employee and/or the covered service member confirming entitlement to such leave.

E. Reporting Changes to Anticipated Return Date & Periodically Concerning Intent to Return to Work

Employees must contact ADP TotalSource at 866-217-0733, Option 1 periodically in accordance with the instructions noted on the Eligibility Notice regarding their status and intention to return to work at the end of the FMLA leave period. If an employee's anticipated return to work date changes and it becomes necessary for the employee to take more or less leave than originally anticipated, the employee must provide The School or ADP TotalSource with reasonable notice (i.e., within two business days) of the employee's changed circumstances and new return to work date. If employees give The School unequivocal notice of their intent not to return to work, they will be considered to have voluntarily resigned and The School's obligation to maintain applicable health benefits (subject to COBRA requirements) and to restore their positions will cease.

F. Substitute Paid Leave for Unpaid FMLA Leave

Employees must (unless The School specifically informs employees otherwise) use any accrued paid time off while taking unpaid FMLA leave. The substitution of paid time for unpaid FMLA leave time does not extend the length of FMLA leaves and the paid time will run concurrently with an employee's FMLA/CFMLA entitlement.

Leaves of absence taken in connection with a disability leave plan or workers' compensation injury/illness shall run concurrently with any FMLA leave entitlement. Upon written request, The School will allow employees to use accrued paid time off to supplement any paid disability benefits.

G. Pay Employee's Share of Health Insurance Premiums

During FMLA leave, employees are entitled to continued group health plan coverage (if applicable) under the same conditions as if they had continued to work. Unless The School notifies employees of other arrangements, whenever employees are receiving pay from The School during FMLA leave, The School will deduct the employee portion of the group health plan premium from the employee's paycheck in the same manner as if the employee was actively working.

If FMLA leave is unpaid, employees must pay their portion of the group health premium through a "pay-as-you-go" method. Employees should contact the HR Department at Academica to make these arrangements.

The School's obligation to maintain health care coverage ceases if an employee's premium payment is more than 30 days late. If an employee's payment is more than 15 days late, The School will send a letter notifying the employee that coverage will be dropped on a specified date unless the co-payment is received before that date. If employees do not return to work within 30 calendar days at the end of the leave period (unless employees cannot return to work because of a serious health condition or other circumstances beyond their control), they will be required to reimburse The School for the cost of the premiums The School paid for maintaining coverage during their unpaid FMLA leave.

IV. Exemption for Highly Compensated Employees

The School may choose not to return highly compensated employees (highest paid 10% of employees at a worksite or within 75 miles of that worksite) to their former or equivalent positions following a leave if restoration of employment will cause substantial economic injury to The School. (This fact-specific determination will be made by The School on a case-by-case basis.) The School will notify you if you qualify as a "highly compensated" employee, if The School intends to deny reinstatement, and of your rights in such instances.

V. Questions and/or Complaints about FMLA Leave

If you have questions regarding this FMLA policy, please contact your supervisor or ADP TotalSource (866-217-0733), Option 1 or email: Totalsource.FMLA@adp.com) The School is committed to complying with the FMLA and, whenever necessary, shall interpret and apply this policy in a manner consistent with the FMLA.

The FMLA makes it unlawful for employers to: 1) interfere with, restrain or deny the exercise of any right provided under FMLA; or 2) discharge or discriminate against any person for opposing any practice made unlawful by FMLA or involvement in any proceeding under or relating to FMLA. If employees believe their FMLA rights have been violated, they should contact ADP TotalSource immediately. The School will investigate any FMLA complaints and take prompt and appropriate remedial action to address and/or remedy any FMLA violation. Employees also may file FMLA complaints with the United States Department of Labor or may bring private lawsuits alleging FMLA violations.

VI. Coordination of FMLA Leave with Other Leave Policies

The FMLA does not affect any federal, state or local law prohibiting discrimination, or supersede any State or local law that provides greater family or medical leave rights. For additional information concerning leave entitlements and obligations that might arise when FMLA leave is either not available or exhausted, please consult The School's other leave policies in your School handbook as applicable or contact your supervisor or ADP TotalSource.

4-2. Extended Leave of Absence

You are eligible after one (1) year of full-time employment with your school to request additional leave time provided to you by The School's leave policy. Your school does not provide you with compensation during any FMLA or Extended Leave.

In the event that you wish to take additional leave time (Extended Leave) to the time provided to you by FMLA, you may do so by only until the end of your current contract with your school or one (1) year from the date of your initial leave. In the event that you wish to take longer than 12 weeks FMLA leave, you must follow the following procedures:

1. Place this request in writing, stating the dates you will not be working at your school location. This information will be utilized to hire a replacement for your period of leave. During any Extended Leave period (i.e., after the 12 weeks of FMLA leave).
2. Contact Academics's HR Department to coordinate the continuation of your benefits during your extended leave of absence. You will be eligible, after the 12 weeks of FMLA, to continue your insurance benefits through the election of COBRA with ADP TotalSource.

If you do not execute a new contract with your school to commence employment on the first day of the next school year, your position with your school will not be held.

Please note: You will not accrue any sick/personal time during the time that you are on leave. These accruals will commence upon your return to work.

4-3. Maternity/Paternity Leave of Absence

Full-time employees may take up to one (1) year of maternity/paternity leave after one (1) full year of employment with The School for any of the following reasons (1) the birth of a child, or (2) the placement of a child with you for adoption or foster care and to care for the newly placed child. This type of leave must be completed within the 12-month period beginning on the date of birth or placement.

During this unpaid leave, the School will reimburse the cost of the employee's health insurance. The amount to be reimbursed by The School will not exceed the amount the School has allotted as the "employer contribution" for insurance benefits.

If the leave period exceeds the 12-week period prescribed by FMLA, the employee may continue with their current benefit elections by completing the necessary documents and paying for the benefit premium provided under COBRA. The School will reimburse the employee directly for up to the one year limit, once the employee returns to work from their leave of absence. Employees will be responsible for making payments directly to ADP TotalSource for the full portion of the benefits.

Any employee beginning his/her second year of employment who will be taking leave during that year must work the full first quarter in order to have The School's allotted portion of the benefits paid. In the case where an employee is unable to finish the first quarter but returns to complete an equivalent of 2 full quarters during the current school year, may be reimbursed the benefits during the leave period. In applicable districts where said breaks are paid, any employee who is returning from leave prior to Christmas break must return by the first work day in December in order to receive payment for the break and by the on the first day of the month in which Spring Break begins, in order to receive payment for the break. Employees who chose to not return to The School after the (1) year term, may be liable to The School for any payments made by The School in excess of the initial 12-week FMLA period.

Note: Any teacher who takes leave must work a minimum of 99 days during the current school year in order to gain a year of credit. Please feel free to contact Human Resources directly if you should have any concerns regarding this policy. Personal time will not be accrued during the time of leave.

Section 5 - General Standards of Conduct

5-1. Workplace Conduct

The School endeavors to maintain a positive work environment. Each employee plays a role in fostering this environment. Accordingly, we all must abide by certain rules of conduct, based on honesty, common sense and fair play.

Because everyone may not have the same idea about proper workplace conduct, it is helpful to adopt and enforce rules all can follow. Unacceptable conduct may subject the offender to disciplinary action, up to and including discharge, in The School's sole discretion. The following are examples of some, but not all, conduct which can be considered unacceptable:

1. Obtaining employment on the basis of false or misleading information.
2. Stealing, removing or defacing school property or a co-worker's property, and/or disclosure of confidential business information.
3. Completing another employee's time records.
4. Violation of safety rules and policies.
5. The unlawful or unauthorized use, abuse, solicitation, distribution, theft, possession, transfer, purchase, or sale of drugs, drug paraphernalia or alcohol by an individual anywhere on Company premises, while on Company business (whether or not on Company premises), or while representing the Company, reporting to work, or remaining on duty after using drugs or alcohol in any amount that adversely affects the employee's ability to perform the functions of the job. Please refer to your Company's specific policy (if any) for additional information.
6. Fighting, threatening or disrupting the work of others or other violations of the school's Workplace Violence Policy.
7. Failure to follow lawful instructions of a supervisor.
8. Failure to perform assigned job duties.
9. Violation of the Punctuality and Attendance Policy, including but not limited to irregular attendance, habitual lateness or unexcused absences.
10. Gambling on School property.
11. Willful or careless destruction or damage to School assets or to the equipment or possessions of another employee.

12. Wasting work materials.
13. Performing work of a personal nature during working time.
14. Violation of the Solicitation and Distribution Policy.
15. Violation of the school's Harassment or Equal Employment Opportunity Policies.
16. Violation of the Communication and Computer Systems Policy.
17. Unsatisfactory job performance.
18. Any other violation of School policy.

Obviously, not every type of misconduct can be listed. Note that all employees are employed at-will, and The School reserves the right to impose whatever discipline it chooses, or none at all, in a particular instance. The School will deal with each situation individually and nothing in this handbook should be construed as a promise of specific treatment in a given situation. However, the school will endeavor to utilize progressive discipline but reserves the right in its sole discretion to terminate an employee at any time for any reason.

The observance of these rules will help to ensure that our workplace remains a safe and desirable place to work.

5-2. Professional Judgment

1. Maintain a professional barrier between you and the students. You are the adult, the teacher and the professional; act like the expert, not like another one of the "kids". Teachers should not give out personal e-mail addresses or cell phone numbers; only work their work e-mail address.
2. Keep the classroom door open when talking with students.
3. Refer students to the appropriate resource person for counseling and/or discussions about personal matters.
4. Do not flirt with students.
5. Do not participate in making inappropriate jokes or allow your students to make inappropriate jokes.
6. Do not discuss your personal life or personal matters with students. Do not discuss your husband, wife, girlfriend, boyfriend, or dates with students.
7. When transporting students, coordinate transportation ahead of time, and use school or mass transportation if possible. If necessary, call a taxi for the student. If you must transport a student in your vehicle, ask a co-worker to accompany you.
8. Avoid leaving your students unsupervised; have an alternate plan of action.
9. Keep your hands and other parts of your body to yourself.
10. Use verbal praise and reinforcement.

11. Know your school policies and District and State laws governing corporal punishment. Establish and follow a consistent behavior plan. Treat each student with respect. Know the student's rights.
12. Chaperone only school-sponsored functions. Do not socialize with students. If you chaperone a field trip, put in writing what your responsibilities will be.
13. Do not drink alcoholic beverages in front of your students, while representing The School or wearing your school uniform.
14. Do not take children home with you.
15. Do not make telephone calls or write notes of a personal nature to students.
16. Do not harass students; respect their differences. What you intend as humor, may, in fact, be cultural bias or harassment.
17. Keep your co-workers and supervisors informed; work and communicate as a team; plan and teach together
18. Communicate with parents and document your communication.
19. Dress and act appropriately and professionally. You are a role model in the community as well as in The School; be a good example for students
20. Use common sense and good judgment.
21. Avoid putting yourself in a position where you have to defend, explain, or justify your behavior or actions.
22. Maintain a professional reputation in the community. Even when you are off the job, be discreet.

****Non-Instructional Personnel****

1. Do not discipline, counsel or touch students. Notify an administrator if you believe a student is misbehaving.
2. Do not flirt with students, staff members, and co-workers
3. Do not discuss your personal life or personal matters with students, staff members and co-workers
4. Know and follow your school's policy regarding reporting absences and tardies. Be present and on time each day.
5. Wear your uniform if your job requires it.
6. Do not use profanity.

5-3. Punctuality and Attendance

You were hired to perform an important function at The School. As with any group effort, operating effectively takes cooperation and commitment from everyone. Therefore, your attendance and punctuality are very important. Unnecessary absences and lateness are expensive, disruptive and place an unfair burden on your fellow employees and your Supervisors. We expect excellent attendance from each of you. Excessive absenteeism or tardiness will result in disciplinary action up to and including discharge.

We do recognize, however, that there are times when absences and tardiness cannot be avoided. In such cases, you are expected to notify your Supervisor as early as possible, but no later than the start of your work day. Asking another employee, friend or relative to give this notice is improper and constitutes grounds for disciplinary action. Please call, stating the nature of your illness and its expected duration, every day that you are absent.

Unreported absences of three consecutive work days generally will be considered a voluntary resignation of your employment with The School.

5-4. Transfers within Academica Serviced Schools

Any employee who wishes to transfer to another Academica serviced School must first request an approved transfer form from their current school. Upon receipt of the approved transfer, employee may seek employment with their school of choice.

School needs will dictate whether or not transfers will be permitted. Transfers will be considered on a first come-first serve basis.

5-5. Use of Communication and Computer Systems

The School communication and computer systems are intended for business purposes and may be used only during working time; however limited personal usage is permitted if it does not hinder performance of job duties or violate any other School policy. This includes the voice mail, e-mail and Internet systems. Users have no legitimate expectation of privacy in regard to their use of the systems.

The school may access the voice mail and e-mail systems and obtain the communications within the systems, including past voice mail and e-mail messages, without notice to users of the system, in the ordinary course of business when The School deems it appropriate to do so. The reasons for which The School may obtain such access include, but are not limited to: maintaining the system; preventing or investigating allegations of system abuse or misuse; assuring compliance with software copyright laws; complying with legal and regulatory requests for information; and ensuring that School operations continue appropriately during an employee's absence.

Further, the school may review Internet usage to ensure that such use with School property, or communications sent via the Internet with School property, are appropriate. The reasons for which The School may review employees' use of the Internet with School property include, but are not limited to: maintaining the system; preventing or investigating allegations of system abuse or misuse; assuring compliance with software copyright laws; complying with legal and regulatory requests for information; and ensuring that School operations continue appropriately during an employee's absence.

The School may store electronic communications for a period of time after the communication is created. From time to time, copies of communications may be deleted.

The School's policies prohibiting harassment, in their entirety, apply to the use of School's communication and computer systems. No one may use any communication or computer system in a manner that may be construed by others as harassing or offensive based on race, national origin, sex, sexual orientation, age, disability, religious beliefs or any other characteristic protected by federal, state or local law.

Since The School's communication and computer systems are intended for business use, these systems may not be used to solicit for religious or political causes or outside organizations.

Further, since The School's communication and computer systems are intended for business use, all employees, upon request, must inform management of any private access codes or passwords.

Unauthorized duplication of copyrighted computer software violates the law and is strictly prohibited.

No employee may access, or attempt to obtain access to, another employee's computer systems without appropriate authorization.

Violators of this policy may be subject to disciplinary action, up to and including discharge.

5-6. Use of Social Media

The School respects the right of any employee to maintain a blog or web page or to participate in a social networking, Twitter or similar site, including but not limited to Facebook and LinkedIn. However, to protect Company interests and ensure employees focus on their job duties, employees must adhere to the following rules:

Employees may not post on a blog or web page or participate on a social networking, Twitter or similar site during working time or at any time with Company equipment or property.

All rules regarding confidential and proprietary business information apply in full to blogs, web pages, social networking, Twitter and similar sites. Any information that cannot be disclosed through a conversation, a note or an e-mail also cannot be disclosed in a blog, web page, social networking, Twitter or similar site.

Whether an employee is posting something on his or her own blog, web page, social networking, Twitter or similar site or on someone else's, if the employee mentions the Company and also expresses either a political opinion or an opinion regarding the Company's actions that could pose an actual or potential conflict of interest with the Company, the poster must include a disclaimer. The poster should specifically state that the opinion expressed is his/her personal opinion and not the Company's position. This is necessary to preserve the Company's good will in the marketplace.

Any conduct that is impermissible under the law if expressed in any other form or forum is impermissible if expressed through a blog, web page, social networking, Twitter or similar site. For example, posted material that is discriminatory, obscene, defamatory, libelous or violent is forbidden. Company policies apply equally to employee social media usage.

The School encourages all employees to keep in mind the speed and manner in which information posted on a blog, web page, and/or social networking site is received and often misunderstood by readers. Employees must use their best judgment. Employees with any questions should review the guidelines above and/or consult with their manager. Failure to follow these guidelines may result in discipline, up to and including termination.

Connecting with Students

Staff will not represent or create the inference on any social media posting that they speak on behalf of the school, the District or the Board or its members.

The use of District time and/or equipment for personal social media activities is prohibited.

Staff may be disciplined by the District for inappropriate social media behavior, even if it occurs off campus.

Inappropriate personal communications using social media is prohibited.

Some social media sites allow users to become a "friend" or otherwise associate their "profiles" in a more private and personal arrangement which may mask inappropriate conduct. Staff members are discouraged from "friending" students on Facebook or other similar websites/applications, other than for the limited purpose of communications necessary to further educational objectives.

5-7. Personal and School-Provided Portable Communication Devices

School-provided portable communication devices (PCDs), including cell phones and personal digital assistants, should be used primarily for business purposes. Employees have no reasonable expectation of privacy in regard to the use of such devices, and all use is subject to monitoring, to the maximum extent permitted by applicable law. This includes as permitted the right to monitor personal communications as necessary.

Some employees may be authorized to use their own PCD for business purposes. These employees should work with the IT department to configure their PCD for business use. Communications sent via a personal PCD also may be subject to monitoring if sent through The School's networks and the PCD must be provided for inspection and review upon request.

All conversations, text messages and e-mails must be professional. When sending a text message or using a PCD for business purposes, whether it is a School-provided or personal device, employees must comply with applicable School guidelines, including policies on sexual harassment, discrimination, conduct, confidentiality, equipment use and operation of vehicles. Using a School-issued PCD to send or receive personal text messages is prohibited at all times and personal use during working hours should be limited to emergency situations.

If an employee who uses a personal PCD for business resigns or is terminated, the employee will be required to submit the device to the IT department for resetting on or before his or her last day of work. At that time, the IT department will reset and remove all information from the device, including but not limited to, School information and personal data (such as contacts, e-mails and photographs). The IT department will make efforts to provide employees with the personal data in another form (e.g., on a disk) to the extent practicable; however, the employee may lose some or all personal data saved on the device.

Employees may not use their personal PCD for business unless they agree to submit the device to the IT department on or before their last day of work for resetting and removal of School information. This is the only way currently possible to ensure that all School information is removed from the device at the time of termination. The removal of School information is crucial to ensure compliance with The School's confidentiality and proprietary information policies and objectives.

Please note that whether employees use their personal PCD or a School-issued device, The School's electronic communications policies, including but not limited to, proper use of communications and computer systems, remain in effect.

Portable Communication Device Use While Driving

Employees who drive on School business must abide by all state or local laws prohibiting or limiting PCD (cell phone or personal digital assistant) use while driving. Further, even if usage is permitted, employees may choose to refrain from using any PCD while driving. "Use" includes, but is not limited to, talking or listening to another person or sending an electronic or text message via the PCD.

Regardless of the circumstances, including slow or stopped traffic, if any use is permitted while driving, employees should proceed to a safe location off the road and safely stop the vehicle before placing or accepting a call. If acceptance of a call is absolutely necessary while the employee is driving, and permitted by law, the employee must use a hands-free option and advise the caller that he/she is unable to speak at that time and will return the call shortly.

Under no circumstances should employees feel that they need to place themselves at risk to fulfill business needs.

Since this policy does not require any employee to use a cell phone while driving, employees who are charged with traffic violations resulting from the use of their PCDs while driving will be solely responsible for all liabilities that result from such actions.

Texting and e-mailing while driving is prohibited in all circumstances.

5-8. Camera Phones/Recording Devices

Due to the potential for issues such as invasion of privacy, sexual harassment, and loss of productivity, no employee may use a camera phone function on any phone on school property or while performing work for The School.

The use of tape recorders, dictaphones or other types of voice recording devices anywhere on School property, including to record conversations or activities of other employees or management, or while performing work for The School, is also strictly prohibited, unless the device was provided to you by The School and is used solely for legitimate business purposes.

5-9. Inspections

The School reserves the right to require employees while on School property, or on client property, to agree to the inspection of their persons, personal possessions and property, personal vehicles parked on School or client property, and work areas. This includes lockers, vehicles, desks, cabinets, work stations, packages, handbags, briefcases and other personal possessions or places of concealment, as well as personal mail sent to The School or to its clients.

Employees are expected to cooperate in the conduct of any search or inspection.

5-10. Smoking/Alcoholic Beverages/Drugs

The School building and school grounds are non-smoking areas. You are a mentor to your students, and therefore, should set a good example for your students. Smoking, consumption of alcoholic beverages, and use of controlled (non-prescribed) drugs are not permitted by any employee on The School grounds, or outside The School grounds while wearing The School uniform or representing The School in a school-sponsored event. Violation of this rule may result in immediate termination.

5-11. Parking

Each school site will have different areas where the staff may park. Parking is not guaranteed to be adjacent to any school facility, and may be slightly inconvenient at times. Check with your principal during the employee orientation sessions regarding parking availability.

5-12. Housekeeping

You are required to maintain your classroom in a neat and orderly fashion. Please report any items that are in need of repair immediately to your principal.

5-13. Personal Visits and Telephone Calls

Disruptions during working time can lead to errors and delays. Therefore, we ask that personal telephone calls be kept to a minimum, and only be made or received after working time, or during lunch or break time.

For safety and security reasons, employees are prohibited from having personal guests visit or accompany them anywhere in our facilities other than the reception areas.

5-14. Solicitation and Distribution

To avoid distractions, solicitation by an employee of another employee is prohibited while either employee is on working time. "Working time" is the time an employee is engaged, or should be engaged, in performing his/her work tasks for the school. Solicitation of any kind by non-employees on School premises is prohibited at all times.

Distribution of advertising material, handbills, printed or written literature of any kind in working areas of School is prohibited at all times. Distribution of literature by non-employees on School premises is prohibited at all times.

5-15. Bulletin Boards

Important notices and items of general interest are continually posted on our bulletin board. Make it a practice to review it frequently. This will assist you in keeping up with what is current at The School. To avoid confusion, please do not post or remove any material from the bulletin board and sent through electronic email to your school email account.

5-16. Business Ethics and Conduct

The successful business operation and reputation of The School is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of The School is dependent upon our customers' trust and we are dedicated to preserving that trust. Employees owe a duty to The School, its students, parents and vendors to act in a way that will merit the continued trust and confidence of the public.

The School will comply with all applicable laws and regulations and expects its directors, officers, and employees to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, the use of good judgment, based on high ethical principles, will guide you with respect to lines of acceptable conduct. If you are uncertain about whom to contact at any time regarding any matter or situation, please contact the Human Resource Department at Academica for your school at (305) 669-2906, and, if necessary, with the ADP MyLife Advisors at (1-800-554-1802) for advice and consultation.

In addition to compliance with the regulations and policies of The School and The School Board of the county in which The School is located, The School expects its directors, officers and employees to comply with all State of Iowa Board of Education Administrative Rules including but not limited to the Code of Ethics – Educational Profession.

Compliance with this policy of business ethics and conduct is the responsibility of every employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including possible termination of employment.

5-17. Conflicts of Interest

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. This policy establishes only the framework within which The School wishes the business to operate. The purpose of these guidelines is to provide general direction so that employees can seek further clarification on issues related to the subject of acceptable standards of operation. Contact your principal or Human Resource Manager for more information or questions about conflicts of interest.

Transactions with outside firms must be conducted within a framework established and controlled by the Board of Directors. Business dealings with outside firms should not result in unusual gains for those firms. Unusual gain refers to bribes, product bonuses, special fringe benefits, unusual price breaks, and other windfalls designed to ultimately benefit either, the employer, the employee, or both. Promotional plans that could be interpreted to involve unusual gain require specific executive-level approval.

An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative as a result of The School's business dealings. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

No "presumption of guilt" is created by the mere existence of a relationship with outside firms. However, if employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that they disclose to the Principal or Human Resource Manager as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which The School does business, but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealings involving The School. You must have the approval of your Principal and Human Resource Manager prior to accepting a gift from any vendor, supplier, etc.

5-18. Non-Competition

The Teacher agrees that in the event of his/her breach of any term and/or condition of this Agreement, she/he will not thereafter, either directly or indirectly, seek employment for a period of (3) months after leaving said employment with any school, private or public, within a fifteen (15) mile radius of The School.

5-19. Use of Facilities, Equipment and Property, Including Intellectual Property

Equipment essential in accomplishing job duties is often expensive and may be difficult to replace. When using property, employees are expected to exercise care, perform required maintenance, and follow all operating instructions, safety standards and guidelines.

Please notify your Supervisor if any equipment, machines, or tools appear to be damaged, defective, or in need of repair. Prompt reporting of loss, damages, defects, and the need for repairs could prevent deterioration of equipment and possible injury to employees or others. The Supervisor can answer any questions about an employee's responsibility for maintenance and care of equipment used on the job.

Employees also are prohibited from any unauthorized use of The School's intellectual property, such as audio and video tapes, print materials and software.

Improper, careless, negligent, destructive, or unsafe use or operation of equipment can result in discipline, up to and including discharge.

Further, The School is not responsible for any damage to employees' personal belongings unless the employee's Supervisor provided advance approval for the employee to bring the personal property to work.

5-20. Health and Safety

To assist in providing a safe and healthful work environment for employees, customers, and visitors, ADP TotalSource has established a workplace safety program. This program is a top priority for The School and ADP TotalSource. The Safety Officer has responsibility for implementing, administering, monitoring, and evaluating the safety program. Its success depends on the alertness and personal commitment of all. Please contact Human Resources with regards to questions for your Safety Officer.

ADP TotalSource and The School provide information to employees about workplace safety and health issues through regular internal communication channels such as supervisor-employee meetings, bulletin board postings, memos, or other written communications.

Some of the best safety improvement ideas come from employees. Those with ideas, concerns, or suggestions for improved safety in the workplace are encouraged to raise them with their supervisor, or with another supervisor or manager, or bring them to the attention of the Safety Officer. Reports and concerns about workplace safety issues may be made anonymously if the employee wishes. All reports can be made without fear of reprisal.

Each employee is expected to obey safety rules and to exercise caution in all work activities. Employees must comply with all occupational safety and health standards and regulations established by the Occupational Safety and Health Act and state and local regulations. Employees must immediately report any unsafe condition to the appropriate supervisor and/or your ADP TotalSource Human Resources professional. Employees who violate safety standards, who cause hazardous or dangerous situations, or who fail to report or, where appropriate, remedy such situations, may be subject to disciplinary action, up to and including suspension and/or termination of employment.

The following is a list of general safety rules:

- Operate only machines or equipment that you have been trained to operate or authorized to operate by the principal. Do not operate any machinery if you are taking prescription drugs (or controlled substances) that may impair your mental or motor abilities
- Wear protective gloves when dealing with bodily fluids or with a student who is bleeding.
- Dress safely and appropriately
- Immediately report all unsafe or hazardous conditions and unsafe acts to the principal.

- Keep classroom clean and orderly at all times
- Immediately report all accidents and injuries the same day, no matter how minor to your principal
- All non-emergency treatment for accidents must be authorized by your principal
- Get assistance for any heavy loads
- Do not engage in any horseplay and do not distract others while working
- You must inform your principal if you are taking prescription drugs that may impair your mental or motor abilities; you need not inform your principal as to the condition requiring you to take said medication
- Wear seat belts at all times in school vehicles or when driving your own vehicle on school business

If you believe that you are being exposed to a known or suspected hazard when working with toxic chemicals or substances, you have a right under the Hazard Communications Law to know about such hazards through Material Safety Data Sheets (MSDS). Your supervisor will review the MSDS with you. If your supervisor does not have this information, your supervisor will contact ADP TotalSource's Risk Management Department. In addition, you will receive information on what hazardous substances are in the work area and regular training on the adverse effects of each toxic substance with which you come into contact in the workplace. You will be protected against discipline or termination that results from exercising employee rights under the law.

All employees shall have appropriate training on procedures to protect them from blood borne pathogens, including universal precautions; and have understanding on the use of personal protective equipment. Universal precautions shall be observed to prevent contact with blood or other potentially infectious materials. Under circumstances in which differentiation between body fluid types is difficult or impossible, all both fluids shall be considered potentially infectious. (OSHA 1910.1030)

Safety training should be conducted at your facilities on the following topics:

- Blood borne pathogens
- Personal Protective Equipment
- Hazardous Communication Program
- Kitchen Safety
- Safe Lifting
- Slips, Trips & Falls

If you have not been offered the opportunity for safety training, it is your responsibility to notify your principal to receive such training.

In the case of accidents that result in injury, regardless of how insignificant the injury may appear, employees should immediately notify the Safety Officer or the appropriate supervisor. Such reports are necessary to comply with laws and initiate insurance and workers' compensation benefits procedures.

5-21. Hiring Relatives/Employee Relationships

A familial relationship among employees can create an actual or at least a potential conflict of interest in the employment setting, especially where one relative supervises another relative. To avoid this problem, the school may refuse to hire or place a relative in a position where the potential for favoritism or conflict exists.

In other cases such as personal relationships where a conflict or the potential for conflict arises, even if there is no supervisory relationship involved, the parties may be separated by reassignment or terminated from employment, at the discretion of The School. Accordingly, all parties to any type of intimate personal relationship must inform management.

If two employees marry, become related, or enter into an intimate relationship, they may not remain in a reporting relationship or in positions where one individual may affect the compensation or other terms or conditions of employment of the other individual. The School generally will attempt to identify other available positions, but if no alternate position is available, The School retains the right to decide which employee will remain with The School.

For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

5-22. Employee-Student Relationships

All personnel are strictly prohibited from engaging in unacceptable relationships and/or communications with students. This includes, but is not limited to the following: dating, any form of sexual touching or behavior, making sexual, indecent or illegal proposals, gestures or comments, and/or demonstrating any other behavior which gives an appearance of impropriety.

If any staff member is aware of another staff member conducting inappropriate behavior with a student, he/she must report it to the Administration immediately.

5-23. Employee Dress and Personal Appearance

Dress, grooming, and personal cleanliness standards contribute to the morale of all employees and affect the business image The School presents to customers and visitors.

During business hours or when representing The School, you are expected to present a clean, neat, and tasteful appearance. You should dress and groom yourself according to the requirements of your position and accepted social standards. This is particularly true if your job involves dealing with customers or visitors in person.

Your supervisor or department head is responsible for establishing a reasonable dress code appropriate to the job you perform. If your supervisor feels your personal appearance is inappropriate, you may be asked to leave the workplace until you are properly dressed or groomed. Under such circumstance, you will not be compensated for the time away from work. Consult your supervisor if you have questions as to what constitutes appropriate appearance. Where necessary, a reasonable accommodation may be made for a person with a disability.

Without unduly restricting individual tastes, the following personal appearance guidelines should be followed:

- School provided shirts must be worn.
- Shoes must provide safe, secure footing, and offer protection against hazards.
- Canvas or athletic type shoes are not appropriate professional attire.
- Tank tops, tube or halter tops, or shorts may not be worn under any circumstances.
- Mustaches and beards must be clean, well-trimmed, and neat.
- Hairstyles are expected to be in good taste.
- Unnaturally colored hair and extreme hairstyles, such as spiked hair and shaved heads, do not present an appropriate professional appearance.
- Long hairstyles should be worn with hair pulled back off the face and neck to avoid interfering with job performance.
- Excessive makeup is not permitted.
- Offensive body odor and poor personal hygiene is not professionally acceptable.
- Jewelry should not be functionally restrictive, dangerous to job performance, or excessive.
- Facial jewelry, such as eyebrow rings, nose rings, lip rings, and tongue studs, is not professionally appropriate and must not be worn during business hours.
- Multiple ear piercings (more than one ring in each ear) are not professionally appropriate and must not be worn during business hours.
- Torso body piercings with visible jewelry or jewelry that can be seen through or under clothing must not be worn during business hours.
- Visible excessive tattoos and similar body art must be covered during business hours.

5-24. Publicity/Statements to the Media

All media inquiries regarding the position of The School as to any issues must be referred to the Manager of Human Resources. Only the Manager of Human Resources is authorized to make or approve public statements on behalf of The School. No employees, unless specifically designated by the Manager of Human Resources, are authorized to make those statements on behalf of School. Any employee wishing to write and/or publish an article, paper, or other publication on behalf of The School must first obtain approval from the Manager of Human Resources.

5-25. Operation of Vehicles

All employees authorized to drive School-owned or leased vehicles or personal vehicles in conducting School business must possess a current, valid driver's license and an acceptable driving record. Any change in license status or driving record must be reported to management immediately.

A valid driver's license must be in your possession while operating a vehicle off or on Firm property. It is the responsibility of every employee to drive safely and obey all traffic, vehicle safety, and parking laws or regulations. Drivers must demonstrate safe driving habits at all times.

Firm-owned or leased vehicles may be used only as authorized by management.

Portable Communication Device Use While Driving

Employees who drive on School business must abide by all state or local laws prohibiting or limiting portable communication device (PCD) use, including cell phones or personal digital assistants, while driving. Further, even if use is permitted, employees may choose to refrain from using any PCD while driving. "Use" includes, but is not limited to, talking or listening to another person or sending an electronic or text message via the PCD.

Regardless of the circumstances, including slow or stopped traffic, if any use is permitted while driving, employees should proceed to a safe location off the road and safely stop the vehicle before placing or accepting a call. If acceptance of a call is absolutely necessary while the employee is driving, and permitted by law, the employee must use a hands-free option and advise the caller that he/she is unable to speak at that time and will return the call shortly.

Under no circumstances should employees feel that they need to place themselves at risk to fulfill business needs.

Since this policy does not require any employee to use a PCD while driving, employees who are charged with traffic violations resulting from the use of their PCDs while driving will be solely responsible for all liabilities that result from such actions.

Texting and e-mailing while driving is prohibited in all circumstances.

5-26. Business Travel Expenses

When approved, the actual costs of travel, meals, lodging, and other expenses directly related to accomplishing business travel objectives will be reimbursed by The School. Employees are expected to limit expenses to reasonable amounts.

Employees who are involved in an accident while traveling on business must promptly report the incident to their immediate supervisor. Vehicles owned, leased, or rented by The School may not be used for personal use without prior approval. Car rental insurance is not a reimbursable expense.

When travel is completed, employees should submit completed travel expense reports within 30 days. Reports should be accompanied by receipts for all individual expenses. You should review the form for accuracy of completion, since incomplete forms will only delay your reimbursement.

Employees should contact either their Principal or Human Resource Manager for guidance and assistance on procedures related to travel arrangements, expense reports, reimbursement for specific expenses, or any other business travel issues.

Abuse of this business travel expenses policy, including falsifying expense reports to reflect costs not incurred by the employee, can be grounds for disciplinary action, up to and including termination of employment. 5-27. Employee Discipline

This section is to help you understand what is expected of you with regard to proper behavior, performance, and personal conduct. The purpose of this policy is to state The School's position on administering equitable and consistent discipline for unsatisfactory conduct in the workplace. By complying with these standards you will help to maintain a positive, safe work environment for you and your colleagues.

To address those times when you have not lived up to positive standards, we may provide you with counseling, institute progressive discipline, or terminate your employment if your conduct warrants it. We have the discretion to decide whether counseling, progressive discipline or immediate termination is appropriate. The best disciplinary measure is the one that does not have to be enforced and comes from good leadership and fair supervision at all employment levels.

The School's and ADP TotalSource's own best interest lie in ensuring fair treatment of all employees and in making certain that disciplinary actions are prompt, uniform, and impartial. The major purpose of any disciplinary action is to correct the problem, prevent recurrence, and prepare the employee for satisfactory service in the future.

Although employment is based on mutual consent and both the employee and employer (s) have the right to terminate employment at will, with or without cause or advance notice, The School may use progressive discipline at its discretion.

Disciplinary action may call for any of four steps -- verbal warning, written warning, suspension with or without pay, or termination of employment -- depending on the severity of the problem and the number of occurrences. There may be circumstances when one or more steps are bypassed.

Progressive discipline will be used when your supervisor and/or ADP TotalSource feels it is appropriate. The system of progressive discipline gives you notice of deficiencies in performance and an opportunity to improve. When misconduct occurs, progressive disciplinary action may include but is not limited to the following: counseling and/or verbal warning, written warning, suspension with or without pay, and/or termination.

Depending on the nature and severity of the misconduct as well as whether it has previously occurred, your supervisor and/or an ADP TotalSource Human Resources Professional may investigate your actions. An investigation is designed to obtain all pertinent facts and may include interviewing you and other witnesses, reviewing documents, etc. Your friends, relatives, attorneys or other third parties are not allowed to participate in internal investigations. Failure to cooperate with an internal investigation is grounds for disciplinary action up to and including discharge.

When the investigation is complete, your supervisor and/or an ADP TotalSource Human Resources professional will review the facts and the policies. At that point, ADP TotalSource and/or your supervisor will determine whether you should be disciplined up to and including termination.

The School recognizes that there are certain types of employee problems that are serious enough to justify either a suspension, or, in extreme situations, termination of employment, without going through the usual progressive discipline steps.

By using employee discipline, we hope that most employee problems can be corrected at an early stage, benefiting both the employee and The School.

5-27. Problem Resolution

The School and ADP TotalSource are committed to its employees. Part of this commitment is encouraging an open and frank atmosphere in which any problem, complaint, suggestion, or question receives a timely response from the school's supervisors and management.

The School and ADP TotalSource strive to ensure fair treatment of all employees. Supervisors, managers, and employees are expected to treat each other with mutual respect. Employees are encouraged to offer positive and constructive criticism.

If employees disagree with established rules of conduct, policies, or practices, they can express their concern through the problem resolution procedure. No employee will be penalized, formally or informally, for voicing a complaint with the school in a reasonable, business-like manner, or for using the problem resolution procedure.

If a situation occurs when employees believe that a condition of employment or a decision affecting them is unjust or inequitable, they are encouraged to bring those issues to management's attention using the same procedure described in the Harassment policy.

1. Employee presents problem to immediate supervisor after incident occurs. If supervisor is unavailable or employee believes it would be inappropriate to contact that person, employee may present problem to Human Resource Department or any other member of management.
2. Supervisor responds to problem during discussion or after consulting with appropriate management, when necessary. Supervisor documents discussion.

3. Employee presents problem to Human Resource Department if problem is unresolved.
4. Human Resource Department counsels and advises employee, assists in putting problem in writing, visits with employee's manager(s), if necessary, and directs employee to Area President of ADP TotalSource for review of problem.
5. Employee presents problem to President in writing.
6. Academics reviews and considers problem. President informs employee of decision and forwards copy of written response to Human Resource Department for employee's file. The President has full authority to make any adjustment deemed appropriate to resolve the problem. Not every problem can be resolved to everyone's total satisfaction, but only through understanding and discussion of mutual problems can employees and management develop confidence in each other. This confidence is important to the operation of an efficient and harmonious work environment, and helps to ensure everyone's job security.

5-28. Duties of the Teacher

1. The Teacher shall serve The School in her/his best capacity utilizing her/his best efforts.
2. The Teacher agrees to perform her/his duties with such powers, functions, and responsibilities as are usual and customary to the position, and as set forth by The School in the Employee Handbook.
3. The Teacher agrees to perform additional duties, as prescribed by the Principal.
4. Hours of employment will be determined by the Principal and approved by the Board of Directors of The School. School hours are subject to change, but will not exceed 8 hours per day. The Teacher will be notified if such change becomes necessary.
5. The Teacher agrees to follow the dress code prescribed by The School, and wear any designated uniform, as established in the Employee Handbook.
6. The Teacher agrees to assist in drop-off and pick-up duties at The School.
7. The Teacher agrees to refrain from using The School's name, for any purpose, without the express permission of the Board of Directors.

5-29. Life-Threatening Illnesses in the Workplace

Employees with life-threatening illnesses, such as cancer, heart disease, and AIDS, often wish to continue their normal pursuits, including work, to the extent allowed by their condition. The School supports these endeavors as long as employees are able to meet acceptable performance standards.

Medical information on individual employees is treated confidentially. The School will take reasonable precautions to protect such information from inappropriate disclosure. Managers and other employees have a responsibility to respect and maintain the confidentiality of employee medical information. Anyone inappropriately disclosing such information is subject to disciplinary action, up to and including termination of employment.

5-30. Recycling

The School supports environmental awareness by encouraging recycling and waste management in its business practices and operating procedures. This support includes a commitment to the purchase, use, and disposal of products and materials in a manner that will best utilize natural resources and minimize any negative impact on the earth's environment.

Special recycling receptacles have been set up to promote the separation and collection of the following recyclable materials at The School:

- Paper
- Corrugated cardboard
- Brown paper bags
- Printer cartridges

The simple act of placing a piece of paper, can, or bottle in a recycling container is the first step in reducing demand on the earth's limited resources. Success of this program depends on active participation by all of us. Employees are encouraged to make a commitment to recycle and be a part of this solution.

The School encourages reducing and, when possible, eliminating the use of disposable products. Source reduction decreases the consumption of valuable resources through such workplace practices as:

- Turn on alarm when leaving the building at night
- Turn down heat / AC when leaving the building at night
- Communication through computer networks with e-mail
- Posting memos for all employees
- Two-sided photocopying
- Routing slips for reports
- Turning off lights when not in use

Whenever possible, employees of The School are encouraged to purchase products for the workplace that contain recycled or easily recyclable materials. Buying recycled products supports recycling and increases the markets for recyclable materials.

By recycling, The School is helping to solve trash disposal and control problems facing all of us today.

5-31. References

The School will respond to reference requests through the Human Resources Department. The School will provide general information concerning the employee such as date of hire, date of termination, and positions held. Requests for reference information must be in writing, and responses will be in writing. Please refer all requests for references to the Human Resources Dept.

Only the Human Resources Department may provide references.

5-32. If You Must Leave Us

Should you decide to leave The School, we ask that you provide your Supervisor with 30 days advance notice of your departure. Your thoughtfulness will be appreciated.

All School property including, but not limited to, keys, security cards, parking passes, laptop computers, fax machines, uniforms, etc. must be returned at separation. Employees also must return all of The School's Confidential Information upon separation. To the extent permitted by law, employees will be required to repay The School (through payroll deduction, if lawful) for any lost or damaged School property.

Individuals who are not returning for the following school year (regardless of whether it was the employee's decision to resign or whether The School did not extend an invitation to return) will have their active benefits terminated on the last day of the month in which they last worked. Refer to the Benefits Continuation (COBRA) policy for more information.

As noted previously, all employees are employed at-will and nothing in this handbook changes that status.

5-33. Exit Interview

Employees who resign are requested to participate in an exit interview with Human Resources, if possible.

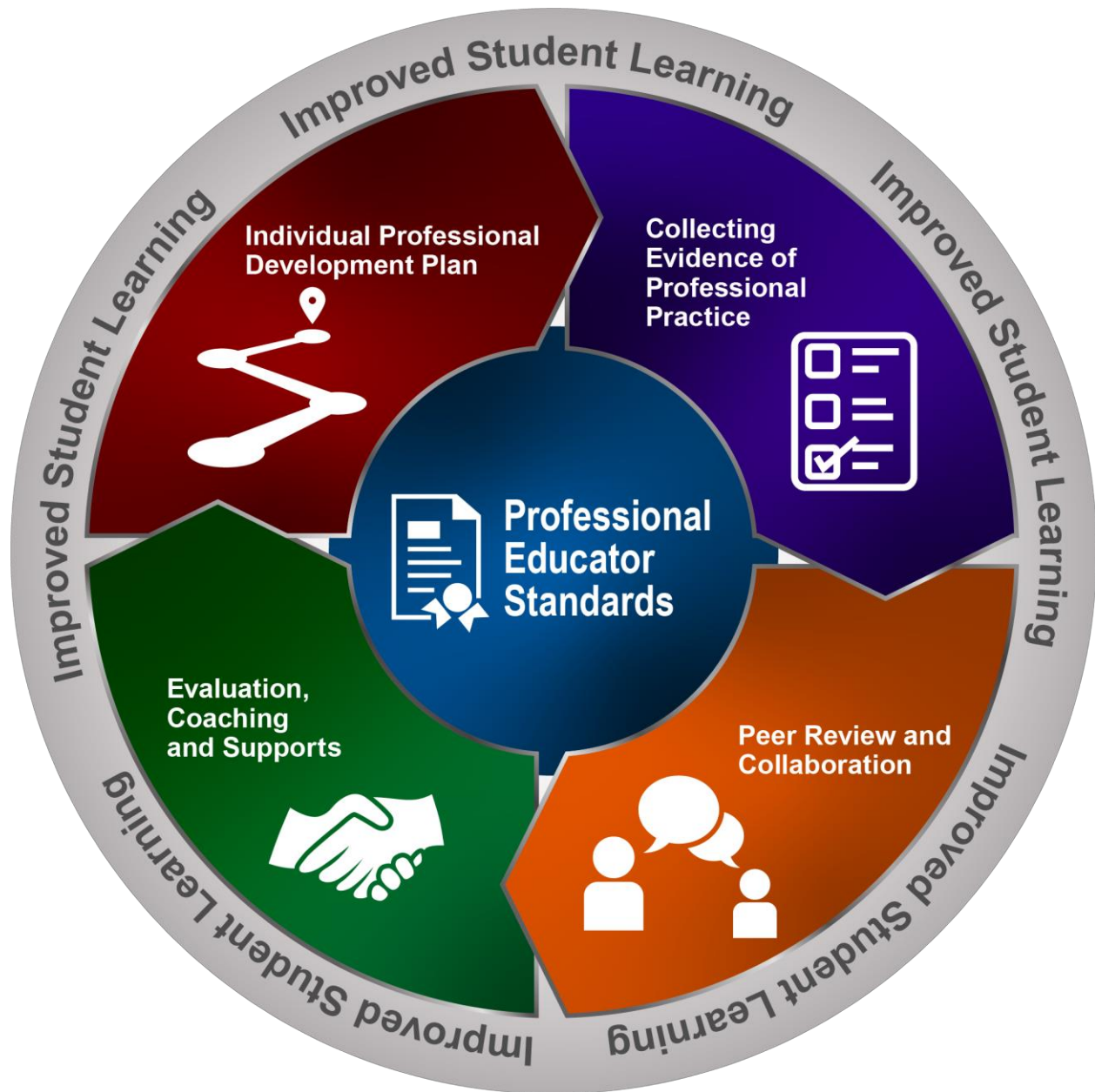
5-34. A Few Closing Words

This handbook is intended to give you a broad summary of things you should know about the school. The information in this handbook is general in nature and, should questions arise, any member of management should be consulted for complete details. While we intend to continue the policies, rules and benefits described in this handbook, The School, in its sole discretion, may always amend, add to, delete from or modify the provisions of this handbook and/or change its interpretation of any provision set forth in this handbook. Please do not hesitate to speak to management if you have any questions about The School or its personnel policies and practices.

Sample

The Iowa Model Educator Evaluation System

User Guide 2021-2022



State of Iowa
Department of Education
Grimes State Office Building
400 E. 14th Street
Des Moines, IA 50319-0146

State Board of Education

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Bettie Bolar, Vice President, Marshalltown
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of Education

Division of Learning Results and Programs

Amy J. Williamson, Deputy Director

Bureau of School Improvement

Janell Brandhorst, Chief
Matt Ludwig, Program Consultant

It is the policy of the Iowa Department of Education not to discriminate on the basis of race, creed, color, sexual orientation, gender identity, national origin, sex, disability, religion, age, political party affiliation, or actual or potential parental, family or marital status in its programs, activities, or employment practices as required by the Iowa Code sections 216.9 and 256.10(2), Titles VI and VII of the Civil Rights Act of 1964 (42 U.S.C. § 2000d and 2000e), the Equal Pay Act of 1973 (29 U.S.C. § 206, et seq.), Title IX (Educational Amendments, 20 U.S.C. §§ 1681 – 1688), Section 504 (Rehabilitation Act of 1973, 29 U.S.C. § 794), and the Americans with Disabilities Act (42 U.S.C. § 12101, et seq.). If you have questions or complaints related to compliance with this policy by the Iowa Department of Education, please contact the legal counsel for the Iowa Department of Education, Grimes State Office Building, 400 E. 14th Street, Des Moines, IA 50319-0146, telephone number: 515-281-5295, or the Director of the Office for Civil Rights, U.S. Department of Education, Citigroup Center, 500 W. Madison Street, Suite 1475, Chicago, IL 60661-4544, telephone number: 312-730-1560, FAX number: 312-730-1576, TDD number: 877-521-2172, email: OCR.Chicago@ed.gov.

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The Iowa Model Educator Evaluation User Guide Purpose

The Iowa Model Educator Evaluation User Guide serves as a framework required from the Iowa Department of Education in accordance with Iowa Code 284.3(2a). This document is intended to provide the information needed for implementing teacher and administrator evaluation aligned to Iowa Code. **The document will be updated as legislation, rules, or forms change** so refer to the online document for the most accurate, up-to-date information.

Introduction

Educating students is a complex activity requiring a set of knowledge, skills, and dispositions. An effective Iowa educator seeks to develop, support, and engage all students in learning and achieving at high levels. Iowa expects that effective educators will not only ensure student academic growth, but they will also:

- Provide all students opportunities to learn in ways that will prepare them to be college and career ready when they graduate from high school,
- Insure all students reach high and rigorous academic standards, and
- Engage in ongoing goal-setting and professional development as outlined in the Iowa Professional Development Model.

History of Professional Educator Standards & Evaluation

Iowa's educator quality efforts are meant to promote student achievement and enhance an educator's practice. The history of professional educator standards and evaluation in Iowa stems back to the late 1990's. In 2001 Iowa's educational system adopted the Iowa Teaching Standards and Criteria, a Model Framework for Designing a Local Staff Evaluation System, and a beginning teacher's mentoring and induction program. Then in 2007, educational leaders were introduced to the Iowa Standards for School Leaders, a model for school leadership evaluation, and a beginning administrator mentoring and induction program. In an effort to support the use of these standards, frameworks, and a program, the Department of Education, Area Education Agencies, and other educational organizations designed and implemented learning opportunities for teachers and leaders.

Iowa Teaching Standards & Criteria

The Iowa Teaching Standards and Criteria (ITSC) were introduced to Iowa educators in 2001. The standards and criteria provide a foundation for a summative or comprehensive evaluation and the ongoing professional growth of teachers. These are the Iowa Teaching Standards (Iowa Code 284.3(1)):

1. Demonstrates ability to enhance academic performance and support for and implementation of the school district's student achievement goals.
2. Demonstrates competence in content knowledge appropriate to the teaching position.
3. Demonstrates competence in planning and preparing for instruction.
4. Uses strategies to deliver instruction that meets the multiple learning needs of students.
5. Uses a variety of methods to monitor student learning.
6. Demonstrates competence in classroom management.
7. Engages in professional growth.
8. Fulfills professional responsibilities established by the school district.

In 2007, alternative criteria for each of the eight teaching standards were developed to support Area Education Agency staff members who meet the definition of teacher (Iowa Code 284.2(11)).

Iowa Standards for School Leaders

Beginning in 2008, the Iowa Standards for School Leaders (ISSL) were integrated into Iowa's educator quality system. Just like the Iowa Teaching Standards, the leadership standards provide the basis for the yearly evaluation and the ongoing professional growth of school leaders. The Iowa Standards for School Leaders (281—IAC 83.10) are:

1. Shared Vision
2. Culture of Learning
3. Management
4. Family and Community
5. Ethics
6. Societal Context

Iowa Evaluator Approval Training

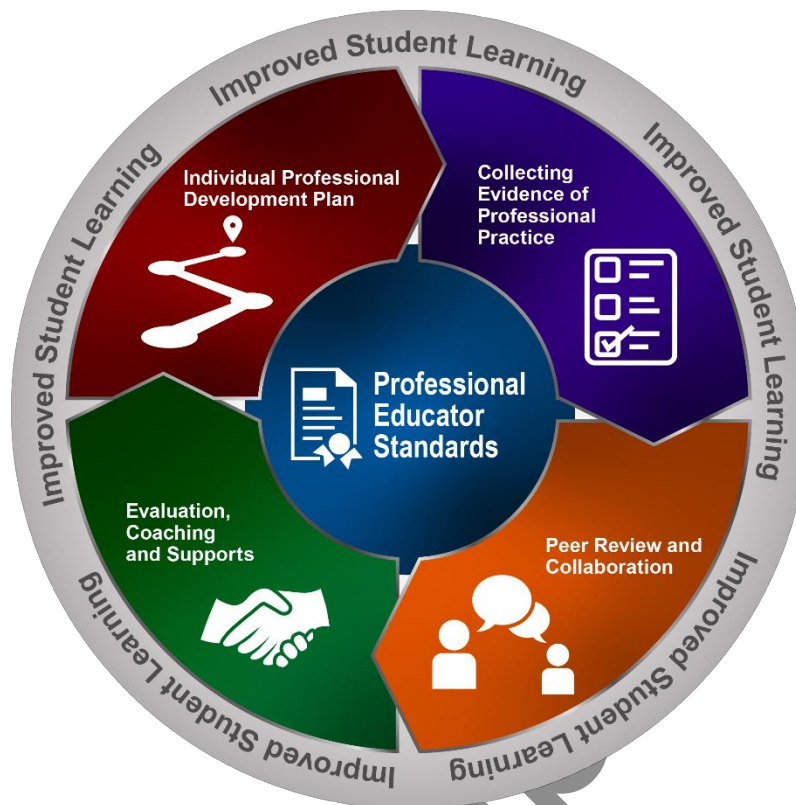
In 2002, the Iowa Evaluator Approval Training (Iowa Code 284.10) required for principals and superintendents, needing to obtain an evaluator license as part of an administrative license requirement in accordance with the Board of Educational Examiners (282—IAC 19.7). The educator quality legislation, first in 2002, centered on the Iowa Teaching Standards and the evaluation of teachers – beginning and career. In 2007, Iowa Standards for School Leaders and the evaluation of school administrators (Iowa Code 284A) took center stage. As a collaborative effort amongst multiple stakeholders – the Iowa Department of Education, the Board of Educational Examiners, local school districts, area education agencies, institutions of higher education, School Administrators of Iowa, Iowa Association of School Boards, and other educational agencies/organizations – Iowa Evaluator Training Program was developed and focused on improving teaching and learning through quality leadership.

The collaborative efforts have resulted in multiple learning opportunities focused on improving an educational evaluator's knowledge and skills regarding professional educator standards, observations, evidence, coaching, feedback, and professional development. In the 2002-2003 school year, the creators of evaluator training program unveiled Level I training across the state with a focus on:

- a. Iowa Teacher Quality legislation (Iowa Code 284)
- b. Iowa Teaching Standards
- c. Coaching and feedback
- d. Observational techniques
- e. Procedures for beginning and career teachers

By 2007, the Iowa Evaluator Approval Training Program continued to evolve with additional trainings focused on the evaluation of teachers (Level II: Evaluation of Teachers) and school administrators (Level II: Evaluation of Administrators). With some administrators being prepared outside of Iowa and seeking school administrative positions in Iowa districts, the department developed an online option, iEvaluate, initially with School Administrators of Iowa and then in conjunction with AEA Learning Online. Then in 2012, the department and its educational partners created and supported additional evaluator approval training for evaluators: Assessing Academic Rigor and Fierce Conversations. Currently, the department is accepting evaluator training proposals that align with regulations specified in IAC 83.5 and collaborating with other partners to define other evaluator approval training structures.

The Educator Evaluation Model



The figure above represents the Educator Evaluation Model. The development of the model was guided by these characteristics:

- Ensuring that there are quality educators in every school building and classroom
- Focusing on improved student learning
- Providing meaningful and actionable feedback that improves the educator's performance.
- Fostering an educator evaluation system that exemplifies continuous growth and development.
- Using multiple data points to inform and support the educator's practice.
- Developing and implementing an educator evaluation system that engages stakeholders in a collaborative process.

The implementation of the Educator Evaluation Model should be understood as an ongoing process rather than a single event. Gathering evidence related to the professional educator standards, reflecting on an educator's practice, collaborating with colleagues to improve practice and student learning, and providing and using feedback are attributes of continuous improvement in a quality educator evaluation system.

Iowa educators must be evaluated on the professional educator standards (ITSC, ITS and AEA criteria, or the ISSL) supported by multiple measures. Accredited local school districts or Area Education Agencies may include additional standards and criteria, but eliminating the state approved professional educator standards is not allowed. The Iowa Model Educator Evaluation System supports gathering evidence through observation; engaging in structured conversations (pre-, post-, and individual professional development conferences); developing and supporting short- and/or long-term goals;

building and sustaining a collaborative culture through ongoing peer reviews and supports from a teacher leader; and focusing on individual, school-level, and/or system-level professional growth.

Sample



Teacher Evaluation

Sample

Iowa Teaching Standards and Model Criteria

The Iowa Teaching Standards appear in Iowa Code 284.3(1). The Model Criteria were developed by the Iowa Department of Education in collaboration with various stakeholders and adopted by State Board of Education on May 10, 2002. The criteria are specifically addressed in IAC 281—83, Teacher and Administrator Quality Programs. A change to the criteria was adopted by the State Board of Education on May 13, 2010, to strengthen Iowa's commitment to using student performance data to evaluate Iowa teachers.

Standard 1: Demonstrates ability to enhance academic performance and support for implementation of the school district's student achievement goals.

The teacher:

- a. Provides multiple forms of evidence of student learning and growth to students, families, and staff.
- b. Implements strategies supporting student, building, and district goals.
- c. Uses student performance data as a guide for decision making.
- d. Accepts and demonstrates responsibility for creating a classroom culture that supports the learning of every student.
- e. Creates an environment of mutual respect, rapport, and fairness.
- f. Participates in and contributes to a school culture that focuses on improved student learning.
- g. Communicates with students, families, colleagues, and communities effectively and accurately.

Standard 2: Demonstrates competence in content knowledge appropriate to the teaching position.

The teacher:

- a. Understands and uses key concepts, underlying themes, relationships, and different perspectives related to the content area.
- b. Uses knowledge of student development to make learning experiences in the content area meaningful and accessible for every student.
- c. Relates ideas and information within and across content areas.
- d. Understands and uses instructional strategies that are appropriate to the content area.

Standard 3: Demonstrates competence in planning and preparing for instruction.

The teacher:

- a. Uses student achievement data, local standards, and the district curriculum in planning instruction.
- b. Sets and communicates high expectations for social, behavioral, and academic success of all students.
- c. Uses student's developmental needs, backgrounds, and interests in planning for instruction.
- d. Selects strategies to engage all students in learning.
- e. Uses available resources, including technologies, in the development and sequencing of instruction.

Standard 4: Uses strategies to deliver instruction that meets the multiple learning needs of students.

The teacher:

- a. Aligns classroom instruction with local standards and district curriculum.
- b. Uses research-based instructional strategies that address the full range of cognitive levels.

- c. Demonstrates flexibility and responsiveness in adjusting instruction to meet student needs.
- d. Engages students in varied experiences that meet diverse needs and promote social, emotional, and academic growth.
- e. Connects students' prior knowledge, life experiences, and interests in the instructional process.
- f. Uses available resources, including technologies, in the delivery of instruction.

Standard 5: Uses a variety of methods to monitor student learning.

The teacher:

- a. Aligns classroom assessment with instruction.
- b. Communicates assessment criteria and standards to all students and parents.
- c. Understands and uses the results of multiple assessments to guide planning and instruction.
- d. Guides students in goal setting and assessing their own learning.
- e. Provides substantive, timely, and constructive feedback to students and parents.
- f. Works with other staff and building and district leadership in analysis of student progress.

Standard 6: Demonstrates competence in classroom management.

The teacher:

- a. Creates a learning community that encourages positive social interaction, active engagement, and self-regulation for every student.
- b. Establishes, communicates, models, and maintains standards of responsible student behavior.
- c. Develops and implements classroom procedures and routines that support high expectations for student learning.
- d. Uses instructional time effectively to maximize student achievement.
- e. Creates a safe and purposeful learning environment.

Standard 7: Engages in professional growth.

The teacher:

- a. Demonstrates habits and skills of continuous inquiry and learning.
- b. Works collaboratively to improve professional practice and student learning.
- c. Applies research, knowledge, and skills from professional development opportunities to improve practice.
- d. Establishes and implements professional development plans based upon the teacher's needs aligned to the Iowa Teaching Standards and district/building student achievement goals.
- e. Provides an analysis of student learning and growth based on teacher created tests and authentic measures as well as standardized and district-wide tests.

Standard 8: Fulfills professional responsibilities established by the school district.

The teacher:

- a. Adheres to board policies, district procedures, and contractual obligations.
- b. Demonstrates professional and ethical conduct as defined by state law and district policy.
- c. Contributes to efforts to achieve district and building goals.
- d. Demonstrates an understanding of and respect for all learners and staff.
- e. Collaborates with students, families, colleagues, and communities to enhance student learning.

Model Descriptors and Evidence

The model descriptors are intended to depict behaviors of a career teacher that support the criteria for the Iowa Teaching Standards (IAC 281—83.4). The descriptors are examples that may be used to guide conversations during the evaluation process.

The local districts, including their Teacher Quality Committee (Iowa Code 284.4(1b); IAC 281—83.7), are responsible for determining evidence to support the Iowa Teaching Standards and Criteria. Evidence is not needed for each of the 42 criteria. It is the presence of quality evidence under a standard that should determine if a teacher meets a particular Iowa Teaching Standard. The determination of quality is defined by the licensed Iowa evaluator, the professional conversation between the evaluator and the teacher about the evidence, and the district guidelines for evaluation set by the Teacher Quality Committee. Evidence used to show competence in one standard and criteria can and should be used for showing competence in other standards and criteria. The State of Iowa does not require a teacher (beginning or career) to create a portfolio of evidence. It is a local district's responsibility to determine how evidence will be organized, shared, and if certain pieces of evidence are required for the district's teachers.

Standard 1: Demonstrates ability to enhance academic performance and support for implementation of the school district's student achievement goals.

Criteria	Descriptor	Evidence
a. The teacher provides evidence of student learning to students, families, and staff.	The teacher documents student learning with meaningful measures using data that is understandable. Shares individual and classroom goals and results with students, families, and staff members. The teacher uses multiple artifacts, including achievement trends for local standards and benchmarks, to document and provide evidence of student learning to students, families, and staff members. The teacher plans on going communications with parents, families, and colleagues, so his/her teacher learning objectives have the greatest likelihood of serving the students' best interests.	<ol style="list-style-type: none">1. Follows Comprehensive School Improvement Plans, School Improvement Plans, Individual Education Plans, and 504 Plans2. Observation notes3. Individual Professional Development Plans4. Volunteers for district committees to support academic performance5. Creates lesson to meet curriculum standards6. Grade level and/or building SMART goal data7. Data review notes8. Communications sent to families

Criteria	Descriptor	Evidence
b. The teacher implements strategies supporting student, building, and district goals.	The teacher knows the short and long-range building and district goals for student learning and implements classroom instructional strategies that clearly align with these goals. The teacher effectively communicates these goals and accomplishments to various constituents including students, families, and colleagues.	<ol style="list-style-type: none"> 1. Class test results 2. Lesson plans 3. Team meeting minutes 4. Differentiated lessons 5. Documentation of alignment of instruction to Individual Education Plan accommodations, modifications, and goals 6. Running records and other data gathering evidence 7. Show concurrent lesson plans 8. Evidence of goal setting with students and communication with families
c. The teacher uses student performance data as a guide for decision making.	The teacher uses performance data collected through formal and informal measures to profile student learning. The teacher analyzes data from various formative, screening, diagnostic and summative assessments to make decisions regarding student progress and bases curricular and instructional decisions on student performance data. The teacher also uses individual student's performance data to make decisions about individual student needs.	<ol style="list-style-type: none"> 1. Modification and accommodation plans 2. Multiple assessments 3. Formative assessment data collection and organization tools 4. Differentiated lesson plans for varying abilities 5. Small group targeted lesson plans and learning goals 6. Data review session and resulting lesson plans aligned to student needs 7. Collection of observations and artifacts for GOLD assessment, including observations from para-educators and families
d. The teacher accepts and demonstrates responsibility for creating a classroom culture that supports the learning of every student.	The teacher develops and communicates high expectations to motivate students to make positive choices regarding their own learning. The teacher acts in accordance with the belief that all students can learn. The teacher encourages students to work cooperatively as	<ol style="list-style-type: none"> 1. Class rules and expectations posted 2. Community building activities 3. Observation notes 4. Bulletin boards 5. Lesson plans 6. Collaboration notes with support teachers – interventionist, special education teachers, etc.

Criteria	Descriptor	Evidence
	well as independently and includes students in decision making when appropriate.	<ul style="list-style-type: none"> 7. Video evidence of cooperative learning structures 8. Visual supports for students (schedules, expectations, etc.) 9. Evidence of classroom supports for students needing to take a break (e.g., location in room, posted procedures, break box, etc.) 10. Social contract or class agreement
e. The teacher creates an environment of mutual respect, rapport, and fairness.	The teacher demonstrates clear expectations of developing responsible, self-directed learners and model acceptance of all students based on awareness of individual student differences. The teacher facilitates ways to get students to cooperate with one another and take responsibility for their work.	<ul style="list-style-type: none"> 1. Evidence of cooperative learning structures (e.g., video, lesson plans, anchor charts with sentence frames, roles, procedures, etc.) 2. Adherence to Individual Education Plans and 504 accommodations 3. Community building activities such as morning meeting or class meetings 4. Social contracts or class agreements 5. Materials and literature that help to challenge stereotypes and biases with various differences (disabilities, gender, race, etc.) 6. Evidence of restorative justice within classroom practice 7. Evidence of trauma informed classroom practices.
f. Participates in and contributes to a school culture that focuses on improved student learning.	The teacher develops strategies with colleagues who share responsibility for a student(s) to increase the likelihood of success and engages in active inquiry with colleagues about the school's fulfillment of instructional goals. The teacher provides opportunities for families and community members to take an active role in the classroom, the school, and the school district.	<ul style="list-style-type: none"> 1. Action steps – teacher actions 2. Notes from child study, problem solving, and instructional decision making meetings 3. E-mail examples 4. Classroom newsletter 5. Phone call log 6. Thank you notes received 7. Professional Learning Community meeting notes

Criteria	Descriptor	Evidence
	The teacher accepts personal responsibility for nurturing the school as a community of learners.	8. Data review meeting agenda and/or notes reflecting collaboration
g. The teacher communicates with students, families, colleagues, and communities effectively and accurately.	The teacher demonstrates professionalism and self-confidence in routine circumstances and eases stressful situations when they occur. The teacher uses appropriate spelling, grammar, mechanics and style and varies vocal cues, rate, and volume. The teacher demonstrates and leads quality discussions.	<ol style="list-style-type: none"> 1. Copies of handouts 2. Videos used, CD's 3. Notes on lesson plans 4. Log of area education agency involvement 5. Observation notes 6. Copies of family night communications and presentations 7. Copies of family newsletters or links to webpages

Standard 2: Demonstrates competence in content knowledge appropriate to the teaching position.

Criteria	Descriptor	Evidence
a. The teacher understands and uses key concepts, underlying themes, relationship and different perspectives related to the content area.	The teacher knows the content that supports common core state standards in the grade level courses that the teacher is assigned and uses an integrative approach for content that supports those standards. There is incorporation of accurate content knowledge into instruction aligned with the common core state standards. The teacher locates and uses multiple resources to expand subject matter beyond manuals, texts, and curriculum guides.	<ol style="list-style-type: none"> 1. Lesson plans 2. Unit plans that include multiple cross-curricular resources 3. Evidence of supporting common core state standards work in district committees and Professional Learning Communities 4. Notes planning meeting 5. Observation notes
b. The teacher uses knowledge of student development to make learning experiences in the content area meaningful and accessible for every student.	The teacher knows the content appropriate to the learner needs and selects meaningful instructional objectives aligned with those students' learning needs. The teacher provides	<ol style="list-style-type: none"> 1. Assessments 2. Evaluator observation notes 3. Lesson plans 4. Differentiated student work samples

Criteria	Descriptor	Evidence
	significant, challenging, varied, and appropriate learning goals designed to meet the learning needs of each student. The teacher knows when it is appropriate to use adaptations and accommodations to meet individual student needs, including curriculum compacting, enrichment, and acceleration. The teacher uses appropriate assessment techniques to assess the learning experiences provided in the classroom. Technology is integrated to achieve student learning targets.	<ul style="list-style-type: none"> 5. Proficiency scales with embedded learning targets 6. "I can" statements with success criteria for student learning 7. Standards-based assessments that give students opportunity to demonstrate performance at all levels on a proficiency scale
c. The teacher relates ideas and information within and across content.	The teacher organizes curricular materials to facilitate understanding of central themes, concepts, and skills. The teacher knows the content taught at grade levels below and above the current grade level taught and interrelates ideas and information within and across curricular areas to assist or facilitate student understanding. The teacher uses multiple questioning techniques for student inquiry within and across disciplines and knows when appropriate technology can be used to assist student application of knowledge and skills across content areas.	<ul style="list-style-type: none"> 1. Integrated and/or inquiry unit plans 2. Lesson plans that include possible questioning sequences 3. Video of lessons that include evidence of questions that progress in complexity 4. Vertical Professional Learning Community discussions
d. The teacher understands and uses instructional strategies that are appropriate to the content area.	The teacher knows when and how a variety of instructional strategies can be used in the content area to improve student learning and uses those strategies as appropriate. The teacher also knows which strategies are developmentally appropriate for various groups of students and applies that knowledge as needed. The teacher integrates the use of technology as an instructional strategy when it	<ul style="list-style-type: none"> 1. Lesson plans that includes evidence of instructional strategies 2. Student work samples that includes the use of technology

Criteria	Descriptor	Evidence
	supports and enhances learning for the content area.	

Standard 3: Demonstrates competence in planning and preparing for instruction.

Criteria	Descriptor	Evidence
a. The teacher uses student achievement data, local standards, and the district curriculum in planning for instruction.	The teacher designs and uses a variety of instructional strategies and classroom materials that align with local content standards, benchmarks, and district curricular expectations. The teacher uses these local content standards and benchmarks to determine what students should know and be able to do. The teacher analyzes individual student and classroom achievement data to determine the sequencing of and adjustments to instructions.	<ol style="list-style-type: none"> 1. Lesson plans documenting the use of student data to drive instruction and student learning outcomes 2. District-wide assessment results 3. Classroom/grade-level formative and summative assessments 4. Photos of student successes 5. Survey results of student responses to classroom climate 6. Observation notes, videos, websites, etc. 7. Evidence of Professional Learning Community work
b. The teacher sets and communicates high expectations for social, behavioral, and academic success of all students.	The teacher establishes classroom goals for social, behavioral and academic success and develops classroom routines to support these goals. The teacher provides timely feedback to students and routinely assesses their progress toward these goals.	<ol style="list-style-type: none"> 1. Family letters or surveys 2. Lesson plans 3. Variety of project choices for a lesson 4. Classroom expectations (Positive Behavioral Interventions and Supports) 5. Samples of feedback forms
c. The teacher uses student developmental needs, background, and interests in planning for instruction.	The teacher seeks and collects information to understand students' needs and interests for use in planning and designs and uses lessons and units that provide for varied student learning needs. The teacher incorporates multiple levels	<ol style="list-style-type: none"> 1. Observable teaching techniques- cooperative learning, projects, presentations, etc. 2. Copies of lesson plans reflecting differentiation of instruction 3. Student evaluation of completed project

Criteria	Descriptor	Evidence
	of thinking and conceptualization into planning for instruction and incorporates multiple mechanisms for students to attain knowledge and skills in varied modalities.	<ul style="list-style-type: none"> 4. Photos and/or video of students engaged in learning activities 5. Observation notes 6. Student interest surveys
d. The teacher selects strategies to engage all students in learning.	The teacher knows or actively seeks instructional strategies that produce increased student learning. Lesson plans incorporate a variety of effective instructional strategies, facilitation techniques, and classroom activities that actively engage students in learning. The teacher organizes content in a manner that facilitates each student's construction of his or her learning and incorporates inquiry methods to encourage critical and creative thinking. The teacher differentiates instruction to meet student learning needs based on the assessment of student progress.	<ul style="list-style-type: none"> 1. Observation of integrating technology to advance student learning goals 2. Evidence of technology-based lesson plans 3. Technology usage that supports student engagement in a learning environment 4. Examples of strategies used within lesson plans 5. Observation notes 6. Bibliography of resources used in planning 7. Photo documentation 8. Field trip summaries 9. Observation of community speaker utilization
e. The teacher uses resources, including technologies, in the development and sequencing of instruction.	The teacher integrates resources in developing and sequencing instruction that are appropriate to the content, to curriculum alignment, and to students' prior learning. The teacher uses challenging resources that are mentally, visually, aurally, and kinesthetically stimulating and integrates the use of technology as a curricular support when appropriate. The teacher assesses students' use of technological resources before integrating into student expectations.	<ul style="list-style-type: none"> 1. Teacher to student communication tools (i.e., Google Classroom, Blackboard, etc.) 2. Bibliography of online resources used with students 3. Content integration using technology 4. Lesson plans outlining the resources that will be utilized during instruction 5. Potential planning protocols from working with an instructional coach

Standard 4: Uses strategies to deliver instruction that meets the multiple learning needs of students.

Criteria	Descriptor	Evidence
a. The teacher uses research-based instructional strategies that address the full range of cognitive levels.	The teacher incorporates differentiated instructional strategies that are effective for students at varied cognitive levels and is able to adjust strategies during instruction to meet individual student learning needs. The teacher uses questioning techniques that foster classroom discussion to increase student knowledge and skills and monitors students' learning.	<ol style="list-style-type: none"> 1. Observable use of accommodation and modification 2. Copy of instructional decision making plans 3. Student work showing evidence of positive results 4. 504, IEP accommodation plans 5. Use of various strategies for the same content
b. The teacher aligns classroom instruction with local standards and district curriculum.	The teacher works collaboratively to support the common core state standards and performance assessments for student achievement. The teacher implements classroom instructional strategies that align with the common core state standards across all content areas.	<ol style="list-style-type: none"> 1. Examples of student work 2. Examples of research reviewed and used 3. Teacher self- assessment 4. Workshop implementation 5. Logs and evaluator observation notes 6. Lesson plans 7. Evidence of Professional Learning Communities – logs, instructional coach collaboration, etc.
c. The teacher demonstrates flexibility and responsiveness in adjusting instruction to meet student needs.	The teacher uses appropriate curriculum, instruction, and assessments to accommodate individual needs and uses analysis of student learning before, during, and after instruction to make instructional decisions. The teacher adjusts instructional strategies as needed to meet student learning needs for intervention, differentiation, and extension for standards and benchmarks attainment. The instruction is paced to optimize effective learning by all students, provide clear directions, provide timely feedback and use spontaneous events as a teaching and learning opportunity. Evidence of formative	<ol style="list-style-type: none"> 1. Student work samples 2. Photos of students engaged in their work 3. Surveys results from students 4. Evidence of teacher being involved in a coaching cycle 5. Sample of formative assessments and lesson plans showing change based on the assessments 6. Interventions – individual and small group and class-wide 7. Lesson plans 8. Observation notes

Criteria	Descriptor	Evidence
	assessment to gauge student learning and prepare adjustments.	
d. The teacher engages students in varied experiences that meet diverse needs and promote social, emotional, and academic growth.	The teacher uses individual, cooperative, and whole class instruction to promote maximum student participation and uses instructional materials that are mentally engaging to the student. The teacher invites outside resources, or uses alternative spaces to engage students.	<ol style="list-style-type: none"> 1. Student interview data 2. Providing social activities 3. Parent input about student 4. Student work samples 5. Lessons with choices for student 6. Evidence of the use of outside-the-classroom spaces and field trips 7. Guest speakers
e. The teacher connects students' prior knowledge, life experiences, and interests in the instructional process.	The teacher draws on the prior knowledge, life experience, interest and language of students during instruction. They identify for learners the connections and potential applications of curriculum to real-life issues and problems. The teacher provides opportunities for the student to identify connections between curriculum and real-life problems. The teacher guides discussion and assigns in-class and homework tasks that provide students with links or transition to life experiences and interests.	<ol style="list-style-type: none"> 1. Guest speakers 2. Lesson plans 3. Student research projects with a variety of presentation formats being observed 4. Website developed by teacher and/or students
f. The teacher uses available resources, including technologies, in the delivery of instruction.	The teacher provides classroom settings and activities that are mentally, visually, aurally, and kinesthetically stimulating and uses resources that are appropriate to the content and to students' prior learning. The teacher encourages students' use of technological resources and integrates the use of technology as an instructional support when appropriate.	<ol style="list-style-type: none"> 1. Use of manipulatives and/or tablets and/or laptops 2. List of website/tutorials used in class 3. Teacher-created website 4. Administers learning management system, like Google Classroom

Standard 5: Uses a variety of methods to monitor student learning.

Criteria	Descriptor	Evidence
a. The teacher aligns classroom assessment with instruction.	The teacher uses instructional strategies that are effective for students at varied cognitive levels and is able to adjust strategies during instruction to meet student learning needs. The teacher uses questioning techniques that foster classroom discussion to increase student knowledge and skills and monitors students' learning. The teacher uses formative assessments that support and inform instruction. Instruction prepares students to perform the related assessment.	<ol style="list-style-type: none"> 1. Observable use of accommodation and modification 2. Copy of instructional decision making plans 3. Student work showing evidence of positive results 4. 504, IEP accommodation plans 5. Sample of instruction aligned to assessment 6. Creation of formative assessments by Professional Learning Community
b. The teacher communicates assessment criteria and standards to all students and parents.	The teacher works collaboratively to support the Iowa Core Content Standards and performance assessments for student achievement. The teacher implements classroom instructional strategies that support the achievement the Iowa Core Content Standards. The teacher shares the Iowa Core Content Standards with students and parents.	<ol style="list-style-type: none"> 1. Examples of student work 2. Examples of research reviewed and used 3. Teacher self- assessment 4. Workshop implementation 5. Logs and evaluator observation notes 6. Lesson plans 7. Website developed and maintained by the teacher 8. Photos of classroom posters and other visuals
c. The teacher understands and uses the results of multiple assessments to guide planning and instruction.	The teacher uses appropriate curriculum, instruction, and assessments to accommodate individual needs and uses analysis of student learning before and after instruction to make instructional decisions. The teacher adjusts instructional strategies as needed to meet student learning needs for remediation, differentiation, and extension for Iowa Core Content Standard attainment. The instruction is paced to optimize effective learning by all	<ol style="list-style-type: none"> 1. Student work samples 2. Examples of multiple formative student assessments 3. Examples of student assessment options aligned with the Iowa Core Content Standards 4. Photos of students engaged in their work 5. Surveys results from students 6. Lesson plans 7. Observation notes

Criteria	Descriptor	Evidence
	students, provide clear directions, clarify when students are confused and use spontaneous events as a teaching and learning opportunity. The teacher uses varied dates point, like formative assessments, to assess student progress and guide instructional adjustments.	
d. The teacher guides students in goal setting and assessing their own learning.	The teacher guides students in the use of their achievement data to set goals. The teacher provides tools to assist students in assessing their own learning. The teacher models goal setting for individual student, small group and/or whole class goal setting.	<ol style="list-style-type: none"> 1. Student interview data 2. Providing social activities 3. Parent input about student 4. Student work samples 5. Lessons with choices for student 6. Metacognition practices 7. Samples of individual, small group and/or whole class goals
e. The teacher provides substantive, timely, and constructive feedback to students and parents.	The teacher provides quality feedback using student-friendly language that is clear, concise, and familiar. To ensure learners make further progress the teacher monitors how students act on their feedback and articulate their next steps. Communicates constructive and frequent feedback on student learning to students, parents, and other stakeholders.	<ol style="list-style-type: none"> 1. Examples of verbal student feedback 2. Written responses to student work 3. Samples of student progress reports 4. Samples of behavior charts or daily reports
f. The teacher works with other staff and building and district leadership in analysis of student progress.	The teacher collects valid and reliable student achievement data. The teacher collaborates with building and district leadership to analyze student achievement and progress within a Multi-tiered System of Support approach using data. The teacher works within a Professional Learning Community to create and use formative assessments.	<ol style="list-style-type: none"> 1. Professional Learning Community agenda and minutes 2. Process for monitoring student progress 3. Analysis of formative assessment results

Standard 6: Demonstrates competence in classroom management.

Criteria	Descriptor	Evidence
a. The teacher creates a learning community that encourages positive social interaction, active engagement, and self-regulation for every student.	The teacher creates and communicates clear expectations for individual student interaction, engagement, and self-regulation. Students are taught to become responsible and self-directed, consistent with students' developmental needs. The teacher encourages collaboration and self-reliance and interacts with students in a respectful and appropriate manner and creates a classroom with a climate of respect for all.	<ol style="list-style-type: none"> 1. Expectations posted in classroom 2. My job and/or your job chart posted 3. Photos of agreements posted
b. The teacher establishes, communicates, models, and maintains standards of responsible student behavior.	The teacher clearly communicates guidelines for responsible student behavior and instructs students about behavioral expectations and appropriate social skills. The teacher maintains consistent and clear expectations and accountability and models positive social skills to students while providing opportunities for students to practice those skills.	<ol style="list-style-type: none"> 1. Rules/expectations posted 2. Classroom agenda/calendar posted 3. Classroom contract/constitution posted 4. Elements of first three observable 5. Substitute folder available
c. The teacher develops and implements classroom procedures and routines that support high expectations for student learning.	The teacher consistently implements management techniques that create an engaging learning environment and make behavioral modifications in specific situations to support individual learning needs. The teacher develops and implements schedules, timelines, procedures, and routines to support high expectations for learning.	<ol style="list-style-type: none"> 1. Students on-task – Observable 2. Smooth transitions – Observable 3. Observation notes 4. Posted Procedures and evidence that students understand and demonstrate the procedures
d. The teacher uses instructional time effectively to maximize student achievement.	The teacher develops and implements classroom procedures and routines that optimize learning time. Instructional time is used	<ol style="list-style-type: none"> 1. Student behavior – observable 2. Charts such as my job/your job posted 3. Time audits

Criteria	Descriptor	Evidence
	effectively and productively for maximum student engagement with tasks.	
e. The teacher creates a safe and purposeful learning environment.	The teacher creates a classroom setting that is safe and provides an accessible learning environment for all students. They insist upon fairness and respect as elements in each interpersonal relationship and encourage each student to be self-reflective. The teacher provides learning opportunities for students to become responsible, self-reliant, and collaborative. They create opportunities for students to make decisions appropriate to students' developmental levels.	<ol style="list-style-type: none"> 1. Observation of positive student-teacher interactions 2. Observation of students engaged in the work of learning 3. Classroom posters defining such things as fairness, respect, resilience, etc.

Standard 7: Engages in professional growth.

Criteria	Descriptor	Evidence
a. The teacher demonstrates habits and skills of continuous inquiry and learning.	The teacher actively pursues opportunities for learning embedded in daily experiences and engages in formal learning opportunities to increase his/her repertoire of knowledge and skills. Responsibility is accepted for his/her mental, physical, and social well-being. The teacher routinely reflects on his/her practices. There is a habit of reading current educational journals and other professional literature.	<ol style="list-style-type: none"> 1. Lesson plans showing co-teaching 2. Peer evaluation 3. Evaluator observation of co-teaching 4. Engages productively in Professional Learning Community 5. Shares insights with colleagues in collaborative settings 6. Willingly seeks support as needed 7. Willingly works with an instructional coach/teacher leader
b. The teacher works collaboratively to improve professional practice and student learning.	The teacher collaborates with others to improve their teaching and their students' learning and	<ol style="list-style-type: none"> 1. Innovative research-based lessons – observation notes

Criteria	Descriptor	Evidence
	supports joint efforts for the improvement of instruction. The teacher contributes experience and ideas toward the continuing development of the school/district as a learning community and builds relationships that enable them to become valuable members of the school community. The teacher plans lessons, rehearses strategies, demonstrates strategies, and observes with a mentor and/or peer coaching mentor.	<ol style="list-style-type: none"> 2. Presentation of knowledge to groups 3. Teacher journal entries showing reflective teaching. 4. Engages productively in Professional Learning Community 5. Shares insights with colleagues in collaborative settings 6. Engages actively in professional development opportunities 7. Seeks out opportunities to learn with others 8. Willingly works with an instructional coach/teacher leader
c. The teacher applies research, knowledge, and skills from professional development opportunities to improve practice.	The teacher integrates his/her working knowledge of psychology (human development and motivation), sociology (organizational membership), pedagogy (instructional strategies) and subject matter to construct a coherent educational philosophy. Research ideas, knowledge, and skills are tried in the context of best practices. The teacher monitors the implementation and effect of using new learning within the classroom.	<ol style="list-style-type: none"> 1. Show growth in student achievement 2. Individual professional development plans 3. Observation notes from evaluator 4. Gathers and shares implementation data 5. Seeks assistance from others to improve practice
d. The teacher establishes and implements professional development plans based upon the teacher's needs aligned to the Iowa teaching standards and district/building student achievement goals.	The teacher collaborates in the development of their own professional development plan to meet district/building goals. Suggestions are elicited about their teaching and adapt their teaching to new ideas, findings, ideals, and theories. The teacher routinely participates and contributes to collective study with colleagues in order to implement district career plans and uses data about student performance and his/her practice to design individual career development plans.	<ol style="list-style-type: none"> 1. Well-developed individual professional development plan is created, implemented, and annually reviewed 2. Teacher collaboration notes 3. Professional Learning Community minutes showing use of student data to drive conversations 4. Evidence of self-reflection and improvement are shared

Criteria	Descriptor	Evidence
e. The teacher provides an analysis of student learning and growth based on teacher created tests and authentic measures as well as any standardized and district-wide tests.		<ol style="list-style-type: none"> 1. Multiple assessment data used to inform instruction 2. Engages productively with Professional Learning Community 3. Invites support and guidance from instructional coach/teacher leader and others in administering and understanding assessment measures.

Standard 8: Fulfills professional responsibilities established by the school district.

Criteria	Descriptor	Evidence
a. The teacher adheres to board policies, district procedures, and contractual obligations.	The teacher demonstrates professional commitment and respects the contractual requirements of his/her employment. The teacher adheres to district policies and procedures, including but not limited to documentation of student learning reports, accounting, and communication. The teacher works in conjunction with other school employees to understand board policies and practices and their implementation around complex situations.	<ol style="list-style-type: none"> 1. Evaluator observable notes 2. Documentation of mandatory training 3. Collaboration with other school employees around complex situations 4. Explicit connections between policies, procedures, and teacher practice 5. Meets contractual obligations
b. The teacher demonstrates professional and ethical conduct as defined by state law and district policy.	The teacher presents himself/herself to the school and community in a manner that elicits respect and complies with state laws defining the profession and in a manner that elicits respect, allowing for meaningful relationships with students, families, and colleagues.	<ol style="list-style-type: none"> 1. Completion of online ethics module 2. Professional conduct that aligns to district policies 3. Engages with colleagues and students in professional manner

Criteria	Descriptor	Evidence
c. The teacher contributes to efforts to achieve district and building goals.	The teacher participates in professional development opportunities to improve achievement of district and building goals. They initiate sharing of ideas with colleagues and contribute to school-wide events and learning activities.	<ol style="list-style-type: none"> 1. Participates in staff functions 2. Student work samples 3. Observation notes 4. Professional Learning Community agenda and minutes 5. Committee membership and activity minutes 6. Engages in professional development
d. Demonstrates an understanding of and respect for all learners and staff.	The teacher respects different values and beliefs other than one's own and works to ensure that all students are treated fairly. The teacher demonstrates cultural competence in engaging students and families.	<ol style="list-style-type: none"> 1. Evidence of translation of school and/or teacher notes into native language of families 2. Evidence of incorporating family values, traditions and culture into classroom and learning experiences 3. Works to address issues of equity 4. Instructional strategies align to the needs of all learners
e. Collaborates with students, families, colleagues, and communities to enhance student learning.	The teacher values and respects others' roles in student learning and welcomes their participation in the teaching process. They build trusting relationships with students, colleagues, and families that are student-centered and conducive to learning. The teacher reaches out to others proactively to establish positive relationships and rapport especially in challenging situations.	<ol style="list-style-type: none"> 1. Evidence of home visits 2. Evidence of involving others in behavior plans, transition plans and generalizing behavior and learning 3. Documentation of communication with a team concerning a challenging situation 4. Engages productively in parent communication and parent-teacher conferences

Model 3-Tiered Teacher Evaluation Framework

Tier 1: Beginning Teacher

Who: New beginning or new experience teacher

Purpose: Understanding and demonstrating the Iowa Teaching Standards

Process: Mentoring and induction; Collection of evidence related to the Iowa Teaching Standards; Regular observations and feedback by a trained evaluator; Comprehensive evaluation to determine licensure

Tier 2: Career Teacher

Who: All career teachers who demonstrate competence in the Iowa Teaching Standards

Purpose: Ongoing professional growth; Continuous implementation of the Iowa Teaching Standards

Process: Continuous review and documentation of evidence to support performance review every 3-years; Collaborative development of an individual professional development plan; Ongoing reflection and feedback on the individual professional development plan

Tier 3: Intensive Assistance

Who: Career teacher deficient in one or more Iowa Teaching Standards

Purpose: Enable a career teacher an opportunity to seek assistance in meeting the Iowa Teaching Standards; Provide a structured process for supporting and directing assistance related to the Iowa Teaching Standards

Process: Phases include awareness and assistance; Develop and implement professional assistance plan for no longer than 12 months; Ongoing evaluation of and feedback regarding the plan

Teacher evaluation is not an event. It is an ongoing learning opportunity that is intended to improve professional practice by engaging in peer reflection and coaching and continuous professional learning. Darling-Hammond and others (2012) have identified five attributes in high-quality, coherent and well-grounded teacher evaluation systems:

1. Common teaching standards related to meaningful student learning experiences;
2. Multi-faceted evidence linked to teacher practice, student learning and professional practices;
3. Well trained, knowledgeable and skilled evaluators that understand instruction;
4. Meaningful and useful coaching and feedback connected to professional development opportunities; and
5. Peer review and collaboration that promotes reflection and continuous improvement.

[Creating a Comprehensive System for Evaluating and Supporting Effective Teaching, SCOPE, 2012]

Teacher evaluation should provide opportunities for teachers at different developmental stages to be involved in processes and activities appropriate to their experience and expertise. Most importantly, the evaluation should promote professional development focused on improving student learning linked to building and district student achievement goals.

The Model Teacher Evaluation Framework is intended to depict an example of how a school district/area education agency embed and support the Iowa Teaching Standards and Criteria and above-mentioned attributes in a local teacher evaluation system. The model framework should serve as a guide to support the development and implementation of a quality teacher evaluation system. School districts/area education agencies will need to determine local policies, procedures and processes to ensure the appropriate use of the standards and criteria.

To assist local districts in designing and maintaining an effective teacher evaluation system, the Model Teacher Evaluation Framework outlines a basic 3-tiered approach to evaluation. A summary of each tier and a visual provides clarity about the tiers in regards to who, the purpose, the process, and additional resource.

Tier 1- Beginning Teacher Evaluation

The purpose of Tier 1 is to generate multiple, usable, and reliable pieces of evidence that will support deciding to recommend a beginning teacher for a standard teaching license. The procedures, processes, and relationships established and maintained within Tier 1 should assist new teachers in developing professionally and personally, promote a professional environment that encourages teachers and administration to understand the importance and usefulness of evaluation, and support the practice of personal and peer reflection and continuous professional learning. Local districts must also develop and/or coordinate a local beginning teacher mentoring and induction program [Iowa Code 284.4; IAC 281—83.3(1); IAC 281—83.3(2)] to enhance the success of beginning teachers in the classroom.

Tier 1 is specifically designed for beginning teachers (i.e., possessing an initial teacher license); however, districts are encouraged to include newly hired veteran teachers during their first two years in the district. By having them involved in Tier 1, the teachers would quickly learn the district's values and expectations even though there is not a licensure decision made for a teacher possessing at least an Iowa standard teacher license.

It is essential for Tier 1 participants to engage in professional learning (individually, small group and large group) to advance efforts in achieving district and building student learning goals outlined in the Comprehensive School Improvement Plan. The beginning teacher's involvement in these efforts should be adjusted to accommodate the demands of participating in mentoring and induction and the work load of a beginning teacher.

The district's teacher quality committee is responsible for developing model evidence for the Iowa Teaching Standards and Criteria. [Iowa Code 284.4(1b); IAC 281—83.7(2)] Therefore, the committee must determine what evidence (data, activities, etc.) provides sufficient information and experiences that will serve multiple purposes in Tier 1. In the review of best practices in teacher evaluation, three components were articulated:

1. Standards-based evaluation practices (observation, video clips, lesson plans, classroom assessments, etc.),
2. Evidence of teachers' contributions to the work of their colleagues and the school as a whole, and
3. Evidence of teachers' contributions to student learning through multiple sources.

These types of data are interrelated and should be considered equally in the review of the teacher's practice. Traditionally, observations, portfolios or other types of review have been used to demonstrate an understanding of the Iowa Teaching Standards and Criteria. A sample document (See Guidance for Using Model Descriptors and Evidence, p. 10-23) has been designed around those approaches; however, districts and the teacher quality committee are encouraged to be innovative in their design.

Tier 1 Activities:

- **Pre-Evaluation Information** – Building administrator (evaluator) meets with all beginning teachers within the first month of employment to discuss the district's beginning teacher evaluation plan and expectations, including a copy of the Iowa Teaching Standards and Criteria. The beginning teachers should also be provided copies of the evaluation guidelines and forms.
- **Observations** – The evaluator conducts three formal observations for each beginning teacher in year one and two with dates aligning with the local board educator evaluation policy. The observation cycle includes a pre-observation conference, the classroom observation, and a post-observation conference. The teacher completes any necessary pre- and post- observation forms and needs to be ready to share and discuss with the evaluator at the corresponding conferences. Additional observations may be conducted at the discretion of the evaluator.
- **Informal Observations** – Informal observations may be used at the discretion of the administrator to gather further evidence regarding the Iowa Teaching Standards and Criteria. These observations may include unannounced classroom observations or walkthroughs, professional behaviors in a variety of settings, involvement in extracurricular district activities, etc.
- **Portfolio** – The professional portfolio provides a beginning teacher an opportunity to collect individualized, credible, and factual evidence for evaluation and feedback purposes during the first and second year. The portfolio needs to serve as a catalyst to demonstrate substantive growth in the areas of teaching, philosophy, methods, and professional goals. An evaluator looks for concise, selective, evidence-based information from multiple sources that support the Iowa Teaching Standards and Criteria. During regularly scheduled conferences, the evaluator and teacher review and discuss the portfolio. The teacher may use the portfolio to reflect on the skills learned as part of the district's mentoring and induction program.
- **Summative Conference** – The licensed evaluator conducts a summative conference with the first-year teacher on or before the date articulated in local school board policy. The conference provides the teacher with a performance review based on the Iowa Teaching Standards and Criteria to include feedback and explanation from evidence gathered through formal and informal evaluation activities conducted during year one.
- **Comprehensive Evaluation** – The licensed evaluator conducts a comprehensive evaluation with a second-year teacher on or before the date articulated in local school board policy. A written evaluation includes the evaluator's licensure recommendation for the teacher or a recommendation for continued participation in the district's mentoring and induction program that should not exceed one year. The school district uses the comprehensive evaluation provided by the Iowa Department of Education [See Appendix 3a and 3b]. (IAC 284.3, subsection 2, Code Supplement 2001)
- **Individual Professional Development Plan** – The evaluator and teacher meet in the first month of year three to cooperatively design an individual professional development plan. The plan focuses on areas of the Iowa Teaching standards and Criteria that the evaluator and the teacher have jointly determined ongoing skill development needed in particular teaching standards and criteria and to achieve student achievement goals of the attendance center.

Tier 2: Career Teacher Evaluation

Given that most teachers in a district are neither beginners or in need of assistance, Tier 2 becomes the dominant strand within a local teacher evaluation system. Tier 2 is focused on the ongoing assessment of a career teacher's mastery of the Iowa Teaching Standards and Criteria and developing and supporting the professional growth of teachers. The purpose of this tier is to provide a structured, supportive, and collaborative environment to support professional growth linked to advancing the teacher's individual professional development plan, the district's comprehensive school improvement plan, and most importantly, student learning. The evaluator has continuous responsibility of monitoring the teachers practice by using multiple alternative sources of data to include but not limited to formal and informal observations, measures of student learning, review of professional development plans, student and parent feedback, etc.

An individual professional development plan needs to emphasize a continuous appraisal of the career teacher's performance. The plan and process needs to be flexible, creative, and stimulating. At a minimum, a teacher's plan should reflect the needs of the teacher, integrate the Iowa Teaching Standards and Criteria, and support the student learning goals of the attendance center. A teacher shares responsibility in developing and implementing the individual professional development plan with the evaluator and works collaboratively with colleagues in regularly monitoring and adjusting the plan. If summative and formative components of the teacher's evaluation indicate the teacher needs additional training and supports, the individual professional development plan should articulate the same skills and/or practices that are being studied collectively with other educational professionals. A team of teachers (e.g., grade-level, multi-grade, content specific, etc.) may collaboratively create, implement, monitor, and adjust a professional development plan if it satisfies the same criteria as an individual professional development plan.

While developing the Tier 2 and individual professional development plan phase, local districts must address some issues:

- The relationship between formative and summative components;
- The focus, timeframe, and requirements for developing the individual professional development plans;
- The role and responsibilities of the administrator in developing, monitoring, and supporting the plans; and
- The appropriate ways to provide the necessary documentation and feedback.

[Danielson, McGreal, Burke, and Beerens]

An individual professional development plan template [See Appendix 5a-5c] has been created to illustrate the alignment to district efforts and how these issues may be addressed within the Iowa Model Educator Evaluation System.

An evaluator needs to be satisfied that the plan addresses the building and/or district student learning goals and supports the Iowa Teaching Standards and Criteria. Individual or team professional development plan is reviewed, refined, and finalized annually and according to local board policy and performance review requirements for teachers outlined in IAC 284.8(1).

Tier 2 Activities:

The following Individual Professional Development Plan activities (areas of inquiry and/or investigations) could include but are not limited to:

- **Refinement of Current Practice** – Address the refinement of teaching skills and strategies (e.g., questioning, motivation techniques, small group instruction, cooperative learning, etc.) that the teacher is currently using in practice. The plan is generally done individually and is typically a short-term activity (one-year).
- **Acquisition of New Skills** – Assumes access to resources to acquire and support new skills or knowledge (e.g., integration of technology, research-based instruction strategies for a specific content area(s), teaching for understanding, etc.). The plan may be done by an individual but most likely by a team. It needs to clearly relate to the teaching discipline and the building improvement plan. The plan would likely be for two or three years.
- **Redesign/Restructuring** – Articulates a rationale for change, potential student outcomes, changes in curriculum and instruction, and an evaluation scheme. This plan requires additional resources, time, and district commitment. A redesign/restructuring plan is primarily a team activity that spans two or three years and connects directly to a building or district initiative (e.g., technology, personalized learning, multi-grade classrooms, standards-based grading, etc.).
- **Development of Curriculum/Program** – Three potential directions:
 - Deepening – Addresses moving curriculum coverage to a deeper level (i.e., focusing on themes rather than linear facts). Individuals or teams may engage in this work that generally spans one to three years.
 - Integrating – Focuses on developing integrated lessons and courses. A team approach is suggested with work spanning two to three years.
 - Engaging – Develops materials and activities with a focus on engaging students more in the work of the classroom. Individuals or teams may engage in this work that generally spans one to three years.
- **Monitoring Student Outcomes/Progress** – Addresses the development of new and/or alternative assessments that measure or describe student learning. The work may include collecting, interpreting, and disaggregating of student achievement data. An individual or team approach may be used spanning one to three years.
- **Special Populations/Opportunities to Learn** – Focuses on developing new or alternative learning opportunities for special needs students (e.g., gifted, at-risk, special education, etc.). An individual or team approach may be used spanning one to three years.
- **Completing Requirements for Licensing Endorsements** – Assists a teacher not fully licensed in an endorsement needed to instruct students in the teacher's educational setting.

Other Potential Strategies and/or Activities		Potential Products	
Not limited to any combination of the following		Not limited to any of the following	
Action Research	Workshops/Conferences	Student Portfolios	Curriculum Units
Coaching	Visitation of Model Programs	Videotapes of lessons	Performance Assessments
Videotaping	Lesson Designs	Study Groups	Reflective Journal
Study Groups	Classroom Observations	Case Study Analysis	Professional Portfolios
Mentoring	Teacher Academies	Student Inventories	Published Work
College Courses	Peer Observations/Conferences		
Simulations	Virtual Networking		
Shadowing Experiences	Professional Dialogue		

As an individual professional development plan reaches closure, two separate actions occur. The first action (a formative component) is the creation of a written review of the progress and the outcomes of

the plan. The written review is the responsibility of the individual teacher or team with the support of the evaluator. [A proposed outline for the structure of the written review is found in Appendix 3a.] The teacher or team should be prepared to discuss the written review and share results and/or products related to the plan. The district is encouraged to develop criteria that allows the teacher or team to demonstrate the quality, progress, involvement, etc. in the plan. A copy of the individual professional development plan and the subsequent written review should be placed in the individual teacher's district file.

The second action (a summative component) involves the evaluator writing an evaluation of the teacher or each member of the team. The evaluator needs to engage in the continuous collection of evidence during the period of time articulated in the individual professional development plan. The written evaluation is then based on multiple sources of evidence related to the Iowa Teaching Standards and Criteria and local district expectations garnered by the evaluator. Although a plan may be written for one-, two-, or three-years, a summative evaluation must occur every three years as stipulated in Iowa Code 284.3. The written evaluation then needs to be presented to and discussed with the teacher. [Suggested templates are included in Appendix 3a.]

Tier 3: Intensive Assistance Plan

The purpose of the Intensive Assistance Plan is to provide organizational support and assistance to career teachers who are not meeting the Iowa Teaching Standards and Criteria. The existence of this plan makes it possible for Tier 2 to focus on professional growth rather than remediation. In designing Tier 3, local districts should continue to focus on quality assurance, with support, that is expected to characterize the beginning teacher plan (Tier 1) and the individual professional development plan (Tier 2). The Intensive Assistance Plan demonstrates the district's commitment to quality teaching by providing a structured and supported system of assistance to ensure that every career teacher is meeting the Iowa Teaching Standards and Criteria. The decision regarding implementation of Tier 3 should be collaborative; however, it may be directive.

The Intensive Assistance Plan is further defined within Iowa Code section 284.8 and further explained in Iowa Administrative Rule 83.5(3). Specifically, if a supervisor or evaluator determines that a teacher's performance is not meeting the district expectations, the teacher will participate in an intensive assistance program. Once the teacher completes the intensive assistance plan, the evaluator re-evaluates the teacher's performance and evidence and makes the determination if the teacher successfully completed the program. If the teacher was not successful, the local school board may immediately terminate the teacher's contract, terminate the contract at the end of the school year, or continue the contract for no more than one year. If a teacher has previously participated in an Intensive Assistance Plan related to the Iowa Teaching Standards and Criteria, he or she may not participate in another intensive assistance program related to the same standards or criteria. The program and its implementation are not subject to negotiation or grievance procedures. A Tier 3 plan may begin at any time. Given the nature of the plan, confidentiality is expected by all parties.

Tier 3 defines two phases – Awareness and Assistance:

1. Awareness Phase

In the awareness phase, the evaluator identifies a problem relating to the Iowa Teaching Standards that is characteristic of a teacher's performance rather than anomaly. The evaluator needs to contact the teacher in writing, identifies the specific Iowa Teaching Standard(s) of concern, collaboratively develops a plan to resolve the problem, and schedules periodic meetings (not to exceed three months) with the teacher to discuss progress and potential barriers related to plan. While the teacher and evaluator attempt to resolve the problem, the

teacher remains in Tier 2 and works on the Individual Professional Development Plan. At the conclusion of plan, the evaluator will review the progress and evidence to make one of the following recommendations:

- The problem is resolved and the teacher is removed from the Awareness Phase and continues to work within Tier 2.
- If the issue is not resolved, the teacher is notified in writing and placed into the Assistance Phase. Placement in the Assistance Phase suggests that activities regarding the Individual Professional Development Plan would be suspended at the recommendation of the evaluator.

2. Assistance Phase

After the final meeting of the Awareness Phase and determination is made to move to the Assistance Phase, a letter is sent to the teacher to formally notify him/her of placement. A copy of the letter is forwarded to the Superintendent and placed in the teacher's personnel file. A teacher may request assistance for the local teacher association. A meeting is held between the teacher and evaluator to develop an Assistance Plan that includes a problem statement related to one or more of the Iowa Teaching Standards and a specific growth promoting goals that are measurable, action-oriented, realistic, and time-bound. A plan needs to identify and apply strategies needed to achieve the goals, establishes reasonable timelines for strategic actions, and aligns specific criteria for evaluating the successful completion of the plan.

A team of professionals, who have the knowledge and skills to assist the teacher in improving his/her performance, may be identified. The team may contribute to the development of the Assistance Plan, but they may not identify the standards by which the teacher is placed on intensive assistance or conduct the summative evaluation of the teacher. The designated and trained evaluator are responsible for conducting those actions

At the end of the Assistance Plan's timeframe, one of three recommendations are made by the evaluator at the conclusion of the summative evaluation:

- The problem is resolved. The teacher is removed from the Assistance Phase and returns to Tier II and the activities regarding the Individual Professional Development Plan.
- Progress is noted and work continues in the Assistance Phase. The timeline is extended but may not exceed twelve months according to Iowa law.
- No progress is noted to resolve the problem. Actions are taken by the evaluator and the district to move towards a recommendation for non-renewal of the contract or immediate termination.

A sample awareness phase, assistance phase, and final summary [See Appendix 6a – 6e] forms have been created to assist local districts.

Individual Educator Professional Development Plan

The Individual Educator Professional Development Plan (IEPDP) is intended to support the professional growth of individual educators as part of a district's focus on improving student learning. State of Iowa legislation requires each public-school district in Iowa have individual educator professional development plans in place for all career educators.

Iowa Administrative Rules – 281—83.6(284) and 281—83.12(284A) – outline the requirements for an IEPDP as follows:

- Each individual educator professional development plan shall align to the fullest extent possible with the district professional development plan.
- The purpose of the IEPDP is to promote individual and collective professional development.
- At a minimum, the goals for an IEPDP must be based on relevant Iowa Teaching Standards or the Iowa Standards for School Leaders that support the student achievement goals of the attendance center and school district or area education agency, as appropriate, as outlined in the comprehensive school improvement plan, and the needs of the educator.
- The goals shall go beyond those required under the attendance center/district professional development plan. The learning opportunities provided to meet the goals of the IEPDP include individual and collaborative study of district- or area education agency-determined content to the extent possible.
- The IEPDP shall be developed by the educator in collaboration with the educator's evaluator.
- An annual meeting shall be held between the educator and the evaluator to review the goals and refine the plan.

The IEPDP for a career educator may be congruent with the district- and building-level professional development plans, and the process described in the Iowa Professional Development Model (IPDM) may be used simultaneously to implement plans across all levels. Individual plans should address the district and building goals by extending collective learning to refine the educator's knowledge and skills. Individual plans are also intended to individualize the learning to address other standards and criteria as needed to build the educator's capacity to enhance student learning.

The purpose of quality professional development is to accomplish transfer of newly learned knowledge and skills throughout the educational system. To accomplish the district and/or building goals of improving learning for all students, all educators need to engage in professional growth to develop their practices. Educators learn best when they have frequent opportunities for engagement with colleagues in solving problems and learning new knowledge and skills that represent collective concerns.

As described in the rules, the educator's plan for professional development is to be crafted collaboratively with the educator's evaluator. The intent of this requirement is that the development and maintenance of the IEPDP be a collaborative process in which the educator and the evaluator work together to design an individual plan that will build the capacity of the educator and contribute to the overall professional learning goals established for the building and/or the district.

The Educator Quality Program states that goals must be based on the building-/district-level professional development plan. The rules require that the IEPDP also include goals that go beyond building-/district-level professional development priorities. In keeping with the Iowa Professional Development Model and the requirements for the individual plans, it is necessary to use data to determine goals for the educator's professional growth. The educator and the evaluator should look at the analysis of student learning data, the goals for the district professional development plan, and the goals established for the building-level professional development plan. Information about the educator's needs related to their respective professional standards (Iowa Teaching Standards or the Iowa

Standards for School Leaders) should be considered when deciding on the most important knowledge and skills to work on.

When professional growth for educators is based on district- and building-level student learning data, and student achievement goals, it is likely that the IEPDP for the career educator will focus on learning the knowledge and skills that address the priorities established in the district and building professional development plans, with specific refinement or extensions that personalize those district and/or building professional development priorities. For many educators, goals beyond the building- and/or district-level priority will add onto or complement the existing professional development priorities, because the same data used to set the building and/or district goal are used as the rationale for the individual goal. The learning opportunities for goals beyond the district and/or building goal should help the individual to apply what is being learned through the collective professional development and add to his or her repertoire in related content, pedagogy, or both. This type of plan will readily meet the requirement that the educator's individual plan align to the fullest extent possible with the district or school professional development plan.

For some educators, the data analysis and dialogue with the evaluator will suggest an additional area of need that is not related to the district- or building-level professional development goals. Goals for these educators will include learning about the district and/or building priority plus another area of focus. Goals that add another area of focus must be based on the educator's needs and on the relevant professional standards (Iowa Teaching Standards or the Iowa Standards for School Leaders) that support the student learning goals of the building and/or district (or area education agency). Information about the educator's strengths and needs gathered from the evaluation process is a useful source of data to help identify professional learning needs to address the professional standards.

Suggested Steps for Developing an Individual Educator Professional Development Plan

□ Initial data analysis

Educators work collaboratively with the administrators and the professional development leadership team to:

- Review district, building, and classroom level student data
- Review the district- and building-level professional development plans
- Review the professional standards (i.e., Iowa Teaching Standards, Iowa Standards for School Leaders, etc.)

□ Individual reflection and self-assessment to set goals

The educator uses the information gathered in the initial data analysis and extends the process:

- What do I need to learn to extend, refine, support, etc. my knowledge and skills in the identified goal area?
- What do I need to do to increase my application of these skills?
- Who might have similar individual goals that might work with me to extend my knowledge and skills?
- Have I gotten feedback and/or examined data from multiple sources that suggest my effectiveness in one or more of professional standards requiring attention and support? If yes, what knowledge and skill(s) do I need to acquire?
- What should I study and practice?
- Is this content and/or pedagogy research-based?

- Do my goals address specific professional standards (i.e., Iowa Teaching Standards, Iowa Standards for School Leaders, etc.)?
- How does this align with district and/or building priorities?

☐ **Design the learning opportunities**

Select or design ways to support the educator in learning new knowledge and skills:

- What learning experiences would ensure that I master this priority?
- What support do I need?
- Who else can I study and learn with?
- How can I collaborate with others (e.g., plan lessons, observe others, study student work, etc.)?

☐ **Indicators of success**

List the indicators that will be used to document the accomplishment of the goal:

- How can I demonstrate to my evaluator that I have applied what I learned?
- How can I showcase how students benefited from this work?

☐ **Establish a time line**

- What is a good schedule for accomplishing my goal(s)?
- When should I share progress?

☐ **Finalize the written plan**

A written individual educator plan will be the product of ongoing discussion with the evaluator and possibly colleagues.

Samples and templates of IEPDP are provided in Appendix 5a – 5c.

Practitioner Collaboration and Peer Review

Practitioner collaboration and peer review are a means to enhance the education profession by providing educators opportunities to boost their practice through structured interactions with a focus on instruction. Schools and districts have implemented Teacher Leadership and Compensation (TLC), Professional Learning Communities (PLC), Authentic Intellectual Work (AIW), and other models to advance collaboration and peer review in educational setting.

In 2007, the DE released the Iowa Professional Development Model (IPDM) in an effort to establish an expectation that professional development be created, implemented, monitored, and adjusted to realize student learning gains at all levels. In 2013, the Iowa Legislature amended Iowa Code [Sections 284.6(8) and 284.8(1)] to again call for all educators to work collectively at improving teaching and leadership practice by requiring educators to engage in practitioner collaboration and peer review.

Practitioner Collaboration

In Iowa Code section 284.6(8), practitioner collaboration means the collaboration of practitioners to be intended broadly and is inclusive of teachers and school leaders working to improve instruction and, ultimately, student learning. To ensure and support regular and timely collaboration, the same Iowa Code section requires that at least 36 hours annually “outside of the minimum school day,” during “non-preparation time or designated professional development time,” must be used by “practitioners to collaborate with each other” or “to engage in peer review” activities.

The collaboration time or review time should not be confused with individual educator preparation time or traditional professional development, and districts should not count individual preparation time as collaboration time. Another distinguishing element of the practitioner collaboration is heavy reliance on the use of “one-to-one” or “many-to-many” collaborations among educators. It is expected that there is an authentic interaction among educators focused on instructional matters within their schools and districts. The professional learning intended in Iowa Code section 284.6(8) actively involves the educators and includes self-, peer-, or team-directed and active in nature.

Peer Review

Under Iowa Code section 284.8(1), school districts are required to conduct annual, rather than every third year, reviews of non-probationary teacher performance. The first and second years of such reviews are conducted by a peer group of teachers. The Iowa Legislature specifically prohibited peer reviews from being used as the basis for recommending that a teacher be placed in an intensive assistance program. As such, the peer review is intended for the purposes of coaching and improvement.

A peer review may be high quality when –

- Practitioners develop ownership of educator practices and move toward making its discussion and improvement more visible within the school community.
- A group of educators are analyzing, reflecting upon, and talking about their profession in an attempt to improve student learning.
- Districts use the evaluation framework as a basis for discussion, support, and planning – and not intended to inform the summative evaluation. The review should be used as an element of coaching with a focus on improvement.
- A peer review is reflective in nature by both the educator and the reviewer around their practice – openly sharing strengths, limitations, observations, etc. Reviewers should make thoughtful judgements about an educator’s practice and consider each educator individually.

- Teacher leadership structures are used to promote collaboration by developing and supporting opportunities for teacher in schools to learn from each other to improve student achievement by strengthening instruction.

Sample



Teacher Evaluation Area Education Agencies

Sample

Iowa Teaching Standards with AEA Criteria

Alternative criteria for Area Education Agency staff who meet the definition of “teacher”.

Standard 1: Demonstrates ability to enhance academic performance and support for implementation of the school district’s student achievement goals.

The staff member:

1. Uses knowledge and understanding of area education agency’s mission, goals, and strategic priorities to provide services that enhance academic performance.
2. Understands and uses knowledge of area education agency and district goals and data to provide services that enhance academic performance.
3. Participates in and contributes to a positive learning culture.
4. Communicates with students, families, colleagues, and communities effectively and accurately.
5. Uses area education agency, district, and student data as a guide for decision making.

Standard 2: Demonstrates competence in content knowledge appropriate to the teaching position.

The staff member:

1. Understands, communicates, and uses key concepts and best practice in fulfillment of area education agency roles and responsibilities.
2. Uses knowledge of child and adolescent development and of adult learning to make interventions and strategies meaningful, relevant, and accessible.
3. Relates professional knowledge and services within and across multiple content and discipline areas.
4. Understands and supports strategies and interventions that are best practice across content and discipline areas.

Standard 3: Demonstrates competence in planning and preparing for instruction.

The staff member:

1. Demonstrates the ability to organize and prioritize time, resources, and responsibilities.
2. Demonstrates the ability to individually and collaboratively plan and prepare professional services that address the range of district, teacher, parent, and student needs.
3. Uses district and student data to develop goals and interventions.
4. Demonstrates the flexibility to plan for professional services based on changing conditions of the work context and environment.
5. Uses available resources, including technology, to plan and develop professional services.

Standard 4: Uses strategies to deliver instruction that meets the multiple learning needs of students.

The staff member:

1. Aligns service delivery to district, teacher, parent, and student needs.
2. Provides consultation, instruction, interventions, and strategies that align with learner needs.
3. Demonstrates flexibility and responsiveness in adjusting services to meet diverse learner needs.
4. Uses and supports research-based and evidence-based practices to meet learner needs.
5. Uses available resources, including technology, to provide professional services that meet learner needs.

Standard 5: Uses a variety of methods to monitor student learning.

The staff member:

1. Uses appropriate assessment, data collection, and data analysis methods that support alignment of services with learner needs.
2. Works collaboratively within the learning community to establish measurable goals and to identify formative and summative methods to monitor progress and the quality of implementation.
3. Communicates the rationale and criteria of assessment and monitoring methods.
4. Elicits and provides timely and quality feedback on assessment and monitoring.

Standard 6: Demonstrates competence in classroom management.

The staff member:

1. Models respectful dialogue and behaviors within and across job responsibilities.
2. Promotes and maintains a positive, safe, and productive environment.
3. Works collaboratively and is flexible.
4. Communicates accurately and effectively.

Standard 7: Engages in professional growth.

The staff member:

1. Demonstrates habits and skills of continuous inquiry and learning.
2. Works collaboratively to improve professional practices.
3. Applies and shares research, knowledge, and skills from professional development.
4. Establishes and implements professional development plans aligned to area education agency, district, and student learning goals.

Standard 8: Fulfills professional responsibilities established by the school district.

The staff member:

1. Adheres to board policies, area education agency procedures, federal and state rules, and contractual obligations.
2. Demonstrates professional and ethical conduct as defined by state law and area education agency policies.
3. Contributes to efforts to achieve area education agency goals.
4. Demonstrates an understanding of and respect for all learners.
5. Collaborates with all learners.

Educator Evaluation System for AEA Contracted Staff

Current Iowa Code and Administrative Rules do not mandate a model educator evaluation system for AEA contracted staff. Each of the current AEAs use the eight Iowa Teaching Standards for AEA professionals who meet the definition of teacher in their respective evaluation systems. The agencies have also outlined three purposes related to an effective evaluation system in an AEA system:

- Provide clear performance expectations to promote quality assurance and accountability.
- Increase professional learning for professional educators in an effort to create and support a community of learners.
- Increase student learning.

AEA professionals and those responsible for evaluating contracted staff are encouraged to study and support their AEA evaluation system and the Iowa Teaching Standards and Criteria for AEA professionals. A well-designed and effectively implemented evaluation system is critical in achieving all three purposes.

Sample



School Administrator Evaluation

Sample

Iowa Standards for School Leaders

The new Iowa Standards for School Leaders were adopted by the Iowa State Board of Education on November 18, 2020, and went into effect on July 1, 2021. The standards are placed in Iowa Administrative Rule [281—83.10] in to support the evaluation of school leaders. The Iowa Standards for School Leaders are organized around the domains, qualities, and values of leadership work that research and practice indicate contribute to students' academic success and well-being. The standards provide a framework to guide leadership practice and how leaders are prepared, hired, developed, supervised and evaluated. A local school board may establish additional administrator standards and related criteria, but shall at a minimum utilize the following standards:

STANDARD 1. MISSION, VISION, AND CORE VALUES

Educational leaders develop, advocate, and enact a shared mission, vision, and core values of high-quality education and academic success and well-being of each student.

STANDARD 2. ETHICS AND PROFESSIONAL NORMS

Educational leaders act ethically and according to professional norms to promote each student's academic success and well-being.

STANDARD 3. EQUITY AND CULTURAL RESPONSIVENESS

Educational leaders strive for equity of educational opportunity and culturally responsive practices to promote each student's academic success and well-being.

STANDARD 4. CURRICULUM, INSTRUCTION, AND ASSESSMENT

Educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction, and assessment to promote each student's academic success and well-being.

STANDARD 5. COMMUNITY OF CARE AND SUPPORT FOR STUDENTS

Educational leaders cultivate an inclusive, caring, and supportive school community that promotes the academic success and well-being of each student.

STANDARD 6. PROFESSIONAL CAPACITY OF SCHOOL PERSONNEL

Educational leaders develop the professional capacity and practice of school personnel to promote each student's academic success and well-being.

STANDARD 7. PROFESSIONAL COMMUNITY FOR TEACHERS AND STAFF

Educational leaders foster a professional community of teachers and other professional staff to promote each student's academic success and well-being.

STANDARD 8. MEANINGFUL ENGAGEMENT OF FAMILIES AND COMMUNITY

Educational leaders engage families and the community in meaningful, reciprocal, and mutually beneficial ways to promote each student's academic success and well-being.

STANDARD 9. OPERATIONS AND MANAGEMENT

Educational leaders manage school operations and resources to promote each student's academic success and well-being.

STANDARD 10. SCHOOL IMPROVEMENT

Educational leaders act as agents of continuous improvement to promote each student's academic success and well-being.

Adapted from National Policy Board for Educational Administration (2015). Professional Standards for Educational Leaders 2015. Reston, VA: Author.

Iowa School Administrator Evaluation Tools and Resources

Currently, additional resources and tools to support the implementation of the new ISSL standards may be found at this [link](#). Thanks to School Administrators of Iowa (SAI) for their support to school leadership in Iowa.

Sample



Appendices

Sample

Appendix 1a – Sample Teacher Pre-observation Form

Educator:

District/Building:

Date of Pre-conference:

Date of Observation:

Grade Level/Curriculum Area Observed:

Lesson Objectives:

Reference ORID

Pre-Observation Questions	Conference Notes
Briefly describe the students in this class, including those with special needs.	
How will students be grouped during the classroom observation? If necessary, please note any special arrangements.	
What Iowa Teaching Standards & Criteria will be observed in this lesson?	
How will prior knowledge be (or has been) assessed?	
What instructional strategies do you plan to use to engage students in the content?	

Pre-Observation Questions	Conference Notes
What instructional materials or other resources will you use during the lesson?	
What difficulties with the lesson do you anticipate the students might have?	
How do you plan to assess student achievement in meeting the lesson's objective? How will you use the results of the assessment?	
Please tell me any other information you feel pertinent to this lesson.	
What data and information will be collected during classroom observation?	
What other questions need to be asked prior to the classroom observation?	

Appendix 1b – Sample Teacher Pre-observation Form

Teacher:

District/School:

Evaluator:

Date of Pre-observation Conference:

Grade Level/Content:

Date of Observation:

1. Briefly describe the students in the class, including those with special needs.
2. What are the goals for the lesson? What will the students learn?
3. How do these goals support the common core content standards?
4. How does the teacher plan to engage students in the content? What will the teacher do? What will the students do?
5. What difficulties do students typically experience with this content? How does the teacher plan to anticipate these difficulties?
6. What instructional materials or other resources, if any, will the teacher use? Share samples of the materials with the evaluator.
7. How do plan to assess student learning of the goals? What procedures will you use? Share any performance tasks, rubrics, scoring guides, tests, etc. with evaluator.
8. What Iowa Teaching Standards and Criteria will be demonstrated during the observation?

Teacher comments pertaining to the observation setting. The teacher is asked to list any item he or she might want to call to the attention of the evaluator.

Appendix 2 – Sample Observation Reflection

Teacher:

District/School:

Grade Level/Content:

Date of Observation:

1. List the Iowa Teaching Standards and Criteria related to the observed lesson.
2. As the teacher reflects on the observed lesson, to what extent were students actively engaged?
3. What evidence was collect during and/or after the observed lesson by the teacher to demonstrate that students learned what was intended?
4. How and why was the instructional plan altered to best meet the learning needs of students?
5. If given the opportunity to teach the lesson again to the same students, what would be done differently? Why?
6. Attach several student work samples related to the lesson that reflect the full range of student ability in the class and includes feedback provided to the students.

Appendix 3a – Comprehensive/Summative Teacher (Pk-12) Evaluation Form

Educator:

Folder Number:

Evaluator:

Folder Number:

Grade Level and/or Subject:

Year: 1 2 3

Standard 1: Demonstrates ability to enhance academic performance and support for implementation of the school district's student achievement goals.

The teacher:

- a. Provides multiple forms of evidence of student learning and growth to students, families, and staff.
- b. Implements strategies supporting student, building, and district goals.
- c. Uses student performance data as a guide for decision making.
- d. Accepts and demonstrates responsibility for creating a classroom culture that supports the learning of every student.
- e. Creates an environment of mutual respect, rapport, and fairness.
- f. Participates in and contributes to a school culture that focuses on improved student learning.
- g. Communicates with students, families, colleagues, and communities effectively and accurately.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 2: Demonstrates competence in content knowledge appropriate to the teaching position.

The teacher:

- a. Understands and uses key concepts, underlying themes, relationships, and different perspectives related to the content area.
- b. Uses knowledge of student development to make learning experiences in the content area meaningful and accessible for every student.
- c. Relates ideas and information within and across content areas.
- d. Understands and uses instructional strategies that are appropriate to the content area.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<div>Meets Standard</div> <div>Does Not Meet Standard</div>

Standard 3: Demonstrates competence in planning and preparing for instruction.

The teacher:

- a. Uses student achievement data, local standards, and the district curriculum in planning instruction.
- b. Sets and communicates high expectations for social, behavioral, and academic success of all students.
- c. Uses student's developmental needs, backgrounds, and interests in planning for instruction.
- d. Selects strategies to engage all students in learning.
- e. Uses available resources, including technologies, in the development and sequencing of instruction.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<div>Meets Standard</div> <div>Does Not Meet Standard</div>

Standard 4: Uses strategies to deliver instruction that meets the multiple learning needs of students.

The teacher:

- a. Aligns classroom instruction with local standards and district curriculum.
- b. Uses research-based instructional strategies that address the full range of cognitive levels.
- c. Demonstrates flexibility and responsiveness in adjusting instruction to meet student needs.
- d. Engages students in varied experiences that meet diverse needs and promote social, emotional, and academic growth.
- e. Connects students' prior knowledge, life experiences, and interests in the instructional process.
- f. Uses available resources, including technologies, in the delivery of instruction.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 5: Uses a variety of methods to monitor student learning.

The teacher:

- a. Aligns classroom assessment with instruction.
- b. Communicates assessment criteria and standards to all students and parents.
- c. Understands and uses the results of multiple assessments to guide planning and instruction.
- d. Guides students in goal setting and assessing their own learning.
- e. Provides substantive, timely, and constructive feedback to students and parents.
- f. Works with other staff and building and district leadership in analysis of student progress.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 6: Demonstrates competence in classroom management.

The teacher:

- a. Creates a learning community that encourages positive social interaction, active engagement, and self-regulation for every student.
- b. Establishes, communicates, models, and maintains standards of responsible student behavior.
- c. Develops and implements classroom procedures and routines that support high expectations for student learning.
- d. Uses instructional time effectively to maximize student achievement.
- e. Creates a safe and purposeful learning environment.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 7: Engages in professional growth.

The teacher:

- a. Demonstrates habits and skills of continuous inquiry and learning.
- b. Works collaboratively to improve professional practice and student learning.
- c. Applies research, knowledge, and skills from professional development opportunities to improve practice.
- d. Establishes and implements professional development plans based upon the teacher's needs aligned to the Iowa Teaching Standards and district/building student achievement goals.
- e. Provides an analysis of student learning and growth based on teacher created tests and authentic measures as well as standardized and district-wide tests.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Educator: _____

Date: _____

Standard 8: Fulfills professional responsibilities established by the school district.

The teacher:

- a. Adheres to board policies, district procedures, and contractual obligations.
- b. Demonstrates professional and ethical conduct as defined by state law and district policy.
- c. Contributes to efforts to achieve district and building goals.
- d. Demonstrates an understanding of and respect for all learners and staff.
- e. Collaborates with students, families, colleagues, and communities to enhance student learning.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	Meets Standard
	Does Not Meet Standard

Comprehensive/Summative Evaluation Signature Section

Evaluation Period:

[Insert start date.]

TO

[Insert end date.]

Check all that apply:

- ☐ The teacher is a first year Beginning Teacher.
- ☐ The teacher is a second year Beginning Teacher.
- ☐ The teacher meets or exceeds all eight Iowa Teaching Standards and is recommended for a standard license.
- ☐ The teacher is being recommended for a third year before a license decision is made.
[The district must contact the Board of Educational Examiners to receive the necessary form needing to communicate the decision made on each second year Beginning Teacher or to extend the provisional license for a third year.]
- ☐ The teacher does not meet the Iowa Teaching Standards.

Evaluator's Signature: _____

Date: _____

Teacher's Signature: _____

Date: _____

Appendix 3b – Comprehensive/Summative Teacher (AEA) Evaluation Form

Educator:

Folder Number:

Evaluator:

Folder Number:

Grade Level and/or Subject:

Year: 1 2 3

Standard 1: Demonstrates ability to enhance academic performance and support for implementation of the school district's student achievement goals.

The staff member:

1. Uses knowledge and understanding of area education agency's mission, goals, and strategic priorities to provide services that enhance academic performance.
2. Understands and uses knowledge of area education agency and district goals and data to provide services that enhance academic performance.
3. Participates in and contributes to a positive learning culture.
4. Communicates with students, families, colleagues, and communities effectively and accurately.
5. Uses area education agency, district, and student data as a guide for decision making.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
<div>Sample</div>	Meets Standard
	Does Not Meet Standard

Standard 2: Demonstrates competence in content knowledge appropriate to the teaching position.

The staff member:

1. Understands, communicates, and uses key concepts and best practice in fulfillment of area education agency roles and responsibilities.
2. Uses knowledge of child and adolescent development and of adult learning to make interventions and strategies meaningful, relevant, and accessible.
3. Relates professional knowledge and services within and across multiple content and discipline areas.
4. Understands and supports strategies and interventions that are best practice across content and discipline areas.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 3: Demonstrates competence in planning and preparing for instruction.

The staff member:

1. Demonstrates the ability to organize and prioritize time, resources, and responsibilities.
2. Demonstrates the ability to individually and collaboratively plan and prepare professional services that address the range of district, teacher, parent, and student needs.
3. Uses district and student data to develop goals and interventions.
4. Demonstrates the flexibility to plan for professional services based on changing conditions of the work context and environment.
5. Uses available resources, including technology, to plan and develop professional services.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 4: Uses strategies to deliver instruction that meets the multiple learning needs of students.

The staff member:

1. Aligns service delivery to district, teacher, parent, and student needs.
2. Provides consultation, instruction, interventions, and strategies that align with learner needs,
3. Demonstrates flexibility and responsiveness in adjusting services to meet diverse learner needs.
4. Uses and supports research-based and evidence-based practices to meet learner needs.
5. Uses available resources, including technology, to provide professional services that meet learner needs.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 5: Uses a variety of methods to monitor student learning.

The staff member:

1. Uses appropriate assessment, data collection, and data analysis methods that support alignment of services with learner needs.
2. Works collaboratively within the learning community to establish measurable goals and to identify formative and summative methods to monitor progress and the quality of implementation.
3. Communicates the rationale and criteria of assessment and monitoring methods.
4. Elicits and provides timely and quality feedback on assessment and monitoring.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 6: Demonstrates competence in classroom management.

The staff member:

1. Models respectful dialogue and behaviors within and across job responsibilities.
2. Promotes and maintains a positive, safe, and productive environment.
3. Works collaboratively and is flexible.
4. Communicates accurately and effectively.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 7: Engages in professional growth.

The staff member:

1. Demonstrates habits and skills of continuous inquiry and learning.
2. Works collaboratively to improve professional practices.
3. Applies and shares research, knowledge, and skills from professional development.
4. Establishes and implements professional development plans aligned to area education agency, district, and student learning goals.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Standard 8: Fulfills professional responsibilities established by the school district.

The staff member:

1. Adheres to board policies, area education agency procedures, federal and state rules, and contractual obligations.
2. Demonstrates professional and ethical conduct as defined by state law and area education agency policies.
3. Contributes to efforts to achieve area education agency goals.
4. Demonstrates an understanding of and respect for all learners.
5. Collaborates with all learners.

Provide a narrative and additional documentation/artifacts to support MEETING or NOT MEETING the standard and criteria.	Circle or Highlight One:
	<p>Meets Standard</p> <p>Does Not Meet Standard</p>

Comprehensive/Summative Evaluation Signature Section:

Evaluation Period:

[Insert start date.]

TO

[Insert end date.]

Check all that apply:

- ☐ The teacher is a first year Beginning Teacher.
- ☐ The teacher is a second year Beginning Teacher.
- ☐ The teacher meets or exceeds all eight Iowa Teaching Standards and is recommended for a standard license.
- ☐ The teacher is being recommended for a third year before a license decision is made.
[The district must contact the Board of Educational Examiners to receive the necessary form needing to communicate the decision made on each second year Beginning Teacher or to extend the provisional license for a third year.]
- ☐ The teacher does not meet the Iowa Teaching Standards.

Evaluator's Signature: _____

Date: _____

Teacher's Signature: _____

Date: _____

Appendix 4 – SMART Goal Guidance

The Iowa Department of Education recommends the use of SMART goals when monitoring professional practice as part of continuously improving the professional practices of educators. SMART is an acronym standing for Specific, Measurable, Attainable, Results-based, and Time-bound.

SMART goals provide a clear understanding of expected levels of and articulate intended actions for improving an educator's professional practice. The goals provide focused attention and resources on what is most important so an educator can be successful in achieving personal and professional priorities on a daily basis.

What to consider when crafting a SMART Goal?

1. The educator needs to think about the whole job, the broad areas of responsibility and results, and the ongoing conversations with colleagues and the evaluator regarding student learning and professional practice.
2. Goals need to be high level enough to encompass the core outcomes for which the educator is responsible, but specific and clear enough so the educator will be able to measure success.
3. Goals should be on-going job responsibilities and linked to building/district learning priorities, district/building initiatives, or new projects.
4. If there are too many goals, it may be an indicator that the goals are scoped at too low a level and focused more on tasks than on end results.
5. If the goals are becoming too numerous and task-oriented, the educator and evaluator may want to consider combining several goal statements into a broader outcome.

Writing a SMART Goal

S – Specific

When setting a goal, the educator and evaluator need to be specific about what needs to be accomplished. Specific goals need to be well-defined and free ambiguity or generality. The consideration of “W” questions may assist in developing goals that are specific:

- ☐ Who – Who needs to be involved to achieve the goal?
- ☐ What – What will the goal specifically accomplish?
- ☐ When – When will the goal be attained?
- ☐ Where – Where will the educator accomplish this goal?
- ☐ Which – Which requirements or constraints are involved in achieving the goal?
- ☐ Why – Why was the goal chosen? (Reasons, purposes, benefits, etc.)

Specific actions may include verbs like – oversee, update, write, coordinate, process, supervise, develop, provide, manage, create, maintain, plan, implement, support, evaluate, transition, produce, administer.

M – Measurable

What metrics should the educator and evaluator use to determine goal attainment? There needs to be a source of information to measure or determine whether a goal has been achieved. The educator and evaluator should have ongoing conversations about relevant and feasible data sources and collection methods. Measurable goals need to have concrete criteria for measuring progress toward achievement. Criteria typically include quantitative (How much? How many?) measures as opposed to qualitative (What is it like?).

A – Attainable or Achievable

A goal is meant to inspire and motivate, not discourage. The educator and evaluator need to focus on how important the goal is to the educator’s work and determine what they can do to make it attainable. New skill development and a possible attitude change may be needed; however, too far-reaching or sub-par goals become meaningless and should be avoided.

R – Relevant or Results-based

Relevance refers to focusing on something that makes sense with the broader district or building goals. The SMART goal needs to focus on results and relevant to the mission of the school/building, assisting the overall effort of the school forward.

T – Time-Bound

Time-bound goals occur within a specific and realistic timeframe. Often in schools and/or classrooms, a reasonable timeframe may be a school year, a semester, a quarter, or a multi-year goal. It will be dependent on local context and need.

SMART Goal Planning Template

Question	Plan Description
Specific Who will improve and by how much?	
Measurable How will the improvement be measured?	
Achievable What will the educator do to make sure students achieve?	
Relevant How does this align with district and/or building goals?	
Time Bound When will the change be measured?	
SMART Goal Statement	

Appendix 5a – Individual Educator Professional Development Plan Template

Individual Educator Professional Development Plan

School District:

Educator Name:

Evaluator Name:

General Individual Educator Professional Development Plan Focus:

School Year:

Building:

Date:

Goal for Professional Growth (SMART Goal format is suggested.):

Individual Educator Professional Development Plan Rationale

Student Learning Needs Addressed (Include baseline data for analysis of the goal and progress.):

Alignment to Building and/or District Student Achievement Goals:

Professional Development Training/Learning Opportunities and Collaborative Team Activities:

Professional Standards and Criteria Aligned to the Desired Goal (Iowa Teaching Standards or Iowa Standards for School Leaders):

Indicators of Success Aligned to the Desired Goal:

Resources Needed to Implement the Plan:

Project Timeline to Achieve Desired Goal:

Individual Educator Professional Development Plan - Annual Review

	Summary of Goal Status	Additions (If additional goals are added, provide rationale, indicators, and resources needed.)	Date of Annual Review (Include Educator and Evaluator Initials.)
Year 1			
Year 2			

	Summary of Goal Status	Additions (If additional goals are added, provide rationale, indicators, and resources needed.)	Date of Annual Review (Include Educator and Evaluator Initials.)
Year 3			

Additional Goals

Goal for Professional Growth (SMART Goal format is suggested.):

Student Learning Needs Addressed (Include baseline data for analysis of the goal and progress.):

Alignment to Building and/or District Student Achievement Goals:

Professional Development Training/Learning Opportunities and Collaborative Team Activities:

Professional Standards and Criteria Aligned to the Desired Goal (Iowa Teaching Standards or Iowa Standards for School Leaders):

Indicators of Success Aligned to the Desired Goal:

Resources Needed to Implement the Plan:

Project Timeline to Achieve Desired Goal:

Educator Signature:

Date:

Evaluator Signature:

Date:

Appendix 5b – Individual Educator Professional Development Plan Template

Individual Educator Professional Development Plan

School District:

Educator Name:

Evaluator Name:

Professional Growth Goal (SMART Goal format is suggested.):

School Year:

Building:

Date:

What student data suggest that the professional learning is necessary?

How will the goal contribute to student learning in the priority areas identified in the district and building plans?

Which professional standards and criteria (Iowa Teaching Standards or Iowa Standards for School Leaders) will be addressed by the goal?

What are the training/learning opportunities an educator engage in to support the goal?

How will the educator engage in collaborative efforts to learn and apply new knowledge and skills?

What indicators will the educator use to document the accomplishment of the goal?

(Include products and artifacts that document participation, implementation and student results.)

What supports are needed to implement the plan?

Individual Educator Professional Development Plan - Annual Review

	Summary of Status on Goal 1	Summary of Status on Goal 2	Summary of Status on Goal 3	Date of Annual Review (Educator and Evaluator Initials)
Year 1				
Year 2				
Year 3				

Additional goals (Add pages as needed.)

Comments:

Educator Signature:

Evaluator Signature:

Date:

Date:

Appendix 5c – Individual Educator Professional Development Plan Template

Individual Educator Professional Development Plan

School District:

Educator Name:

Evaluator Name:

Goal for Professional Growth (SMART Goal format suggested.):

School Year:

Building:

Date:

Alignment to Building and/or District Student Learning Goals:

Action Plan

Actions Steps	Indicators of Success	Time Frame

Annual Review

	Summary of Goal Status	Additions (If additional goals are added, provide rationale, indicators, and resources needed.)	Date of Annual Review (Include Educator and Evaluator Initials.)
Year 1			
Year 2			
Year 3			

Educator Signature:

Date:

Evaluator Signature:

Date:

Appendix 6a – Tier 3 Intensive Assistance

Awareness Phase – Identification of Concern Form

Teacher:

Evaluator/Administrator:

Date:

Step 1: Identification of Specific Concerns Regarding the Iowa Teaching Standards

Iowa Teaching Standard and Criteria	Evidence to Support Concern

Step 2: Establish Meeting to Discuss Identified Standards and Supporting Evidence

Next Meeting Date:

Location:

Time:

Step 3: Signatures

Teacher Signature:

Date:

Evaluator/Administrator Signature:

Date:

Sample

Appendix 6b – Tier 3 Intensive Assistance

Awareness Phase – Final Summary Form

Teacher:

Evaluator/Administrator:

Date:

Step 1: Specific Concerns Regarding the Iowa Teaching Standards

Iowa Teaching Standard and Criteria	Evidence to Support Concern

Step 2: Evaluator/Administrator Comments and Recommendation(s) Addressing the Concerns

___ Concern Resolved. Return to Tier 2 – Career Teacher.

___ Concern Not Resolved. Recommend to Tier 3 Intensive Assistance – Assistance Phase.

Step 3: Teacher Comments

Step 4: Signatures

Teacher Signature:

Date:

Evaluator/Administrator Signature:

Date:

Sample

Appendix 6c – Tier 3 Intensive Assistance

Assistance Phase – Plan of Assistance Form

Teacher:

Evaluator/Administrator:

Date:

Specific Concern – Iowa Teaching Standard	Plan (Method/Strategies) to Address Concern	Proposed Timeline	Indicators/Evidence of Progress	Resources/Support Needed

Establish Next Meeting Date to Review Progress:

Teacher Signature:

Date:

Evaluator/Administrator Signature:

Date:

Sample

Appendix 6d – Tier 3 Intensive Assistance

Assistance Phase – Plan of Assistance Progress Form

Teacher:

Evaluator/Administrator:

Date:

Specific Concern – Iowa Teaching Standard	Plan – Method/Strategies used to date.	Indicators/Evidence of Progress	Resources/Support Utilized to Date	Next Steps to Achieving Success

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Establish Next Meeting Date to Review Progress:

Teacher Signature:

Date:

Evaluator/Administrator Signature:

Date:

Sample

Appendix 6e – Tier 3 Intensive Assistance

Assistance Phase – Final Summary Form

Teacher:

Evaluator/Administrator:

Date:

Written Summary of Assistance Phase Plan Successes and Concerns

(Include specific evidence related to the Iowa Teaching Standards and Criteria collected throughout the Assistance Phase.)

What Iowa Teaching Standards and Criteria, if any, have not been met?

(Include specific evidence to make the determination.)

Future Considerations Regarding the Teacher's Practice

(Include specific concrete actions connected to the identified Iowa Teaching Standards and Criteria.)

Teacher Comments:

Evaluator/Administrator Comments:

Evaluator/Administrator Recommendation

- ☐ Concern Resolved. Return to Tier 2 Career Teacher.
- ☐ Progress Noted. Extend Assistance Plan Timeline. Develop and Implement a Revised Plan.
- ☐ Concerns Not Resolved. No Progress Noted. Recommend Non-renewal of Contract.

Teacher Signature:

Date:

Evaluator/Administrator Signature:

Date:

Sample

Appendix 7 – School Counselor Supplement (Aligning Iowa Teaching Standards to the ASCA Standards)

The supplement is not meant to supplant the Iowa Teaching Standards, as Iowa Code requires professional school counselors to be evaluated on the eight standards. The document is meant to support the evaluator and the counselor through the evaluation process. It should also be used as a reflective tool to support individual professional growth.

The Iowa School Counselor Association recommends that the school counselor and the evaluator collaboratively review the rubrics and determine a level of performance for each standard. The rubrics articulate the work of a professional school counselor and provide a pathway to continuous improvement.

[School Counselor Evaluation Supplement 2019](#)

Sample

Glossary

Administrator – Also referred to as “School Leader.” It is an individual holding a professional administrator license issued by the Board of Educational Examiners and is employed in a school district administrative position by a school district or area education. An administrator may be employed in both an administrative and a non-administrative position by a board of directors and considered a part-time administrator for the portion of time that the individual is employed in an administrative position.

[Ch 284A.2(2) Administrator Quality Program]

Artifact – Forms of evidence that support an educator’s evaluation. An artifact may include lesson plans, examples of student work with feedback, professional development plans, logs of contacts with families, examples of meeting agendas, notes from education collaboration time, etc. Besides documents, artifacts may include videos of practice, electronic portfolios, etc.

Assessment – The variety of methods or tools that educators use to evaluate, measure, and document the academic readiness, learning progress, skill acquisition, or educational needs of students. There are typically two types of assessments in education – formative and summative. Educators use formative assessments of student learning multiple times during a unit, course, or academic program. Formative assessment provide educators feedback about what students are learning or not learning so that instructional approaches, teaching materials, and academic support can be modified accordingly. Summative assessments evaluate student learning at the conclusion of a specific instructional period (e.g., end of a unit, course, semester, program, or school year). Summative assessments are scored and graded tests, assignments, or projects that are used to determine if learners are able to demonstrate knowledge and skills.

Assistance Phase – Assistance Phase follows the Awareness Phase when a teacher has been identified for Intensive Assistance. The phase includes a problem statement related to one or more of the Iowa Teaching Standards (Standards 1-7) and specific growth promoting goals that are measurable, action-oriented, realistic, and time-bound. The resulting plan needs to identify and apply strategies needed to achieve the goals, establishes reasonable timelines for strategic actions, and aligns specific criteria for evaluating the successful completion of the plan.

Awareness Phase – The evaluator identifies a problem relating to the Iowa Teaching Standards (only in Standards 1-7) that is characteristic of a teacher’s performance rather than anomaly. The evaluator contacts the teacher in writing, identifies the specific Iowa Teaching Standard(s) of concern, collaboratively develops a plan to resolve the problem, and schedules periodic meetings (not to exceed three months) with the teacher to discuss progress and potential barriers related to plan. The teacher remains in Tier 2 and works on the Individual Professional Development Plan. At the conclusion of plan, the evaluator reviews the progress and evidence to make one of the following recommendations:

The problem is resolved and the teacher is removed from the Awareness Phase and continues to work within Tier 2.

If the issue is not resolved, the teacher is notified in writing and placed into the Assistance Phase. Placement in the Assistance Phase suggests that activities regarding the Individual Professional Development Plan would be suspended at the recommendation of the evaluator.

Beginning Administrator – Beginning Administrator means an individual serving under an administrator license, issued by the board of educational examiners under chapter 272, who is assuming a position as a school district principal or superintendent for the first time.

[Ch 284A.2(2) Administrator Quality Program]

Beginning Teacher – Beginning teacher means an individual serving under an initial or intern license, issued under chapter 272, who is assuming a position as a teacher. “Beginning teacher” includes an individual who is an initial teacher. For purposes of the beginning teacher mentoring and induction program created pursuant to section 284.5, “beginning teacher” also includes preschool teachers who are licensed under chapter 272 and are employed by a school district or area education agency. “Beginning teacher” does not include a teacher whose employment with a school district or area education agency is probationary unless the teacher is serving under an initial or teacher intern license issued under chapter 272.

[Ch 284.2(1) Teacher Performance, Compensation, and Career Development]

Career Teacher – “Teacher” means an individual who holds a practitioner’s license issued under chapter 272, or a statement of professional recognition issued under chapter 272 who is employed in a nonadministrative position by a school district or area education agency pursuant to a contract issued by a board of directors under section 279.13. A teacher may be employed in both an administrative and a nonadministrative position by a board of directors and shall be considered a part-time teacher for the portion of time that the teacher is employed in a nonadministrative position.

[Ch 284.2(11) Teacher Performance, Compensation, and Career Development]

Coaching – A one-to-one conversation focused on the enhancing the learning and development by increasing self-awareness and a sense of personal responsibility. The coach facilitates the self-directed learning of the educator through questioning, active listening, and appropriate challenge in a supportive and encouraging climate.

Comprehensive Evaluation – A summative evaluation of a beginning teacher conducted by an evaluator for purposes of determining a beginning teacher’s level of competency relative to the Iowa teaching standards and for recommendation for licensure based and to determine whether the teacher’s practice meets the school district expectations for a career teacher. With respect to a beginning administrator, “comprehensive evaluation” means a summative evaluation of a beginning administrator conducted by an evaluator for purposes of determining a beginning administrator’s level of competency for recommendation for licensure based on the Iowa standards for school administrators.

[Ch 284.2(2) Teacher Performance, Compensation, and Career Development]

Comprehensive School Improvement Plan (CSIP) – The plan charts a course for improved student learning. Through CSIP development, districts and schools work collaboratively to review data, set goals, determine strategies or actions to accomplish goals, and evaluate the results. This process of continuous improvement focuses efforts on instructional improvement linked to student learning.

Content Knowledge – Refers to the body of knowledge and information that teachers teach and that students are expected to learn in a given subject or content area, such as English language arts, mathematics, science, or social studies. Content knowledge generally refers to the facts, concepts, theories, and principles that are taught and learned in specific academic courses.

Culture – The way in which educators work together and the set of beliefs, values, and assumptions they share.

Curriculum – The lessons and academic content taught in a school or in a specific course or program.

Data Point – The type of information or the what of the information. The examples of the different types of data points are endless but may include: teacher artifacts, achievement data, classroom observation summaries, video, survey data, etc.

Data Source – The origin of the data or who provided the data. Examples may include: principals or other administrators (e.g., superintendent, associate/assistant administrator, central office administrator, director, etc.), the person being evaluated, parents/guardians, students, other education professionals, etc.

Educator Quality – Efforts focused on educator preparation, mentoring and induction, educator evaluation, and continuous professional growth. These efforts are focused on achieving equity and excellence in education to ensure a knowledgeable and skilled educator workforce.

Ethics – A set of principles governing the conduct of all persons governed by the rules established by the Board of Educational Examiners. Details regarding ethical rules may be found [here](#).

Evaluator Approval Training – Training designed for administrators and other educators with evaluation responsibilities that leads to certification by Board of Education Examiners. It is aligned with the Iowa's professional educator standards, provides evaluators with the skills to conduct comprehensive evaluations and performance reviews as required by Iowa Code chapter 284, and provides for the evaluation of the progress made on individual professional development plans.

Evaluator – An administrator or other educator who successfully completes an evaluator training program.

[Ch 284.2(2) Teacher Performance, Compensation, and Career Development]

Evidence – Assessment or data measure used to determine progress towards an identified goal.

Feedback – Information about how an educator is doing in his/her efforts to reach a goal. Feedback should be meaningful, actionable, constructive, etc.

Formal Observation – Include a pre- and post-conference as an opportunity for an educator and an evaluator to have a conversation about the professional practice and student learning, to learn from each other and to adjust accordingly as a result of their conversation. Because these are scheduled and planned, both the educator and the evaluator have a scheduled time to talk about ongoing improvement to their professional practice.

Goal – An objective that an educator sets for himself or herself to achieve in a short-term or long-term. Principles of a quality goal are: clarity, challenge, commitment, feedback, and task complexity. SMART goals are goals which are specific, measurable, achievable, relevant, and time-bound.

Individual Educator Professional Development Plan – Promotes individual and collective professional development to support relevant Iowa Teaching Standards or the Iowa Standards for School Leaders and needs to be congruent with the district- and building-level professional development plans. The plan supports the student achievement goals of the attendance center and school district or area education agency and is developed by the educator in collaboration with the educator's evaluator

Informal Observation – Typically lasts anywhere from 10 minutes to a full class period. Informal observations can be announced or unannounced. These observations provide an administrator a glance at the teacher's daily practice. This is not a "gotcha" opportunity but rather a chance to

see the teacher in the daily routines of teaching. Feedback is often informal via notes to the teacher, emails, and brief conversations.

Initial Teacher License – A two-year license awarded at the completion of a full state of Iowa approved teacher preparation program for college semester hour credit including meeting at least one of our endorsement requirements. The license allows for full teaching instruction within grade levels and endorsements listed on the license. Also holds substitute authority including long-term subbing. Two renewals are available if needed. The second (and final) renewal requires proof of employment in a contracted position that will lead to the standard license. No credits required. Mandatory reporter training for child and dependent adult abuse is required.

Intensive Assistance Plan – A provision of organizational support and technical assistance to educators, other than beginning teachers, for the remediation of identified professional educator standard concerns for a period not to exceed 12 months.

Mentoring and Induction – Created to promote excellence in teaching or leading, enhance student achievement, build a supportive environment within school districts and area education agencies, increase the retention of promising beginning teachers or leaders, and promote the personal and professional well-being of the educator.

Model Descriptor – Depict behaviors of a career teacher that support the criteria for the Iowa Teaching Standards. The descriptors are examples that may be used to guide conversations during the evaluation process.

Multiple Measures – A variety of data points (i.e. lesson plans, professional development work, student work samples, parent communication, assessment data, etc.) from multiple sources (i.e. teacher, student, administrator, parents, community, etc.) to evidence professional growth and/or proficiency.

Observation – One source of evidence informing the evaluation. Observations may be announced (scheduled in advance, possibly with a pre- and/or post-observation conference) or unannounced; formal (lengthy and with conferences) or informal (short and impromptu). Observations are carried out by the educator's evaluator, who looks for evidence related to the professional educator standards.

Peer Review – Incorporates continuous feedback loops focused on improving instructional practices with a focus on individualized coaching and support. It is also engaging educators in self- and peer-reflections and involves authentic and open discussions about the professional educational practices. Confidentiality is maintained between the reviewer, the teacher, and the administrator. A peer review involves multiple authentic sources of data - classroom visits, review of course materials, a balanced inclusion of student outcomes, and incorporates the teacher's professional development plan for edits, revisions, or updates.

Performance Review – A summative evaluation of a career educator (teacher or school administrator) and used to determine whether the educator's practice meets school district expectations and the respective professional educator standards, and to determine whether the educator's practice meets school district expectations for career advancement.

[Ch 284.2(2) Teacher Performance, Compensation, and Career Development]

Portfolio – Portfolios provide documented evidence of an educator's practice from a variety of sources—not just student ratings—and provide context for that evidence. The process of selecting and organizing material for a portfolio can help one reflect on and improve one's

professional practice. Portfolios are a step toward a more public, professional view of education as a scholarly activity. It can offer a look at development over time, helping one see education as an ongoing process of inquiry, experimentation, and reflection. Educator portfolios capture evidence of one's entire professional career, in contrast to what are called course portfolios that capture evidence related to a single course.

Post-observation Conference – A conference that takes place after a formal observation during which the evaluator provides feedback verbally and in writing to the educator.

Pre-observation Conference – A conference that takes place before a formal observation during which the evaluator and teacher discuss important elements of the lesson or class that might be relevant to the observation.

Professional Development – Also referred to as professional learning within an area education agency or local district that is aligned with the state standards for teaching, leading, and learning and aligned to the standards for professional development. Professional learning increases educator effectiveness and results for all students when it: Occurs within learning communities committed to continuous improvement, collective responsibility, and goal alignment.; Requires skillful leaders to develop capacity, advocate, and create support systems for professional learning.; Prioritizes, monitors, and coordinates resources for educator learning.; Uses a variety of sources and types of student, educator, and system data to plan, assess, and evaluate effectiveness of instruction.; Integrates theories, research, and models of human learning to achieve intended outcomes.; Applies research on change and sustains support for implementation of professional learning for long-term change.; Aligns its outcomes with educator performance and student curriculum standards.

[281—83.6(1) Professional development for school districts, area education agencies, and attendance centers]

Professional Educator Standards – Refers to the Iowa Teaching Standards and Criteria and/or the Iowa Standards for School Leaders.

Professional Learning Community (PLC) – A group of educators that meets regularly, shares expertise, and works collaboratively to improve educator knowledge, skills, and the academic performance of students. The small group collaboration is often used as a form of professional development. The PLC has two broad purposes: improving the skills and knowledge of educators through collaborative study, expertise exchange, and professional dialogue, and improving the educational aspirations, achievement, and attainment of students through stronger leadership and teaching.

Self-assessment – The process of making judgments about the appropriateness or effectiveness of an educator's knowledge, performance, beliefs, products, or effects, so that they can be improved or refined.

Student Performance Data – Any information that educators, schools, districts, and state agencies collect on individual students, including data such as personal information (e.g., a student's age, gender, race, place of residence), enrollment information (e.g., the school a student attends, a student's current grade level and years of attendance, the number of days a student was absent), academic information (e.g., the courses a student completed, the test scores and grades a student earned, the academic requirements a student has fulfilled), and various other forms of data collected and used by educators and educational institutions (e.g., information related to disciplinary problems, learning disabilities, medical and health issues, etc.).

Summative Conference – See “performance review.”

Teacher – An individual holding a practitioner’s license or a statement of professional recognition issued by the Board of Educational Examiners, who is employed in a non-administrative position by a school district or area education agency pursuant to a contract issued by a board of directors. A teacher may be employed in both an administrative and a non-administrative position by a board of directors and considered a part-time teacher for the portion of time that the teacher is employed in a non-administrative position.

[Ch 284.2(2) Teacher Performance, Compensation, and Career Development]

Teacher Effectiveness – The following qualities have been found as important attributes in defining teacher effectiveness – Demonstrate strong content knowledge pedagogy and skill in implementing productive teaching practices.; Understand all learners and how they develop, including students who have learning differences and students becoming skilled in language and content who are not already proficient.; Organize and explain ideas, as well as observe and reason in an effort to readily detect student successes and struggles.; Adapt instructional delivery in a given context in effort to respond to student needs.; Collaborate with colleagues, parents, and community to achieve individual professional goals and the goals of the school and district.; Strive to engage in continuous professional growth.

[Darling-Hammond, L. Getting teacher evaluation right: What really matters for effectiveness and improvement. 2013. Page 10.]

Teacher Quality Committee – The committee is subject to the requirements of the Iowa open meetings law. To the extent possible, committee membership shall have balanced representation with regard to gender. The committee is responsible for the following: Monitor the implementation of the requirements of statutes and administrative code related to Educator Quality legislation.; Monitor the evaluation requirements to ensure evaluations are conducted in a fair and consistent manner throughout the school district or agency. The committee develops model evidence for the Iowa teaching standards and criteria. The model evidence will determine which standards and criteria can be met through observation and which evidence meets multiple standards and criteria.; Determine the use and distribution of the professional development funds distributed to the school district or agency based upon school district or agency, attendance center, and individual teacher professional development plans.; Monitor the professional development in each attendance center to ensure that the professional development meets school district or agency, attendance center, and individual teacher professional development plans.; Determine the compensation for teachers on the committee for work responsibilities required beyond the normal workday.

[281—83.7 Teacher quality committee]

Tier 1 – Designed for the beginning teacher. Tier 1 generates multiple, usable, and reliable pieces of evidence that will support deciding to recommend a beginning teacher for a standard teaching license. The purpose of the tier is to build an understanding of and demonstrate the Iowa Teaching Standards. It involves mentoring and induction; collecting evidence related to the Iowa Teaching Standards; conducting regular observations and feedback by a trained evaluator; and leading comprehensive evaluation to determine licensure.

Tier 2 – Designed for career teachers who demonstrate competence in the Iowa Teaching Standards. It promotes ongoing professional growth and continuous implementation of the Iowa Teaching Standards. Tier 2 involves continuous review and documentation of evidence to support performance review every 3-years; collaborative development of an individual professional

development plan; and ongoing reflection and feedback on the individual professional development plan.

Tier 3 – Designed for career teachers deficient in one or more Iowa Teaching Standards. It provides a teacher an opportunity to seek assistance in meeting the Iowa Teaching Standards and provides a structured process for supporting and directing the assistance. Tier 3 involves two phases – awareness and assistance. The evaluator and identified teacher develop and implement professional assistance plan for no longer than 12 months and engages in ongoing evaluation of and feedback regarding the plan.

Sample

Appendix H: 18.1. Proposed Governing Bylaws.

Included below

- Draft Governing Bylaws

BYLAWS

OF

The Sample Foundation, INC.
An Iowa Nonprofit Corporation

ARTICLE 1 OFFICES

The corporation's principal office shall be fixed and located at such place within the boundaries of Iowa, as the Board of Directors ("Board") shall determine. The Board is granted full power and authority to change the principal office from one location to another.

ARTICLE 2 PURPOSE

The specific and general purposes of the corporation are described in the Articles of Incorporation.

ARTICLE 3 NO MEMBERS

Section 3.1 No Members

The corporation shall have no members. Any action, which would otherwise; by law require approval by a majority of all members or approval by the members shall require only approval of the Board. All rights, which would otherwise by law vest in the members, shall vest in the board.

ARTICLE 4 DIRECTORS

Section 4.1 General Powers

Subject to the limitations of the Iowa not-for-profit corporation law, the corporation's Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may engage the services of a management company with respect to certain of the operations of the corporation, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may, subject to contractual obligations as may exist, rescind any such assignment, referral or delegation at any time.

Section 4.2 Specific Powers

Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

- a. To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; and to fix their compensation;
- b. To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefore which are not inconsistent with the law, the corporation's Articles of Incorporation or these Bylaws, as it deems best;
- c. To adopt, make and use a corporate seal and to alter the form of the seal from time to time, as it deems best;
- d. To borrow money and incur indebtedness for the purpose of the corporation, and to cause to be executed and delivered therefore, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecation's and other evidences of debt and securities therefore;
- e. To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust;
- f. To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property;
- g. To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose;
- h. To form and be a member or shareholder of a not-for-profit entity organized under the law of any state, or to form without members or shareholders a not-for-profit entity organized under the law of any state, for the purposes of education, education or other research, or support of education or education research; and
- i. To carry out such other duties as are described in the Charter or Articles or Incorporation.

Section 4.3 Number, Election and Term of Directors and Related Matters

- a. The authorized number of Directors shall be no less than three (3) and no greater than eleven (11) until changed by amendment of these Bylaws.
- b. Those Directors who are to be elected by the Board of Directors shall be so elected at the annual meeting of the Board of Directors then in the office. Only existing members of the Board of Directors may nominate candidates for new Directors. Notice of the Board's intention to elect a Director shall be included in the agenda for that meeting of the Board and shall be publicly announced.
- c. Each member of the Board of Directors shall have a term of five years, and may be re-elected for up to 3 consecutive terms.

- d. Directors shall be elected at a duly held meeting of the Board of Directors.
- e. The Board shall include at least one member who is the parent of a child enrolled in a school operated by the corporation and at least one member who is or has been a professional educator and/or school administrator, having experience in education. The Board should endeavor to be comprised of a diverse group of accomplished professional, academic, business, and/or civic minded individuals who are committed to the mission of the corporation.
- f. Persons who are employed by, or are principals of, either a sponsor or a management company for the corporation are not eligible and shall not be elected to serve on the Board so as to avoid potential conflicts of interest. The Board will seek to avoid filling future vacancies on the Board with persons who are employed by schools which are managed by the same company that manages schools operated by the corporation. However, if the corporation does not have a professional educator or administrator on its Board and if the application process described in Section 4.5 does not produce such an applicant for the Board, then the Board may consider and select as a Director an educator or administrator employed by the same company that manages schools operated by the corporation.
- g. The Board shall invite every Director who has successfully completed their term as Director, to participate in a group of Emeritus Directors. Emeritus Directors are invited to attend Board meetings and other Sample Foundation Inc. functions, provide advice and counsel to the Board, but shall have no voting power.
- h. Directors must be fingerprinted within thirty (30) days of their appointment.

Section 4.4 Resignation and Removal

Any Director may resign effective upon giving written notice to the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be selected (by the existing president) before such time, to take office when the resignation becomes effective. A Director may be removed without cause by a majority of the Directors then in office.

Section 4.5 Vacancies

- a. A Board vacancy or vacancies shall be deemed to exist if any Director dies, resigns, or is removed, or if the authorized number of Directors is increased.
- b. The Board may declare vacant the office of any Director who has been convicted of a felony, or whose fingerprint check results reveal non-compliance with standards of good moral character.
- c. In order to elect a new Director, the Board shall announce the vacancy to the public, including The Sample Foundation Inc. parents, teachers, and schools, and invite applications from qualified persons all as described by the Board. The

- Chairman or another Board member approved by the Board, shall conduct an initial review and evaluation of all applications and report to the Board by way of nomination of candidates. Board members are encouraged to solicit applications from qualified persons. Following review and discussion of the candidates, the Board will proceed to elect any new Director.
- d. New Directors shall be elected by a vote of the majority of the existing Directors although less than a quorum. Each Director so elected shall hold office until a successor has been appointed and qualified.
 - e. No reduction of the authorized number of Directors shall have the effect of removing any Director prior to the expiration of the Director's term of office.
 - f. The Board shall nominate and elect its Chairman at a duly noticed meeting of the Board. The Chairman shall serve for a term of one year and may seek re-election as Chairman at the end of any term. The Chairman shall also serve as the President of The Sample Foundation Inc. for as long as he or she serves as Chairman.
 - g. The Board shall nominate and elect a Vice-Chairman at a duly noticed meeting of the Board. The Vice-Chairman shall serve for a term of one year and may seek re-election as Vice-Chairman at the end of any term.
 - h. The Board shall develop an orientation and training program for new Directors and an annual continuing education program for existing Directors.

Section 4.6 Place/Notice of Meetings/Compliance with Applicable Laws

Meetings of the Board may be held at the principal office of the corporation or at any other place that has been designated in the notice of the meeting or by resolution of the Board. Appropriate notices of the meeting complying with Iowa law shall be timely posted or published as required by law, and all meetings shall be held and conducted in accordance with applicable open or public meetings laws. The public, any board member or officer of the corporation shall place any desired item on the agenda of any board meeting by notifying, in writing, no later than 5 (five) business days prior to the scheduled board meeting, a description of the item to be placed in the agenda and said descriptions shall be delivered to the then acting secretary of the corporation.

Section 4.7 Annual Meetings

The Board shall hold an annual meeting for the purposes of organization, selection of Directors and officers, and the transaction of other business.

Section 4.8 Quarterly Meetings

Quarterly meetings of the Board, shall be held on such dates and at such times and places as may be from time to time fixed and notified by the Board.

Section 4.9 Special Meetings

- a. Special meetings of the Board for any purpose(s) may be called at any time by the Chairman of the Board, if there is such an officer, the President, or the Secretary.

- b. Special meetings of the Board may be held after each Director has received notice by mail, telecopy, e-mail or telephone.
- c. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.

Section 4.10 Quorum and Voting

One half (1/2) of the authorized Directors then in the office shall constitute a quorum. The Board shall attempt to reach a general consensus on all actions before the Board; provided, however, that every act or decision done or made by a majority of the Directors present at a meeting duly held at which a quorum is present is an act of the Board. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Directors, if any action taken is approved by at least a majority of the required quorum for such meeting.

Section 4.11 Waiver of Notices

Notice of meeting need not be given to any Director who signs a waiver of notice, a written consent to the holding of the meeting, an approval of the minutes of the meeting, whether before or after the meeting, or who attends the meeting without protesting the lack of notice prior thereto or at its commencement. All such waivers, consents and approvals shall be filed with the corporate records or made a part of the minutes of the meetings.

Section 4.12 Adjournment

A majority of the Directors present, whether or not a quorum is present, may adjourn any Director's meeting to another time and place. If a meeting is adjourned for more than twenty-four (24) hours, notice of such adjournment to another time or place shall be given, prior to the time scheduled for the continuation of the meeting, to the Directors who were not present at the time of the adjournment.

Section 4.13 Rights of Inspection

Every Director has the absolute right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the corporation provided such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the corporation's obligations to maintain the confidentiality of certain books, records and documents under any applicable federal, state or local law.

Section 4.15 Fees and Compensation

Directors shall not receive compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the corporation's business. The corporation shall carry liability insurance covering the Director's and officers of the corporation as described on the Charter on the conduct of the corporation's business.

Section 4.16 Standard of Care

- a. A Director shall perform all duties of a Director in good faith, in a manner such Director believes to be in the best interests of the corporation and with such care, including the duty to make all reasonable inquiries, as an ordinarily prudent person in a like situation would use under similar circumstances.
- b. In performing the duties of a Director, a Director may rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:
 1. One or more officers or employees of the corporation whom the Director believes to be reliable and competent in the matters presented;
 2. Legal counsel, independent accountants or other persons as to matters that the Director believes to be within such person's professional or expert competence; or
 3. A committee of the Board upon which the Director does not serve as to matters within a designated authority, provided the Director believes that the committee merits confidence and the Director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

ARTICLE 5 OFFICERS

Section 5.1 Officers

The officers of the corporation shall be Chair, Vice Chair, Secretary, and President, each of whom shall be appointed by the Board. The corporation may also have, at the discretion of the Board, a Treasurer and Vice-President, and such other officers and assistant officers as may be elected or appointed by the Board. Any number of offices may be held by the same person, except that the Chair may not also serve as President of the Corporation. Unless otherwise stated, officers need not be a director, or a member of the governing board, in order to hold an office. An officer who does not also serve as a director or a member of the governing board, is not subject to the prohibition against receiving fees or compensation for services rendered to the Corporation.

5.1.1 Chair

The Chair shall be elected by the Board of Directors of The Sample Foundation, Inc., at its annual meeting. The Chair may be removed from office as Chair without cause at any time upon an affirmative vote of a majority of the Directors of The Sample Foundation Inc.:

- a. The Chair shall be the presiding officer at all meetings of The Sample Foundation Inc., and shall have general signatory authority for the Board.
- b. The Chair shall appoint all of the chairs of committees and all members of all committees, subject to the approval or ratification of The Sample Foundation Inc., All such committee chairs and members of committees shall serve at the pleasure of the Chair and the Chair may remove the chair(s) of any such committee and any committee member, without cause at any time.
- c. The Chair shall serve as a nonvoting, ex officio member of all committees, and

the presence of the Chair may count as quorum at any committee meeting.

5.1.2 Vice-Chair

The Vice- Chair of The Sample Foundation Inc., shall be elected by the Board of Directors of The Sample Foundation Inc., at its annual meeting. The Vice- Chair may be removed from office as Vice-Chair without cause at any time upon an affirmative vote of a majority of the Directors of The Sample Foundation Inc.,

- a. The Vice-Chair shall act in the place and stead of the Chair in the event of the Chair's absence, inability, or refusal to act, and shall have signatory authority in the event the Chair is absent or otherwise unavailable. The Vice Chair shall be the presiding officer at any meeting when the Chair is absent or otherwise unavailable.
- b. In the event that the office of the Chair is vacant, the Vice Chair shall assume the duties and powers of the Chair until such time as the office of the Chair is no longer vacant.
- c. The Vice-Chair shall have such other powers and perform such other duties as the Board may prescribe from time to time.

5.1.3 Secretary

- a. The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, including the following information for all such meetings; the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of those present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, a principal office in the State of Iowa, the original or a copy of the corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all directors and their respective addresses. The Secretary shall keep the seal of the corporation and shall affix the same on such papers and instruments as may be required in the regular course of business, but failure to affix it shall not affect the validity of any instrument.
- b. The Secretary shall give, or cause to be given, notice of all meetings of the Board and any committees thereof required by these Bylaws or by law to be given, and shall distribute the minutes of meetings of the Board to all its members promptly after the meetings; shall keep the seal of the corporation in safe custody; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the Treasurer; and shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.
- c. The Secretary of the corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Director.

5.1.4 President

The Board may hire a President who shall not be a Director and as such, shall be a non-voting position. The President shall not be a member of the Governing Board. The President is the general manager and chief executive officer of the corporation and has, subject to the control of the Board, general supervision, direction and control of the business and officers of the corporation. The President shall report as directed to the Board at each meeting. The President has the general management powers and duties usually vested in the office of the President and general manager of a corporation as well as such other powers and duties as the Board may prescribe from time to time.

5.1.5 Vice President

The Board may hire a Vice President who shall not be a Director, and as such, shall be a non-voting position. The Vice-President, if any, shall act in the place and stead of the President in the event of the President's absence, inability, or refusal to act. The Vice-President shall have such other powers and perform such other duties as the Board and the President may prescribe from time to time.

5.1.6 Treasurer

The Treasurer, if any, shall insure or cause to be insured, that a true and accurate accounting of the financial transactions of the Corporation is made and that such accounting is presented to and made available to the Board. The Treasurer, if any, shall perform such other duties as may be prescribed by the Board.

Section 5.2 Election

The officers of the corporation, shall be chosen by the Board at each biennium, or as provided above, and shall serve at the pleasure of the Board, and shall hold their respective offices until their resignation, removal or other disqualification from service, or until their respective successors shall be elected.

Section 5.3 Subordinate Officers

The Board may elect, and may empower the Chair to appoint, such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in these Bylaws or as the Board may from time to time determine.

Section 5.4 Removal

Any officer may be removed, either with or without cause, by the Board at any time or, except for an officer chosen by the Board, by any officer upon whom the Board may confer such power of removal. Any such removal shall be without prejudice to the rights, if any, of an officer under any contract of employment.

Section 5.5 Resignation

Any officer may resign at any time by giving written notice to the Board; such resignation may not prejudice the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the

receipt of such notice or at any later time specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Section 5.6 Vacancies

A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular election or appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

Section 5.7 Salaries

Each officer, who is not otherwise a Director or a member of the Governing Board, may be paid a reasonable salary, as may from time to time be determined by action of the Board. No such payment shall preclude any officer from serving the Corporation in any other capacity and receiving compensation for such services.

ARTICLE 6 COMMITTEES

Section 6.1 Board Committees

The Board may, by resolution adopted by a majority of the Directors then in office, provided that a quorum is present, create one or more standing or ad hoc committees, each consisting of at least two (2) members of the Board, to serve at the pleasure of the Board.

Section 6.2 Local Governing Body Committees

The Board by resolution or by amendment to these bylaws may create and adopt bylaws for one or more committees comprised of such persons as are named or specified in the adopted bylaws for the operation of one or more public charter schools under the laws of one or more states (each, a "Local Board"), all of whom shall serve at the pleasure of the Board, and may be removed by the Board from such local board, having such powers and responsibilities as are set forth in such bylaws or resolution.

ARTICLE 7 OTHER PROVISIONS

Section 7.1 Validity of Instrument

Subject to the provision of applicable law, any note, mortgage, evidence of indebtedness, contract, conveyance or other written instrument and any assignment or endorsement thereof executed or entered into between the corporation and any other person, shall be valid and binding on the corporation when signed by the President or any Vice President and the Secretary or Treasurer of the corporation, unless the other person has actual knowledge that the signing officers has no authority to execute the same. Any such instruments may also be signed by the Board Chair, or in the absence of the Chair, the Vice-Chair, or any other designated member of the Board.

Section 7.2 Construction and Definitions

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Nonprofit Corporation Law of the State of Iowa shall govern

the construction of these Bylaws. Without limiting the generality of 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 the corporation and a natural 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 provision.

Section 7.3 Fiscal Year

The fiscal year of the corporation shall be set by the Board.

Section 7.4 Conflict of Interest

Any Director, officer, key employee, or committee member having an interest in a contract or other transaction presented to the Board or a committee thereof 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 adverse to the corporation’s interest.

Section 7.5 Interpretation of Articles of Incorporation

In any instance in which the provisions of these Bylaws are in conflict with the provisions of the Articles of Incorporation, the provisions of these Bylaws shall control.

ARTICLE 8 AMENDMENTS

Section 8.1 Bylaws

These bylaws may be adopted or these Bylaws may be amended or repealed by a majority vote of the Board of Directors.

CERTIFICATE OF ADOPTION OF BYLAWS

I certify that I am the elected and acting Secretary of The Sample Foundation, Inc., an Iowa nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors.

SECRETARY

Appendix I: 23.1.1. Fundraising.

N/A

Appendix J: 24.2. Evidence of Prior Student Success.

Included below

- Evidence of Prior Student Success from Academica and Opportunity Education

Evidence of Serving Similar Student Populations

Academica-supported schools use a multi-tiered organizational network of management that facilitates cooperation, empowerment, and innovation among the schools and all its stakeholders. While serving a predominately minority and low-income student population, this network of charter schools has traditionally outperformed the government run public schools in their respective school districts. These schools have been recognized at the local, state, and national levels for their achievements. Academica supports 20 National Blue Ribbon Schools: Somerset Academy Silver Palms (2021), Somerset Academy Miramar South (2020), Somerset Academy South Miami Middle (2020), Somerset Academy Elementary Miramar (2018), Somerset Academy Davie (2011 & 2017), Somerset Arts Conservatory (2016), Mater Academy East Charter School (2010 & 2019), Mater Gardens Academy (2014), Mater Performing Arts & Entertainment Academy (2015), Mater Academy East Charter Middle School (2019), Pinecrest Academy Inspirada (2021), Pinecrest Academy North (2019), Doral Academy of Technology (2017 & 2023), Doral Academy Charter Middle School (2015), Doral Performing Arts & Entertainment Academy (2014), International Studies Charter Middle School (2017), and International Studies Charter High School (2015).

Recently released by Education Cities, in collaboration with GreatSchools, the Education Equality Index (EEI) report ranks Hialeah No. 1 and Miami No. 3 among Top-10 U.S. Cities closing the Achievement Gap, or reducing the educational divide between students from low-income families and their more advantaged peers. A total of 14 charter schools from the two cities appear on the list of 20, and 12 of those are serviced by Academica.

Stanford University's Center for Research on Education Outcomes (CREDO) identified the Academica supported "hybrid" school networks among the highest achieving. Some 75% of all 'hybrid' charter schools in the US identified by Stanford are supported by Academica. The same Stanford study found that 'hybrid' charter schools have the effect of approximately 100 additional days of learning across critical subjects like reading and math, compared to traditional public schools. Hispanic students at 'hybrid' schools, essentially all at Academica schools, displayed growth in reading equal to or significantly stronger than their white traditional public school peers. The schools receiving educational support services from Academica are either already fully accredited by Cognia, under renewal, or currently undergoing accreditation. Although accreditation is a requirement only at the high school level to ensure students will meet the entrance requirements for colleges and universities, Academica's experience and commitment to the accreditation process has enabled all Academica-supported schools, albeit elementary, middle, and/or high school, to pursue and obtain accreditation.



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CENTER FOR RESEARCH ON EDUCATION OUTCOMES

Charter Management Organizations 2017

Charter Management Organizations

2017

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CREDO, the Center for Research on Education Outcomes at Stanford University, was established to improve empirical evidence about education reform and student performance at the primary and secondary levels. CREDO at Stanford University supports education organizations and policymakers in using reliable research and program evaluation to assess the performance of education initiatives. CREDO's valuable insight helps educators and policymakers strengthen their focus on the results from innovative programs, curricula, policies and accountability practices.

Acknowledgments

CREDO gratefully acknowledges the support of the state education agencies and school districts which contributed their data to this partnership. Our data access partnerships form the foundation of CREDO's work, without which studies like this would be impossible. We strive daily to justify the confidence you have placed in us.

CREDO also acknowledges the support of the Walton Family Foundation and Fisher Fund for this research.

Disclaimers

The views expressed herein do not necessarily represent the positions or policies of the organizations noted above. No official endorsement of any product, commodity, service or enterprise mentioned in this publication is intended or should be inferred. The analysis and conclusions contained herein are exclusively those of the authors and are not endorsed by any of CREDO's supporting organizations, their governing boards or the state governments, state education departments or school districts that participated in this study.

This research result used data collected and maintained by the Michigan Department of Education (MDE) and/or Michigan's Center for Educational Performance and Information (CEPI). Results, information and opinions solely represent the analysis, information and opinions of the author(s) and are not endorsed by, or reflect the views or positions of, grantors, MDE and CEPI or any employee thereof.

The research presented here utilizes confidential data from the Rhode Island Department of Education. The views expressed here are those of the author(s) and do not necessarily represent those of RIDE or other data contributors. Any error is attributable to the author(s).

The conclusions of this research do not necessarily reflect the opinions or official positions of the Texas Education Agency, the Texas Higher Education Coordinating Board or the State of Texas.

Data for this report were provided by the Missouri Department of Education.

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List of Acronyms & Definitions

Brick-and-Mortar schools	A public school which uses standard in-person learning as its primary means of curriculum delivery
CMOs	Charter School Management Organizations – To qualify as a CMO, an organization must oversee the operation of at least three charter schools. Further, the CMO must be the charter holder for all of the schools operated by the CMO.
CREDO	Center for Research on Education Outcomes
EOC	End-of-Course Exam
ELA	English Language Arts
ELLs	English Language Learners
FERPA	Family Education Records Privacy Act
Growth	The year-to-year change in academic performance relative to one's peers. Growth can be positive or negative.
NAEP	National Assessment of Educational Progress
Network	A network is defined as a single organization which oversees the operation of at least three charter schools.
Online charter	A public school operated under a charter as defined by the state which uses online learning as its primary means of curriculum delivery
Online School	A school which offers a full-time online curriculum to the majority of its students
TPS	Traditional Public School
VCR	Virtual Control Record
VOSs	Vender Operated Schools – To qualify as a VOS, an organization must oversee the operation of at least three schools. However, the VOS is not the holder of the charters for the schools to which they provide services. Rather the VOS is hired by the school's charter holder to provide services to the school. These services can range from merely providing administrative services to the full operation of the school. The schools operated by a VOS can be independent charter schools or may also belong to a CMO. While rare, VOSs are occasionally hired to operate traditional public schools. Data from TPS are not included in this study.

Charter Management Organizations 2017

1. Introduction

Purpose of Study

In 2013, the Center for Research on Education Outcomes (CREDO) released the Charter School Growth and Replication (CGAR) study (Woodworth and Raymond 2013). The study examined the lifecycle of charter school networks from founding of the flagship school to development and eventual expansion of the network. Volume II of the CGAR study focused on the performance of charter school networks, organizations which operate at least three charter schools. This report is an update to CGAR Volume II. We examine the performance of charter networks compared to traditional public schools (TPS) and independent charter schools. A chief focus of this study is the management arrangement of the school and the impact it has on the school's performance, as measured by student academic progress. Additional analyses explore the variation in performance across networks and performance by state.

Need for the Study

Within the limits of each state's charter school law, charter school operators have discretion to decide how their school is managed. Two-thirds of American charter schools exist as single independent nonprofit organizations. However, twenty percent of charter school operators have elected to operate multiple schools. The existence of large networks of charter schools has the potential to spread proven, effective practices across a larger portion of the community. However, proof of positive student impacts is not always a requirement for expanding from a single school to a charter network.

TYPES OF CHARTERS

This report identifies four groups of charter schools in the United States.

1. Charter Management Organizations (CMOs)
2. Vender Operated Schools (VOSs)
3. Hybrid charter schools
4. Independent charters

The side bars below will describe each type of charter school in greater detail.

Each state has different policies in place for if and how charter school operators are allowed to expand beyond single schools. This study undertakes an exploration into the student growth outcomes of the charter networks operating schools in 24 states, New York City,¹ and Washington, D.C.

It is important at the outset to identify and define the types of organizations that are included in this study. The concept of a single independent non-profit school is straightforward. The schools are sometimes referred to as “singletons” or “Mom and Pop” charter schools to reflect their commitment to remaining a single school.

Charter Management Organizations (CMOs) is a term that covers organizations that hold the charter for multiple schools. There are a small number of operators that we include in the CMO group that often are labeled elsewhere as Education Management Organizations (EMOs) because they operate as for-profit entities. For our purposes, the deciding factors for inclusion as a CMO group are that the CMO holds the charters for their schools and have direct control of school operations.

Vendor Operated Schools (VOSs) are a form of education service provider that supports multiple schools on a contracted basis. They do not hold the charters for the schools they serve and are engaged for a specific period. We use the term VOS to distinguish the management relationship between the service provider and the governing body of the charter school. Some VOSs are non-profit organizations, while the majority are profit seeking.

Independent

Independent charter schools are standalone charter operations. The charter holding organization may run the school directly or they may contract with an organization which provides services to only one or two charter schools. The major distinction is that independent charter schools are not part of a larger organization. They are typically the “Mom and Pop” type of charter school. The majority (68 percent) of charter school students attend an independent charter school.

CMO

Many researchers and policymakers use the term CMO, but the definition differs from report to report. Our definition of a CMO in this study differs from some other organizations’ reports. **For this report, a CMO is an organization which operates at least three separate charter schools, and the CMO is the charter holder for each school.** In a CMO, the organization will control every aspect of the schools’ operations, including curriculum, personnel policies, operating policies and finances. The critical feature is the direct control of operations. In this study, the designation of CMO can be applied to non-profit or for-profit operators. For example, Achievement First is a non-profit CMO while Constellation Schools is a for-profit CMO.

¹ For purposes of this analysis, we treat New York City as a separate state from the rest of New York. This is because New York City has policies which differ from those of the rest of the state and the large number of charter students in New York City would hide differential results from the rest of New York State.

A final group of charter school networks, called “Hybrids”, deserve a special designation by virtue of their unusual constellations of organizations.

It is also useful to be clear about the organizations that were excluded from the study. Organizations which contract with charter schools to provide only a small portion of operations, such as physical therapy or speech therapy, are not classified as CMO/VOS organizations. These types of contract services do not involve the management and operation of the school overall.

In addition to independent charter schools and charter networks, we will also examine the operations of super networks. Super networks are large charter networks which usually span across large physical areas and often include multiple states. These super networks usually consist of multiple regional-level organizations which operate as separate CMOs/VOSs but have an overarching national management organization. A network may also be classified as a super network if it operates multiple “brands” of charter schools. One of the best known super networks is the KIPP network of schools. Each KIPP regional cluster has operational policies which are tailored to the specific needs of students in that region. While the KIPP regional networks are managed somewhat independently from each other, they must still operate within the expectations of the central national organization.

VOS

A VOS is an organization which provides services under contract to at least three separate charter schools, but do not hold the charter for any school they serve. To qualify for inclusion in this category, VOS’s provided services to no more than two schools from the same charter holder. (Those serving more than three schools from the same provider are included in “Hybrid”.) A VOS may provide a wide range of services to its charter schools. In some cases, the VOS is responsible for the entire operation of the school. In others, the VOS may be responsible for only selected aspects of the school’s operations such as back-office support, curriculum or staffing. Importantly, a VOS must answer to the school’s charter holder in addition to authorizers and state governance. The school and the VOS can part ways and the school could still exist. With a CMO, if the CMO stops operating the school, the school ceases to exist. VOS can be for-profit or non-profit. Innovative Education Management is an example of a non-profit VOS. Global Educational Experience is a for-profit.

Hybrid

As the name suggests, hybrid charter schools have aspects of both a CMO and a VOS. One example of a Hybrid charter is the Chicago International Charter Schools (CICS). CICS holds the charters for its schools like a CMO, but the CICS organization contracts out the operation of the schools to multiple VOS organizations, thereby acting as a portfolio manager. In other cases, the contractual relationship between the CMO and VOS extends over many, if not all, of the CMOs schools and may have other strategic purposes. For Hybrid charter schools, the CMO or the VOS or both entities may be for-profit organizations. These types of charter schools are rare. Only 1 percent of all charter schools are Hybrid charter schools.

Questions to Be Addressed

The overarching question of this analysis is, “Do schools which are part of a larger management structure create student academic growth that is different from that seen in independent charter schools?” The outcome we examine is the one-year academic progress of students. The research variable of interest is the management approach represented by the various organizational configurations. We seek insight into the advantages of scale (multiple schools versus single school operation) and the benefits of direct or indirect control of school operations (CMOs versus VOSs). We also examine whether the profit status of either the CMO or the VOS affects the academic gains that students make.

By using more nuanced analyses, we can tease out much more detail about which students have better outcomes from different management structures. For some subpopulations, network benefits from economies of scale in services, personnel or facilities may lead to improved or weaker academic growth when compared to their peers. To this end, the report includes breakout analyses by student racial/ethnic subpopulations, English language learners, students in poverty and students receiving special education services.

Inclusion in a charter network may also affect schools differently based on the characteristics of the schools. In this study, we look at the academic growth of students attending new charter schools to determine if students attending new schools in a charter network have different growth from students in new charters which are not part of a network. We also include an analysis of full-time online charter schools in a network compared to brick-and-mortar schools and nonprofit vs. for-profit networks.

As in the earlier report, we again examine and report on the average student academic growth by network.

2. Methods and Data

Classifying Network Schools

For the 2013 CGAR study, CREDO created a database of charter schools showing which were affiliated with various charter networks. For this study, we have updated that database to include new schools and new networks which have opened in recent years. To identify network schools, CREDO uses a variety of data sources. Some state departments of education include information on their websites which identify schools having an affiliation to specific networks. Additionally, most of the networks have some level of web presence which lists the schools included in the network. CREDO also received lists of charter schools and networks from state charter organizations when available. Finally, many network organizations brand their schools with the network name. All of these factors allow CREDO to maintain a list of charter school and network organization affiliations.

This study contains data for 3.7 million student observations across 26 states. We identify 240 CMOs and 54 VOSs operating within the states included in the data set. The large size of the data set provides ample statistical power to detect even small effects at the national level. Readers should keep in mind, however, that these findings come from a wide variety of schools and settings. Overall national numbers should not be assumed to hold at every charter school. In fact, the variation in charter school performance is one of the major findings of this study. Additionally, every student should not be assumed to have the same experience as the average. A complete count of students by state and students by network will be included in the data appendix of this report.

For this analysis we use academic growth, which is defined as the change in relative student scores from one testing period to the next. This is generally from spring to next spring. Due to shifting testing patterns over the last several years, not all states tested every year. Table 1 shows the tested years used to compute each growth period. In cases where a state was missing a year for all students, we computed growth from the previously tested year. In no instances did this result in more than one skipped year. States missing test scores for some years have fewer growth periods included in the data set.

Table 1: States Included in Study by Year

State	Growth Years		
Arkansas	2012-13	2013-14	2014-15
Arizona	2012-13	2013-14	2014-15
California	2012-13		
Colorado	2012-13	2013-14	2014-15
DC	2012-13	2013-14	2014-15
Florida	2012-13	2013-14	2014-15
Illinois	2012-13	2013-14	2014-15
Louisiana	2012-13	2013-14	2014-15
Massachusetts	2012-13	2013-14	2014-15
Michigan	2012-13		2014-15
Minnesota	2012-13	2013-14	2014-15
Missouri	2012-13	2013-14	2014-15
North Carolina	2012-13	2013-14	2014-15
New Jersey	2012-13	2013-14	2014-15
New Mexico	2012-13	2013-14	2014-15
Nevada	2012-13	2013-14	
New York (state)	2012-13	2013-14	2014-15
New York City	2012-13	2013-14	2014-15
Ohio	2012-13	2013-14	2014-15
Oregon	2012-13	2013-14	2014-15
Pennsylvania	2012-13	2013-14	2014-15
Rhode Island	2012-13		2013-15
Tennessee	2012-13	2013-14	2014-15
Texas	2012-13	2013-14	2014-15
Utah	2012-13	2013-14	2014-15
Wisconsin	2012-13		2013-15

Consolidating Student Data from Multiple States

Because each state uses its own standards and tests to evaluate student academic achievement, it is necessary for CREDO to standardize the values to make them comparable. CREDO does this by creating a bell curve for each test – by subject, grade and year – where the average student score on the test becomes the central value and all other scores are distributed around it. The transformation places each student's performance in relation to all other equivalent tested students, making it ready for comparison with other students. By comparing each student's performance relative to the other students from one year to that same student's relative performance in the next year, CREDO can estimate if the student is growing academically at a rate which is faster, similar or slower than the rate of peers.

Even though average academic performance in state A may represent a difference in achievement from the average academic performance in state B, a change in academic performance (growth) of .05 standard deviations in state A and a .05 standard deviation change in performance in state B both represent the same level of improvement relative to their peers in the students' home state. This is one

of the reasons measurement of academic growth is superior to simple measures of academic achievement, the level of which can vary greatly from state to state.

Since the passage of the No Child Left Behind Act of 2001 (NCLB), states have been required to test students in grades 3-8 and once in high school. The NCLB requirements provide a consistent set of scores for the middle grades but result in less consistency for high school students. To estimate academic growth for high school students in states which do not have grade-level tests in the upper grades, we use data from end-of-course (EOC) exams. For states with a consistent sequence of EOC exams, this estimator works similarly to the grade-level exams. In states with only a single high school exam or a long gap between grade 8 and the EOC exam, we are not able to generate an estimate of academic growth in high school.

Table 2: Tested Grade by State

State	Grade											EOCs
Arkansas		3	4	5	6	7	8					Algebra 1, Geometry
Arizona		3	4	5	6	7	8		10			
California		3	4	5	6	7	8	9	10	11		Algebra 1, Algebra 2, Geometry, General Math, High School Math, Integrated Math 1, Integrated Math 2
Colorado		3	4	5	6	7	8	9	10	11		
DC		3	4	5	6	7	8		10			
Florida		3	4	5	6	7	8	9	10			
Illinois		3	4	5	6	7	8					
Louisiana		3	4	5	6	7	8					Algebra 1, Geometry, English 1, English 2
Massachusetts		3	4	5	6	7	8		10			
Michigan	2	3	4	5	6	7	8					
Minnesota		3	4	5	6	7	8		10			
Missouri		3	4	5	6	7	8					Algebra 1, Algebra 2, Geometry, English 1
North Carolina		3	4	5	6	7	8					Algebra 1, English 1, English 2
New Jersey		3	4	5	6	7	8	9				
New Mexico		3	4	5	6	7	8	9	10	11		
Nevada		3	4	5	6	7	8		10	11	12	

State	Grade										EOCs
New York (state)		3	4	5	6	7	8				Algebra 1, Algebra 2, Geometry, Regents
New York City		3	4	5	6	7	8				Algebra 1, Algebra 2, Geometry, Regents
Ohio		3	4	5	6	7	8		10		
Oregon		3	4	5	6	7	8			11	
Pennsylvania		3	4	5	6	7	8	9		11	Algebra 1
Rhode Island		3	4	5	6	7	8	9			
Tennessee		3	4	5	6	7	8				Algebra 1, Algebra 2, English 1, English 2, English 3
Texas		3	4	5	6	7	8				Algebra 1, English 1, English 2
Utah		3	4	5	6	7	8	9	10	11	Algebra 1, Algebra 2, Geometry, Math 1, Math 2, Pre-algebra
Wisconsin		3	4	5	6	7	8				

Selection of Comparison Observations

A fair analysis of the impact of charter school networks requires a comparison group which matches the demographic and academic profile of charter students to the fullest extent possible. As in previous CREDO studies, this study employed the virtual control record (VCR) method of analysis developed by CREDO. The VCR approach creates a “virtual twin” for each charter student who is represented in the data. In theory, this virtual twin would differ from the charter student only in that the charter student attended a charter school. The VCR matching protocol has been assessed against other possible study designs and judged to be reliable and valuable by peer reviewers (Fortson et al. 2012).

Using the VCR approach, a “virtual twin” was constructed for each charter student. The VCR method draws on the available records of the TPS that the students in a given charter school would have likely attended if they were not in that charter school. These schools are called feeder schools. From the feeder schools for each charter school, we match individual charter students to TPS students with identical traits and identical or very similar² prior test scores.

² Achievement scores were considered similar if they were within 0.1 standard deviations of the charter student’s pre-charter achievement.

Factors included in the matching criteria were:

- Grade level
- Gender
- Race/ethnicity
- Free or reduced-price lunch eligibility
- English language learner status
- Special education status
- Prior test score on state achievement tests



[Click here](#) for an infographic about the Virtual Control Record method.

Figure 1 shows the matching process used by CREDO to create the virtual twins linked to each charter school student. In the first step, CREDO identifies all TPS students with students who transferred to a given charter school. These schools are referred to as “feeder schools” for that particular charter school.³ Students attending a charter school are eliminated from the match pool for each charter student to ensure VCRs consist entirely of TPS students. The feeder school method provides a strong counterfactual as residential school assignment commonly used to place students in TPS has been shown to group demographically and socioeconomically similar students into schools. This practice increases the likelihood that students assigned to similar schools have similar backgrounds and knowledge of school choice programs and school choice options. Once a school is identified as a feeder school for a particular charter, all the students in that TPS become potential matches for students in that particular charter school. All of the student records from all of a charter’s feeder schools were pooled – this became the source of records for creating the virtual twin match.⁴

The VCR matching method then eliminates any of the TPS students from the match pool whose demographic characteristics do not match exactly to the individual charter students. As part of the match process, we also drop from the TPS match pool any students who enrolled in a charter school in subsequent comparison years.

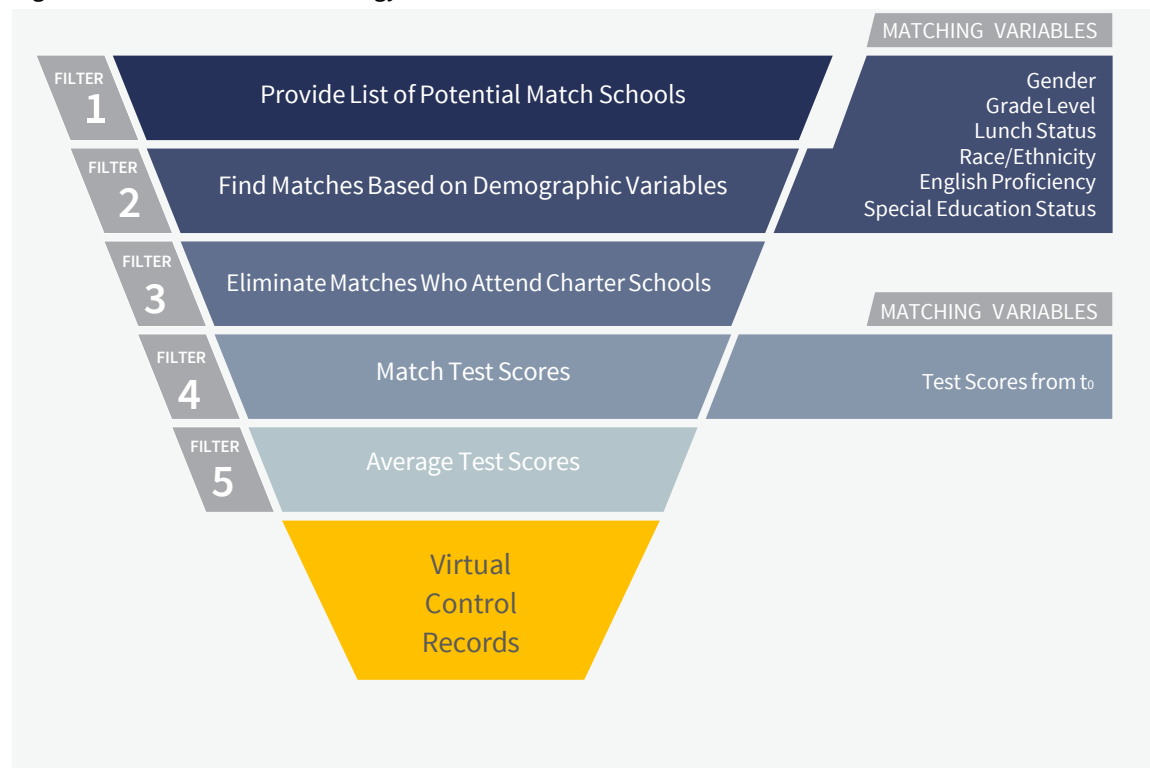
Using the records of TPS students at feeder schools in the year *before* the first year of growth, CREDO randomly selects up to seven TPS students with identical values on the matching variables in Figure 1, including identical or very similar prior test scores. Students with similar test scores were used only when there were not enough TPS students with exact test score matches. The values for the selected TPS

³ For schools with extremely small feeder lists, we include schools with similar characteristics to the charter school which are not actually feeder schools. This method is primarily used to create VCRs for New Orleans charter students due to the lack of traditional public schools in New Orleans.

⁴ Each charter school has its own independent feeder list, and thus a unique pool of potential VCR matches.

students are then averaged to create values for the virtual twin. As all other observable characteristics are identical, the only observable characteristic that differs between the charter student and the VCR is attendance in a charter school. The prior test score represents the impact on academic achievement of both the observable and unobservable student characteristics up to the time of the match, the year before the first growth measurement. Since we matched on observable characteristics and the prior test scores, we concluded that any differences in the post-test scores are primarily attributable to charter school attendance.

Figure 1: CREDO VCR Methodology



Basic Analytic Model

The primary question for this study is, “Do students enrolled in charter schools which are part of a larger network have different growth compared to students enrolled in independent charter schools?” To answer this central question, we need to address multiple lines of inquiry around enrollment in charter schools. To begin, we need to estimate how students who attend different types of charter schools perform compared to how we would have expected them to perform if they had attended traditional public schools. Then we estimate the differences in those differences to determine the value of attending a network charter school compared to an independent charter school.

The primary methodological challenge associated with any study of charter schools is selection bias. Even after controlling for student characteristics such as gender, poverty, race and ethnicity, the fact that

some students choose to enroll in charter schools and other students do not may indicate the existence of some unobserved difference between the two groups of students. The ideal solution to this problem is a randomized experiment that creates a control group that is identical to the treatment group before entering the charter school. Several charter school studies have used admissions lotteries in oversubscribed charter schools to conduct randomized experiments. The approach is not applicable to most charter schools as enrollments are not robust enough to generate a sufficient control group. Additionally, students who lose the lottery are not constrained to attend a TPS. They can and often do attend another charter school. This makes generalizing the results of a randomized control trial to the charter-to-TPS question more difficult.

In the absence of a randomized experiment, several recent studies have demonstrated that it is possible to successfully address selection bias by accounting for students' prior academic achievement levels before entering charter schools (Nichols-Barrer et al. 2016; Furgeson et al. 2012; Fortson et al. 2015). The three previous studies of the achievement effects of charter schools used variations on this approach. Unfortunately, however, it is not clear that the approach can succeed in eliminating all selection bias in the context of charter schools.

For this analysis we used the virtual control records (VCRs) method developed by CREDO (Davis and Raymond 2012), involving virtual controls that closely mirror the matched charter school students on known demographic attributes, eligibility or participation in special support programs (free or reduced-price lunch, English language learners or special education) and prior academic achievement. In order to determine the impact of attending a charter school on student academic growth (the change in academic achievement), we employed statistical models which compare charter students to their virtual twins. The virtual twins represent the expected performance of charter students had they not enrolled in charter schools. The VCR method has been shown to produce results similar to those obtained with randomized control trials and student fixed-effects approaches (Davis and Raymond 2012), such as those used in several published studies of charter-school impacts (for example, Bifulco and Ladd 2006; Booker et al. 2007; Zimmer et al. 2003, 2009).

Presentation of Results

In this report, we present the impacts of attending charter schools in terms of standard deviations. The base measures for these outcomes are referred to in statistics as z-scores. A z-score of 0 indicates the student's achievement is average for his or her grade. Positive values represent higher performance while negative values represent lower performance. Likewise, a positive effect size value means a student or group of students has improved relative to the students in the state taking the same exam. This remains true regardless of the absolute level of achievement for those students. As with the z-scores, a negative effect size means the students have on average lost ground compared to their peers.

It is important to remember that a school can have a positive effect size for its students (students are improving) but still have below-average achievement. Students with consistently positive effect sizes will

eventually close the achievement gap if given enough time; however, such growth might take longer to close a particular gap than students spend in school.

While it is fair to compare two effect sizes relationally (i.e., 0.08 is twice 0.04), this must be done with care as to the size of the lower value. It would be misleading to state one group grew twice as much as another if the values were extremely small such as 0.0001 and 0.0002.

Finally, it is important to consider if an effect size is significant or not. In statistical models, values which are not statistically significant should be considered as no different from zero. Two effect sizes, one equal to .001 and the other equal to .01, would both be treated as no effect if neither were statistically significant.

To assist the reader in interpreting the meaning of effect sizes, we include an estimate of the average number of days of learning required to achieve a particular effect size. This estimate is based on computations by Eric Hanushek and Margaret Raymond. Hanushek and Raymond created the estimate by examining average growth from fourth grade to eighth grade on the National Assessment of Educational Progress (NAEP). The previous translation used in CREDO reports relied on work from Hanushek, Woessmann and Peterson (2012) and estimated the growth rate at 720 days of learning per standard deviation. Incorporating the 2015 NAEP results in reading and math has led to a refinement of the days of learning translation. With the addition of the 2015 NAEP data and taking the average of separate growth estimates for reading and math, the new estimated growth rate is 570 days per standard deviation of growth. We wish to emphasize that the days of learning translation is only meant to be a loose approximation of the effect size to provide a sense of scale to aid the reader in interpreting the effect sizes. The effect sizes are the mathematically computed measures produced by the statistical models and should be the basis for policy decisions.

3. School and Student Demographics

In the 2014-15 school year, there were 101,879 public schools across the country. In Figure 2, the left pie chart indicates the portion of public schools which are TPS, 92 percent, and the portion which are charter, 8 percent. The pie chart on the right shows the percentage of schools from the 2014-15 school year in each charter sector. Of the 8 percent of charter schools in the country, 68 percent are independent charter schools. These schools are typically operated by nonprofit organizations. An additional 22 percent of charter schools are part of a CMO. Only 8 percent of schools are affiliated with a VOS. Finally, 1 percent of charter schools are associated with both a CMO and a VOS. Schools in the CMO, VOS, or HYBRID sectors can be nonprofit or for-profit depending on the network to which they belong.

Figure 2: Percent of All Public Schools in Each Sector, 2014-15 National Data

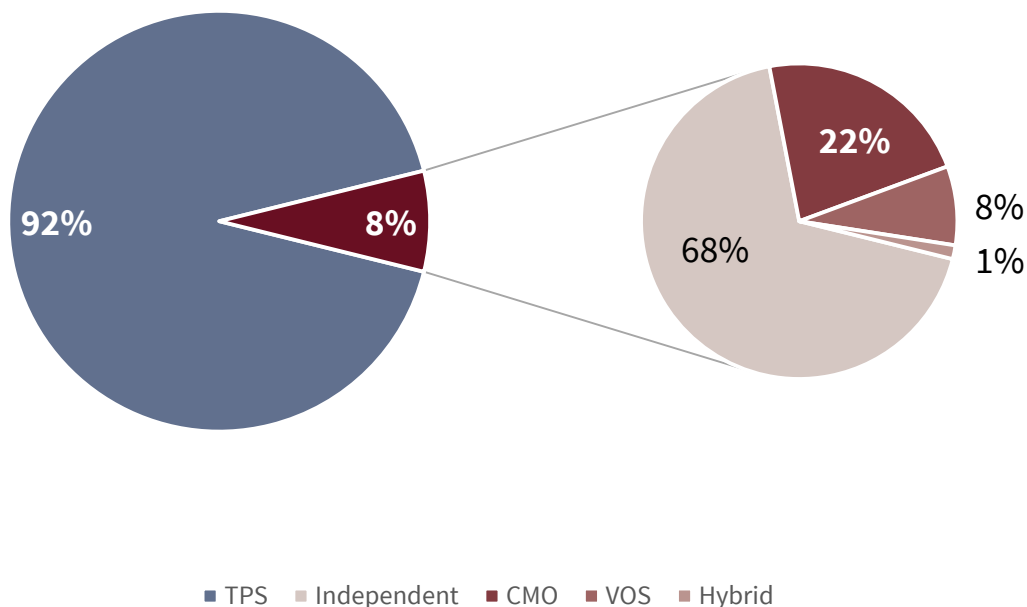
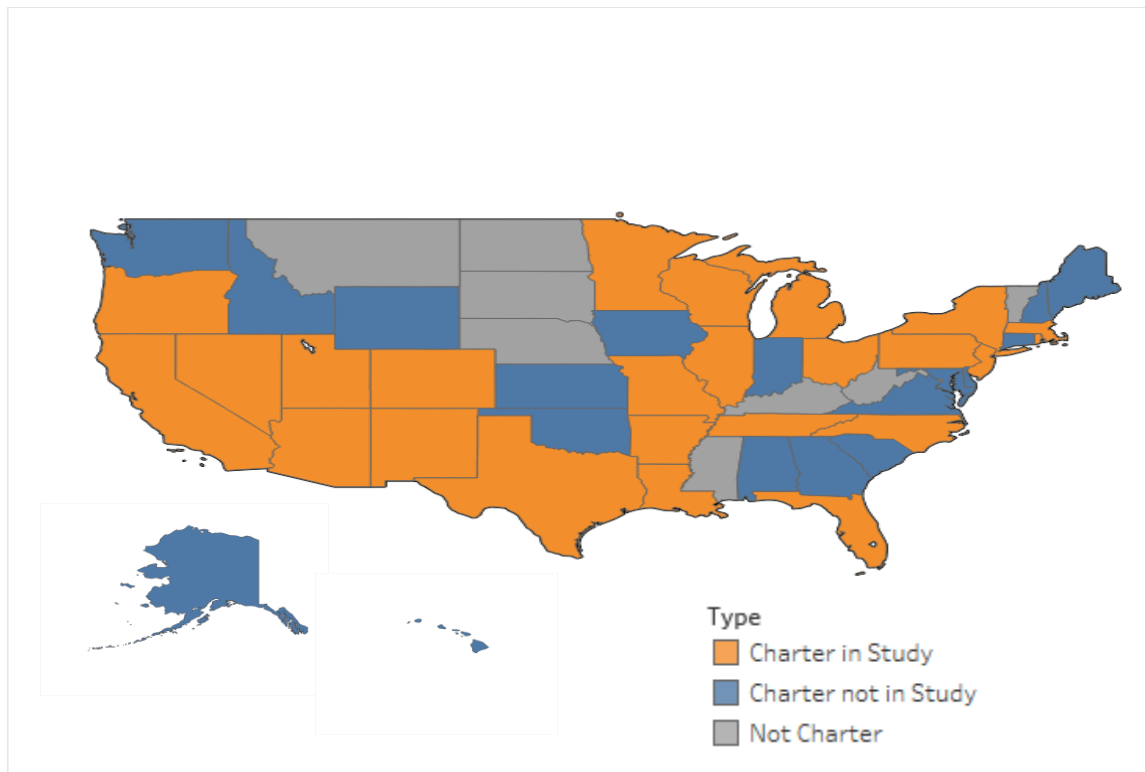


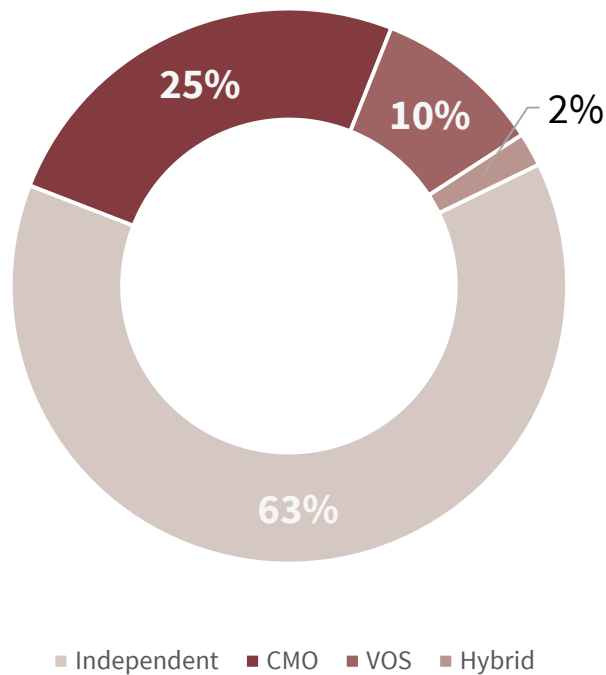
Figure 2 includes data for every public school in America. While CREDO has data agreements with the majority of states with charter schools, this study does not include every state. The map in Figure 3 shows the states included in this study in orange. States in blue had charter schools in the 2014-15 school year but are not included in the study. States in gray had no provisions to permit charter schools in the 2014-15 school year.

Figure 3: States Included in the Data Set by Charter Status



Because the data sample for this report does not include every state in the country, the composition of the sample is slightly different from the national population. Within the data sample for this report, the distribution of charter schools between the sectors remains similar to that of the national distribution. In Figure 4, 63 percent of charter schools in the sample are independent charter schools as compared to 68 percent nationally. The difference is split evenly among the CMO, VOS and Hybrid sectors.

Figure 4: Percentage of Schools by Charter Sector, Analytic Sample



A relationship exists between the charter sectors and school locale. Schools belonging to VOS networks are more likely to be located in a suburban setting. The majority of the Hybrid schools are located in suburban settings. While the majority of independent charters, CMOs and VOSs are located in urban settings, CMO network schools are far more likely to be located in an urban setting compared to the other sectors of charter schools. This likely has an impact on the characteristics of the students who attend schools in each sector. Figure 5 includes the percentage of charter schools in each locale by charter sector.

Figure 5: Percentage of Schools in Each Locale by Charter Sector, Analytic Sample

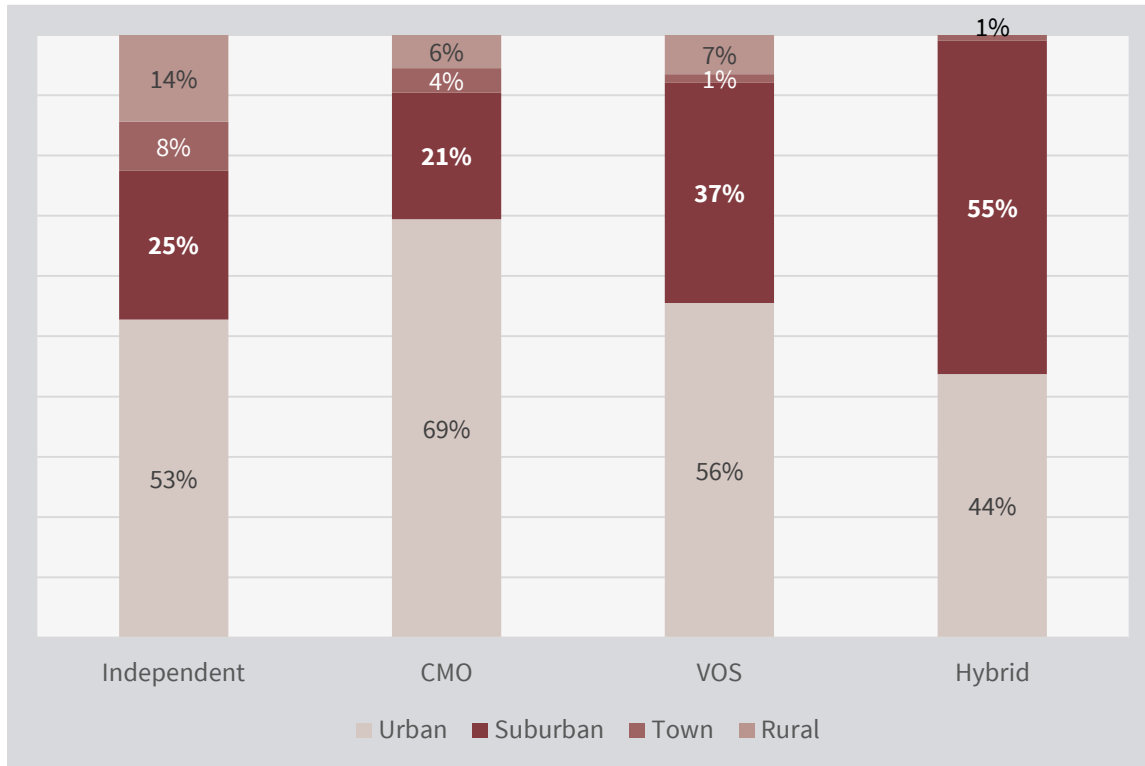


Table 3 shows the one-year characteristics of the student bodies in charter schools, the TPS feeder schools and all traditional public schools for the states included in the impact analysis. The major difference between the charter students and the students attending feeder schools is that the percentage of white students enrolled in the charter schools (34 percent) is lower than the percentage of white students attending both All TPS (48 percent) and feeder schools (39 percent). The difference in the percentage of white students is offset by an increase in the percentage of black students enrolled in charter schools. Across the dataset, 27 percent of students enrolled in charter schools are black, but black students make up only 13 percent of the sample's TPS population and 15 percent of the feeder schools population. Enrollment for other racial/ethnic groups is consistent between TPS and charter schools, except that charter schools serve a smaller percentage of Hispanic students (31 percent) compared to their feeder schools (36 percent).

Students from feeder schools and those enrolled in charter schools are more likely to be in poverty than the general TPS population. Charter schools serve a slightly smaller percentage of English language learners (10 percent) than the feeder schools (13 percent). Also, the percentage of students who require special education services is consistent across all three sectors, with 12 percent of TPS students and 10 percent of charter students receiving special education services.

Table 3: Student Population Demographics by Sector

	All TPS	TPS Feeder Schools	Charter Schools
Number of Schools	63,616	32,119	5,786
Percent Students in Poverty	50%	56%	55%
Percent English Language Learner Students	11%	13%	10%
Percent Special Education Students	12%	12%	10%
Percent White	48%	39%	34%
Percent Black	13%	15%	27%
Percent Hispanic	29%	36%	31%
Percent Asian/Pacific Islander	5%	6%	4%
Percent Native American	1%	1%	1%
Percent Multiracial	2%	2%	2%
Average Total Enrollment per School	555	693	411
Total Enrollment	34,429,712	21,582,524	2,180,342

The information in Table 3 represents the values for the entire potential data set. Of the 2.2 million students in charter schools, we successfully match 84 percent of students to be included in the analytic data set. Table 4 includes the same categories as Table 3 for the matched charter students broken out by charter sector. Not every charter school serves students in tested grades. Thus, the total number of charter schools in Table 4 is only 5,715 schools. One of the noticeable differences between independent charters and network charters is the higher percentage of students in poverty served by charters in the three network sectors. Additionally, charters associated with CMO organizations have much higher percentages of Hispanic students than do independent charters or TPS, but a lower percentage of English language learners. All three types of network charters serve a higher percentage of black students and a lower percentage of white students than independent charter schools.

Table 4: Student Population Demographics for Matched Data Set by Charter Sectors⁵

	Independent Charters	CMO	VOS	Hybrid
Number of Schools	3,608	1,434	561	112
Percent Students in Poverty	53%	68%	58%	71%
Percent English Language Learner Students	6%	9%	4%	4%
Percent Special Education Students	7%	7%	7%	5%
Percent White	41%	23%	37%	10%
Percent Black	24%	31%	33%	33%
Percent Hispanic	29%	42%	25%	55%
Percent Asian/Pacific Islander	4%	3%	3%	1%
Percent Native American	0%	0%	0%	0%
Percent Multiracial	2%	1%	2%	1%
Average Total Enrollment per School	286	358	415	536
Total Enrollment	1,032,417	513,367	233,031	60,042

The majority of charter schools are operated by nonprofit organizations. However, in some states for-profit organizations are allowed to operate charter schools or provide services to charter schools as VOSs. One common question around for-profit charter school operations is whether charter schools operated by for-profit organizations have different growth from that of TPS and nonprofit charter schools. As part of this analysis, CREDO identified those charter networks which operate for-profit and we produce an estimate of the effect sizes of nonprofit charter schools and those which operate with a for-profit partner.⁶

The majority of students, 82 percent, attend a nonprofit charter school. The percentage of students attending a for-profit charter school is consistent across most student subpopulations. The only exceptions are for Asian students, multiracial students and ELL students (see Table 5). Only 13 percent of Asian students and 11 percent of ELL students attend a for-profit school. Twenty-five percent of multiracial students attend for-profit charter schools. This rate is higher than the other race/ethnic groups.

⁵ Hybrid schools are listed as a separate sector and are not included in the CMO or VOS values.

⁶ Independent charter schools are assumed to be nonprofit. While a small percentage of independent charter schools might be for-profit, the estimate provided is for corporate for-profit models.

Table 5: Percent of Students Attending Nonprofit and For-Profit Charter Schools

	Nonprofit	For-Profit
Black	82%	18%
Asian / Pacific Islander	87%	13%
Hispanic	83%	17%
Native American	83%	17%
White	80%	20%
Multiracial	75%	25%
Non-Poverty	81%	19%
In Poverty	82%	18%
Non-ELL	81%	19%
In ELL	89%	11%
Non-SPED	82%	18%
In SPED	80%	20%

4. Impact Analysis

For the impact analyses, we compare the growth of students in different charter school sectors to that of their VCRs. This type of analysis provides information about the year-to-year change in achievement relative to that of the rest of the students in the sample. On average, the effect sizes for students attending charter schools are positive but small. A positive effect size means students attending charter schools grew more than they would have been expected to grow in a TPS setting.

Growth by Charter Sector

The first set of analyses examines the academic growth of charter students from various sectors as compared to their matched VCRs. Note that assignment to charter sectors is based on the management structure of the charter network, not profit status. Figures 6 and 7 are agnostic to for-profit/non-profit status. Figure 22 includes a breakout of results by network profit status. Charter students attending an independent, non-network-affiliated charter school have similar growth to their VCRs as do students attending a charter school affiliated with a VOS. Students attending a charter school affiliated with a CMO tend to have stronger math growth equivalent to approximately 17 days of additional class time. The strongest effect in math is for students attending schools which are affiliated with both a CMO and a VOS. The effect for these students is equivalent to 51 days of additional class time.

Figure 6: Impact by Charter Sector Attendance on Average Student Academic Growth, Math

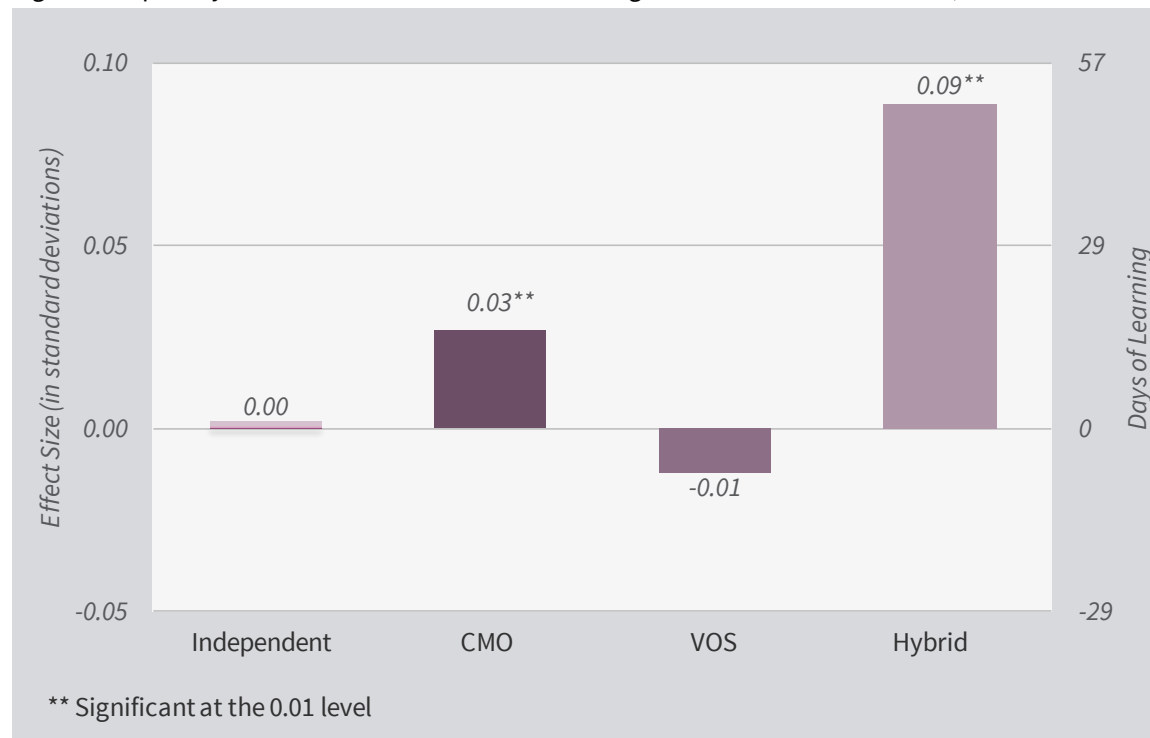
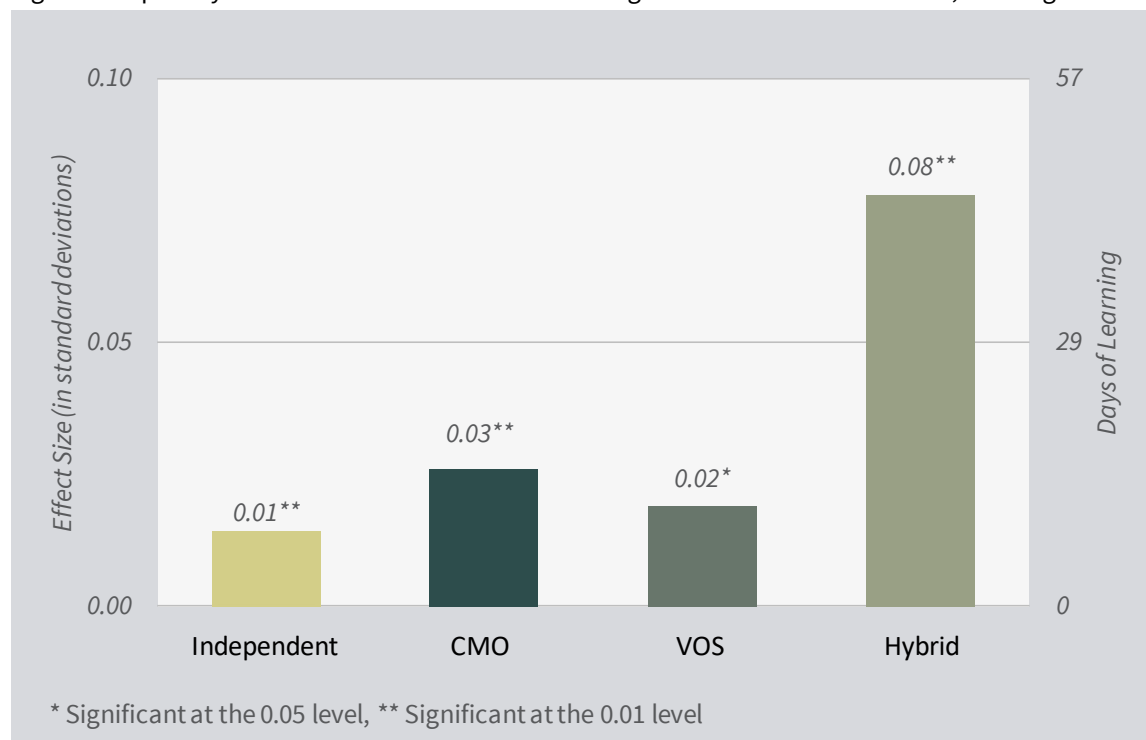


Figure 7 shows the results of the primary analysis for reading. Across all four sectors of charter schools the impact of attending a charter school is significant and positive in reading. As with math, the effects

are smallest for non-network and VOS schools and largest for schools affiliated with both a CMO and a VOS. Students attending a non-network-affiliated charter school are expected on average to experience the equivalent of an additional six days of growth per school year; VOS students 11 days; CMO students 17 days; and students attending Hybrid schools are gaining the equivalent of approximately 46 days of additional learning.

Figure 7: Impact by Charter Sector Attendance on Average Student Academic Growth, Reading

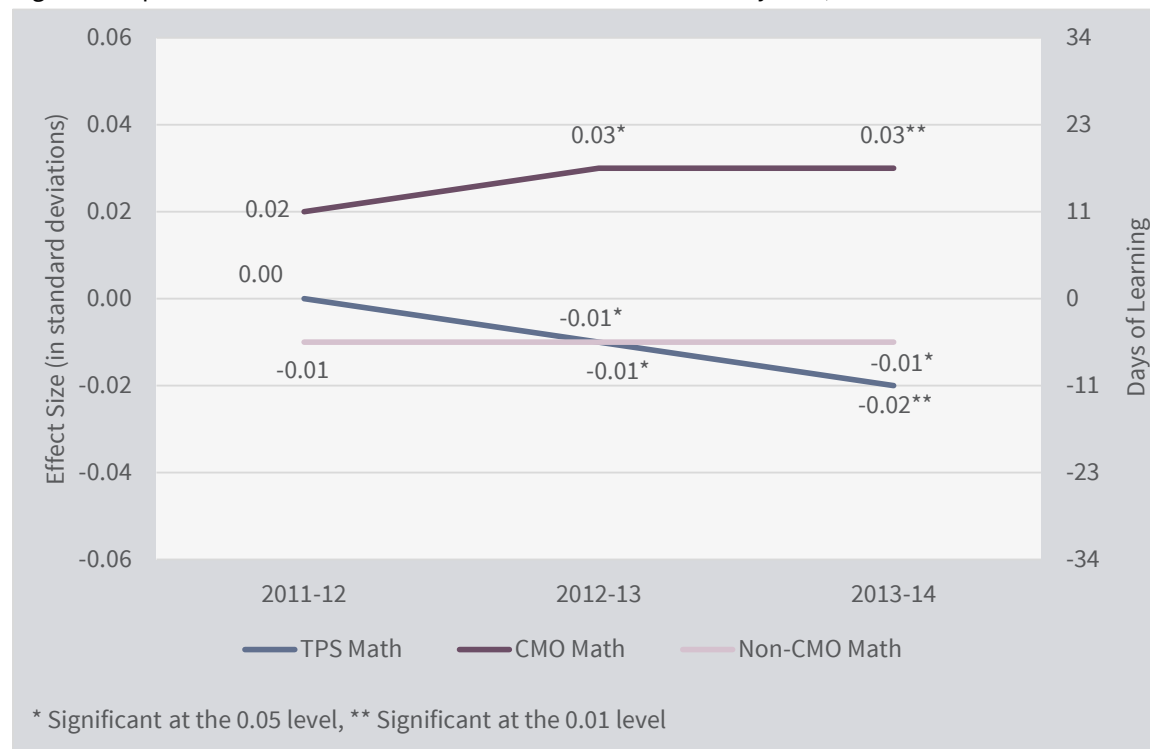


These results cover all students with a growth measure (i.e., at least two years of tested performance) in all the states in all the periods. They show that, overall, students attending charter schools have stronger growth than those attending TPS. The all-in figures, however, mask the story of the underlying data. In most common usages, the term "growth" indicates an increase; however, in statistical terms, growth can be positive, an increase in value, or negative, a decrease in value. To explore whether the positive charter effects are due to increases in growth for charter school students or decreases for TPS students, we need to examine the changes in growth over time. Figures 8 through 12 look at the by-year growth for the sectors. For this analysis, each graph includes three lines. One line represents all TPS students. The second line represents charter students from a given sector. The third line represents the growth of all

the remaining charter students. In all the by-year graphs, the values shown are relative to 2011-12 TPS growth which is set to 0.00.⁷

Figure 8 shows the by-year growth for CMO students in math. Charter students in non-CMO settings have steady growth across the years, whereas CMO charter students see a slight uptick in growth. The TPS students have declining math growth in 2012-13 and 2013-14 relative to TPS growth in 2011-12.

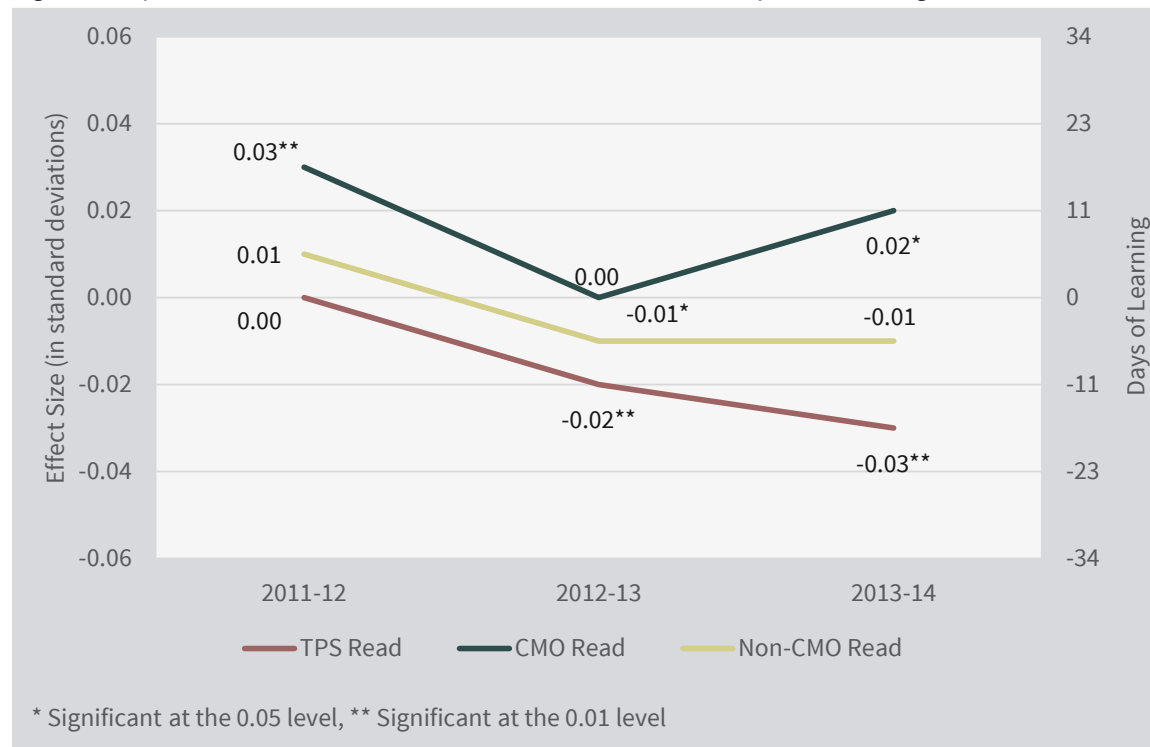
Figure 8: Impact of CMO Charter Attendance on Academic Growth by Year, Math



For reading, Figure 9 shows a small but steady decline in growth across all three groups. Even with their slight decline in growth, CMO students maintain stronger growth relative to non-CMO charter and TPS students in all three growth periods. These findings suggest that the positive charter effect for CMO charter students in reading is due in part to declining growth of TPS students.

⁷ This means the asterisks for statistical significance indicate whether a value is significantly different from TPS growth in 2011-12. The asterisks do not indicate significance between charter and TPS pairs in a given year.

Figure 9: Impact of CMO Charter Attendance on Academic Growth by Year, Reading



Students attending VOS charter schools see a decline in math growth over the years (Figure 10). The decline in math growth for VOS students almost exactly mirrors the decline for TPS students. This aligns with the overall not-significant finding in math for VOS students (see Figure 6).

Reading growth patterns for VOS schools (see Figure 11) are similar over time to growth patterns for CMO schools. While the TPS baseline drops from year to year, VOS growth takes a dip in the 2012-13 growth year but then recovers part of the drop in 2013-14. The similarity in growth patterns for the VOS and CMO sectors aligns with the similarity in overall reading results in the two sectors.

Figure 10: Impact of VOS Charter Attendance on Academic Growth by Year, Math

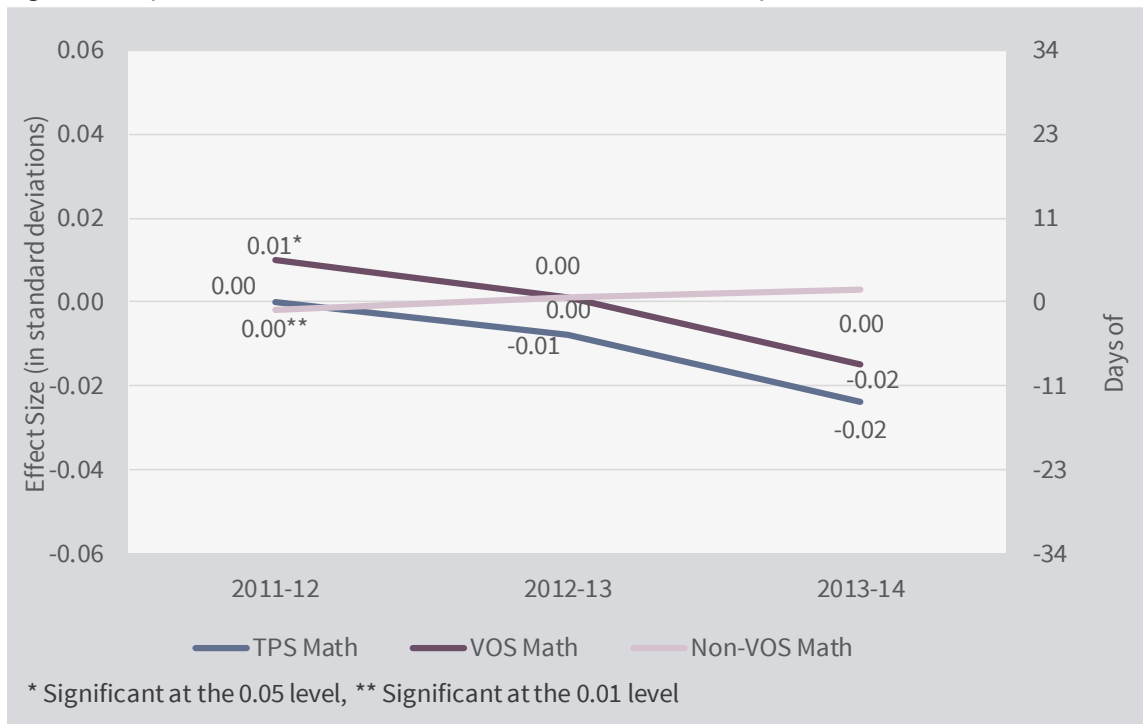
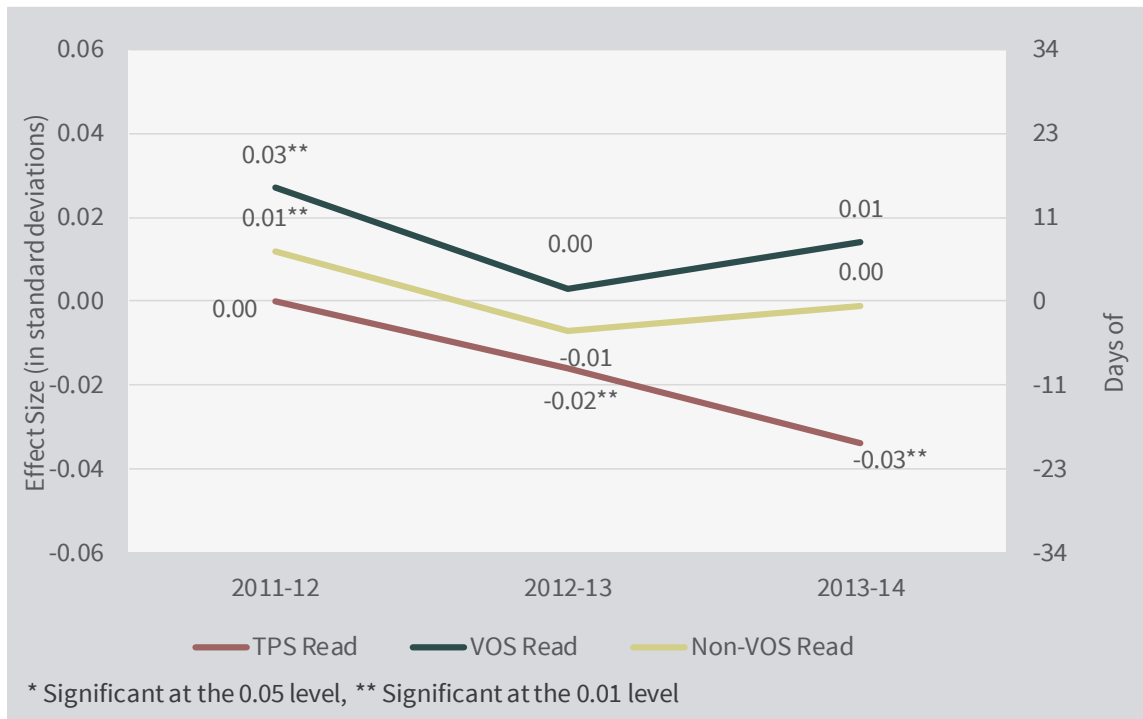


Figure 11: Impact of VOS Charter Attendance on Academic Growth by Year, Reading



The math growth results for schools which are part of both a CMO and a VOS show a large drop in their growth rate during the 2013-14 growth year (Figure 12). However, their growth remains much stronger across all years than the non-Hybrid schools and TPS. Likewise, Figure 13 shows the reading growth for Hybrid schools slowing over the years, but remaining strong relative to the TPS sector reading growth.

Figure 12: Impact of Hybrid Charter Attendance on Academic Growth by Year, Math

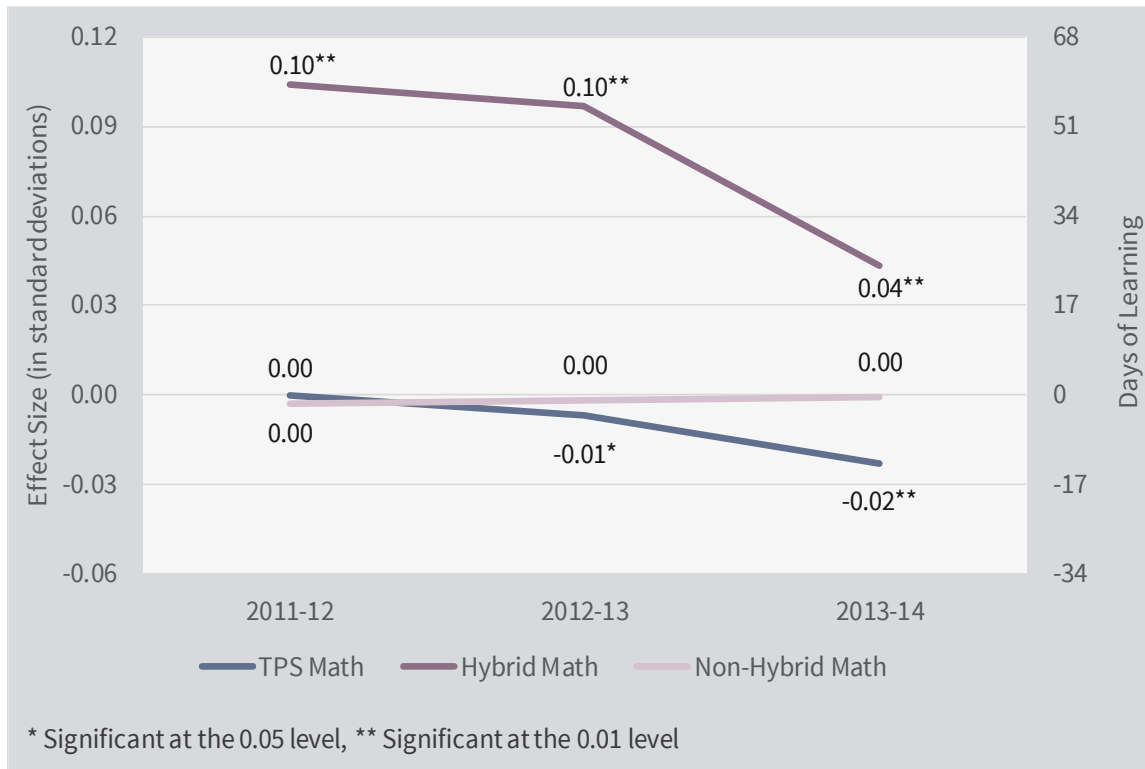
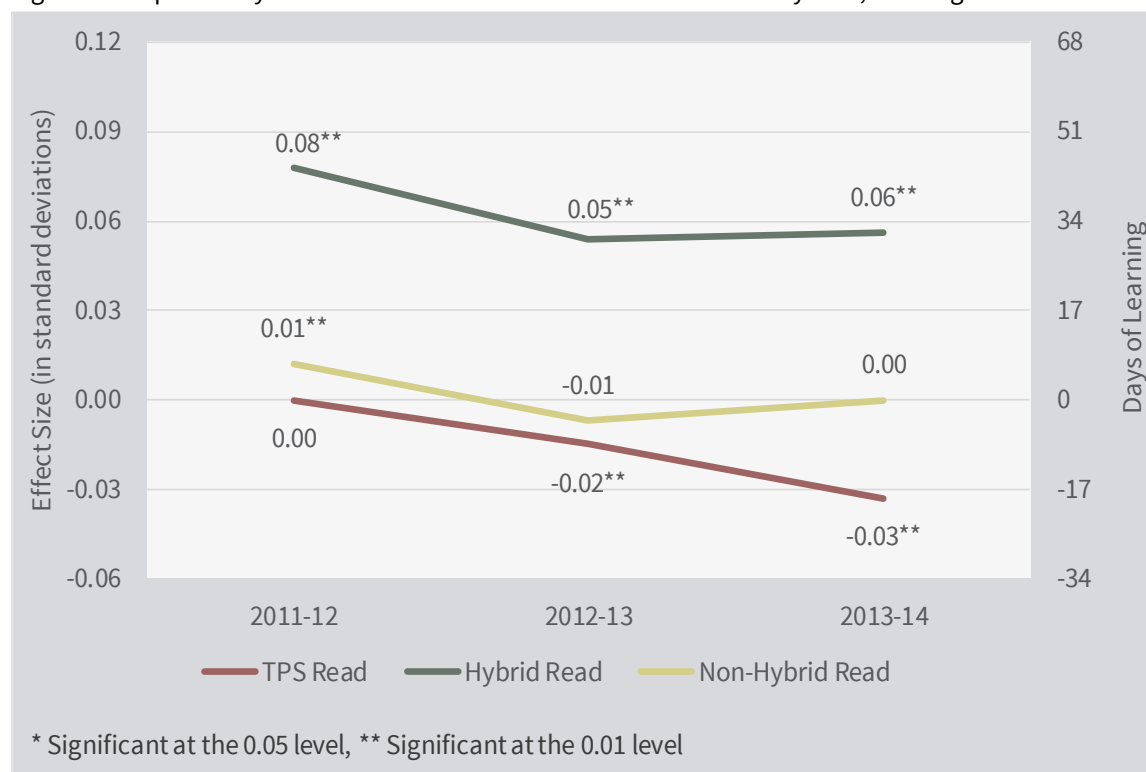


Figure 13: Impact of Hybrid Charter Attendance on Academic Growth by Year, Reading

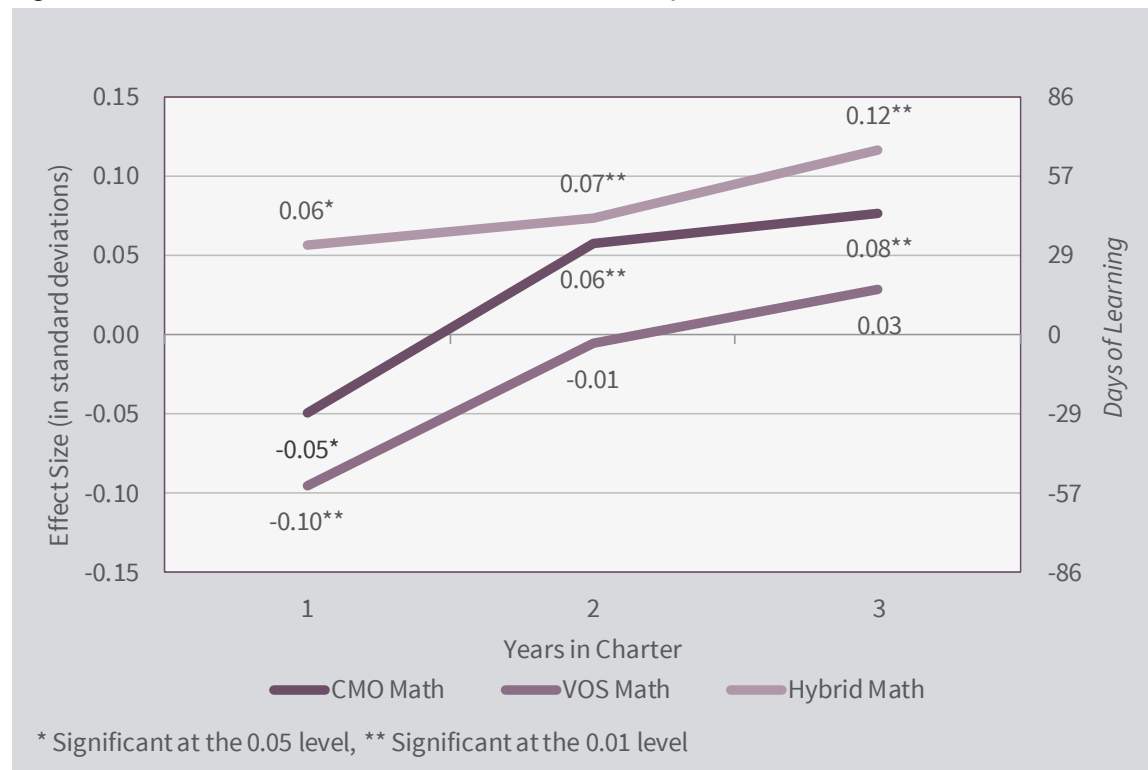


Overall, the growth of TPS students declines in the later years of the study, especially in reading. But with the exception of CMO math, the growth of students in each of the charter sectors also slows. This suggests the overall charter school effects we see are the result of charter students consistently obtaining stronger growth relative to the TPS sector across the entire timeline of the study even though charter growth has slowed somewhat since 2011-12. The results are consistent over time and are not caused by an anomalous single year of growth.

Results by Years in Charter

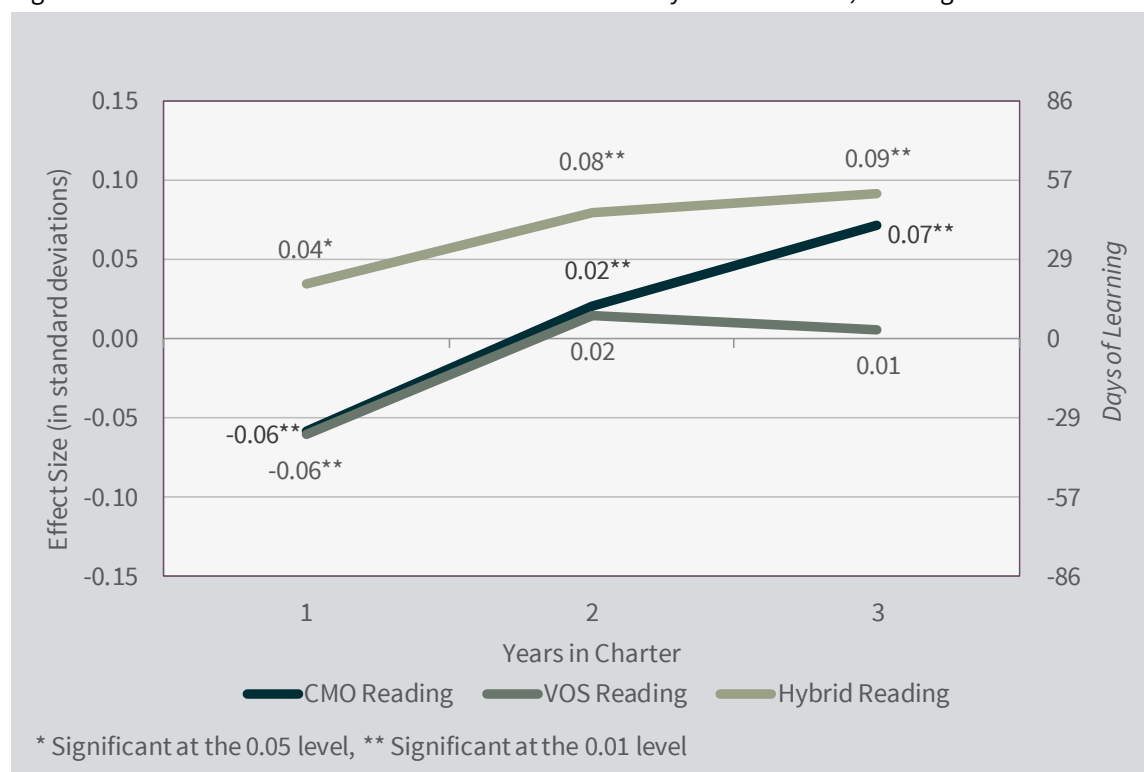
The effects on charter student growth are not constant with every year of enrollment. Typically, students in their first year at a charter school have weaker growth than their TPS peers. The trend reverses in the second year, often becoming significantly positive. In all three charter sectors, annual growth improves the longer students remain in charter schools. Figure 14 shows results from the statistical models for each sector in math. The pattern of improving growth can clearly be seen.

Figure 14: Annual Growth Rates Based on Years in Charter by Charter Sector, Math



The same pattern of increasing growth can also be seen in all three sectors in reading. As Figures 15 and 16 show, in both math and reading, students attending charter schools affiliated with both a CMO and a VOS had the strongest growth. However, CMO-affiliated students had the strongest increase in growth with additional years in charter schools in both math and reading.

Figure 15: Annual Growth Rates Based on Years in Charter by Charter Sector, Reading



Figures 14 and 15 include data from three different statistical models (CMO, VOS and Hybrid). Results for each individual sector's charters compared to non-sector charters are available in the data appendix.

Results by School Level

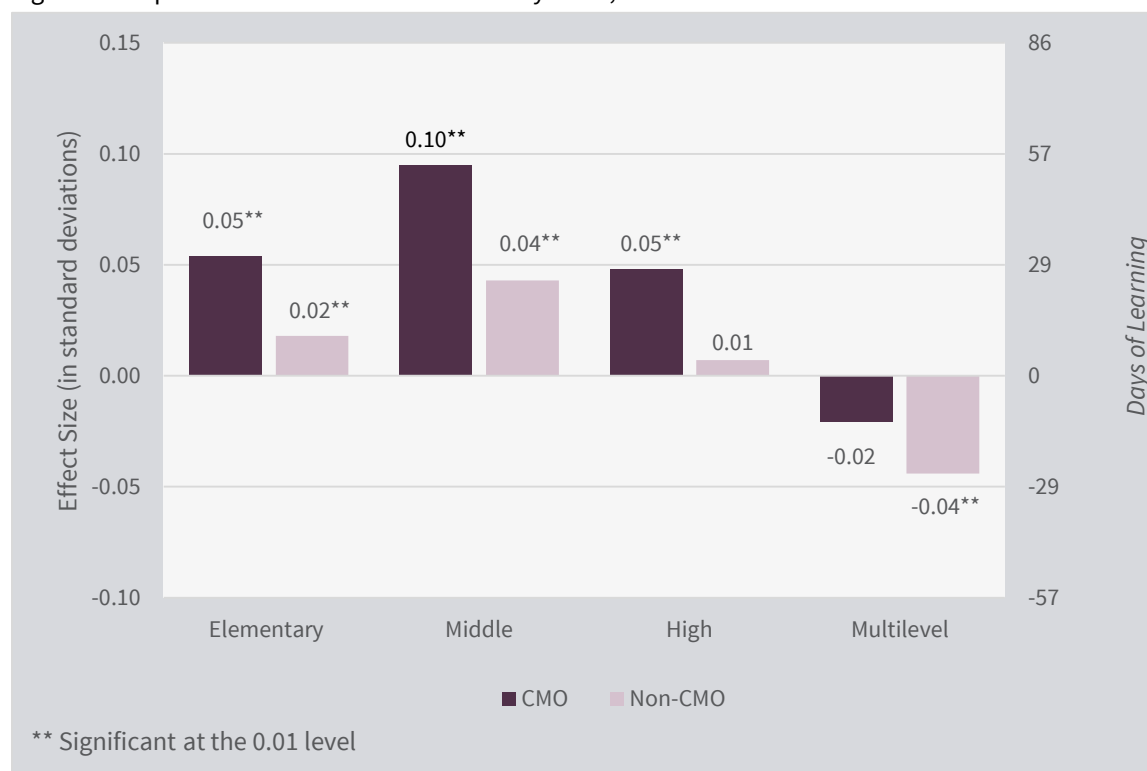
The National Center for Education Statistics (NCES) classifies schools into levels based on the grades served by the schools. Prior CREDO studies show that attending a charter school has different effects by school level. Generally, high schools⁸ and multilevel schools have weaker charter effects than elementary and middle schools. Typically, the strongest charter effects are found in schools classified as middle schools.

All levels of CMO charter schools have significantly stronger math growth compared to TPS peers with the exception of CMO multilevel charter schools. As expected, Figure 16 shows CMO middle schools have the strongest results in math at 0.10 or 57 additional days of learning. CMO multilevel charter schools perform similarly to TPS multilevel schools, and non-CMO multilevel charters have weaker growth than their TPS peers. In addition to having stronger impacts than TPS schools, CMO elementary, middle and

⁸ NCES classifies a school as a high school only if the school serves 12th grade students. CREDO classifies schools as high schools if the lowest grade in the school is ninth grade or above.

high schools have significantly stronger growth than the non-CMO schools of the same level. Effect size differences between CMO and non-CMO multilevel schools were not significantly different from each other.

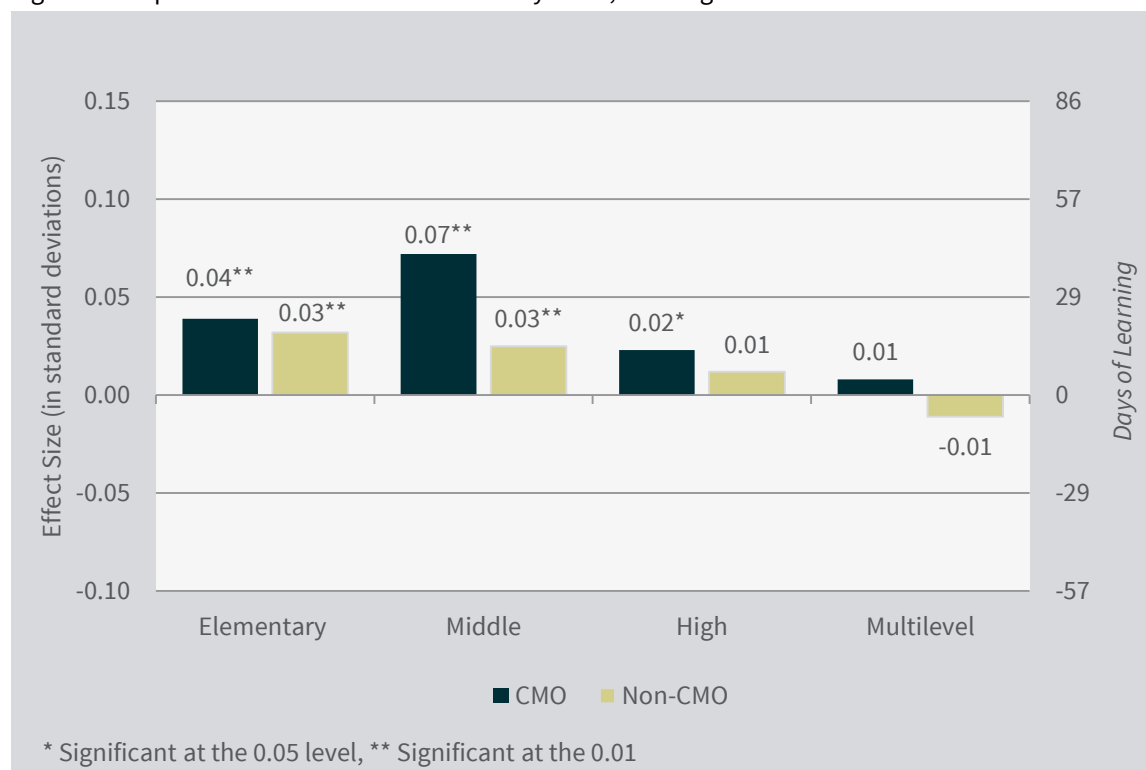
Figure 16: Impact of CMO Charter Attendance by Level, Math



The 0.00 line represents the average TPS growth for each level.

The reading results for CMO schools (see Figure 17) follow the same general pattern as CMO math except that the effect sizes in reading are smaller in magnitude than the math results. The largest reading effect size, 0.07, is equivalent to 40 days additional growth. As with math, middle school students attending a CMO charter school had the strongest growth of the three sectors (CMO, non-CMO charters and TPS). Only CMO middle schools have significantly different growth than their non-CMO charter peers. Middle school students attending a CMO middle school have reading growth which is 23 days stronger than non-CMO charter middle school students and 40 days stronger than TPS middle school students.

Figure 17: Impact of CMO Charter Attendance by Level, Reading

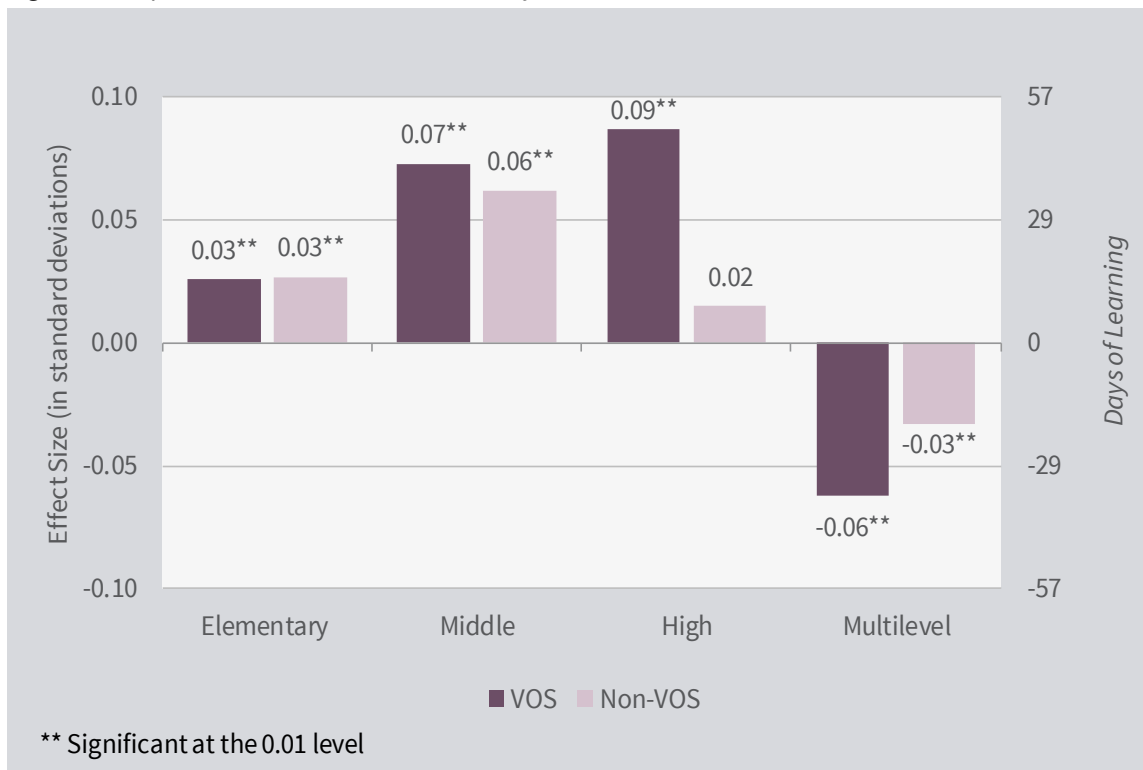


The 0.00 line represents the average TPS growth for each level.

The math effect for VOS charter schools has a different pattern than the patterns we have seen for CMOs (Figure 18). For VOS charter schools, high schools have the strongest effect size, 0.09. Further, multilevel VOS charter schools have particularly weak growth as the effect size is a significant -0.06. Multilevel non-VOS charters also have weaker growth than their TPS counterparts. Only VOS high school students had growth which was significantly different from non-VOS students at the same level. This means typically VOS charter students perform similarly to non-VOS charter students. The difference in effect sizes for students attending a VOS charter high school and those attending a non-VOS charter high school is 0.07⁹ or the equivalent of 40 additional days of learning.

⁹ 0.09 – 0.02 = 0.07

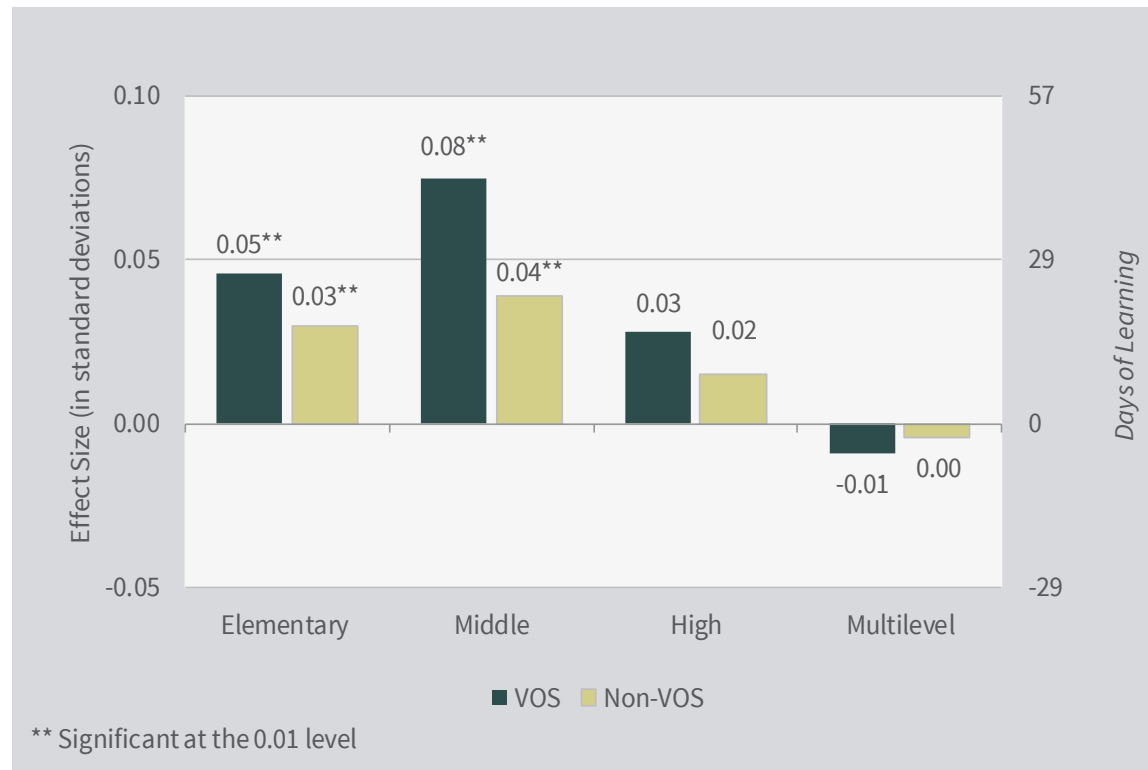
Figure 18: Impact of VOS Charter Attendance by Level, Math



The 0.00 line represents the average TPS growth for each level.

Reading results for VOS charter schools (Figure 19) are similar to CMO charter schools in both pattern and magnitude. Elementary and middle school students attending VOS-affiliated charter schools have significantly different reading growth compared to non-VOS charter schools. The high school and multilevel effects for VOS schools are not significantly different from the effects for non-VOS charter students.

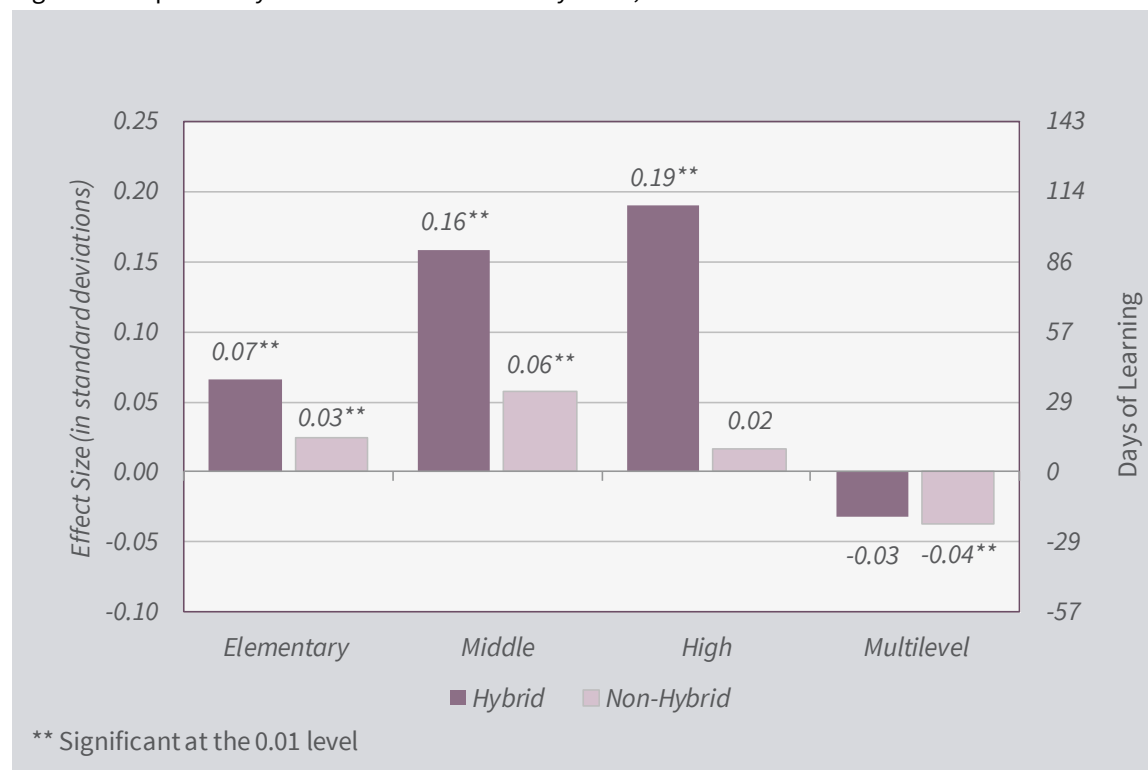
Figure 19: Impact of VOS Charter Attendance by Level, Reading



The 0.00 line represents the average TPS growth for each level.

Charter schools affiliated with both a CMO and a VOS have particularly strong effect sizes for high school students (0.19) and middle school students (0.16) when compared to TPS students. These effects are the equivalent of 108 days and 91 days additional learning, respectively. The middle school and high school differences in effect sizes between Hybrid and non-Hybrid charter schools are also large. The difference between the two charter sectors for high schools is 0.17, roughly 97 days of learning; for middle schools 0.10 (57 days of additional learning); and 0.04 (23 additional days learning) for elementary students. The differences in effect sizes between Hybrid and non-Hybrid multilevel students are not significantly different in math.

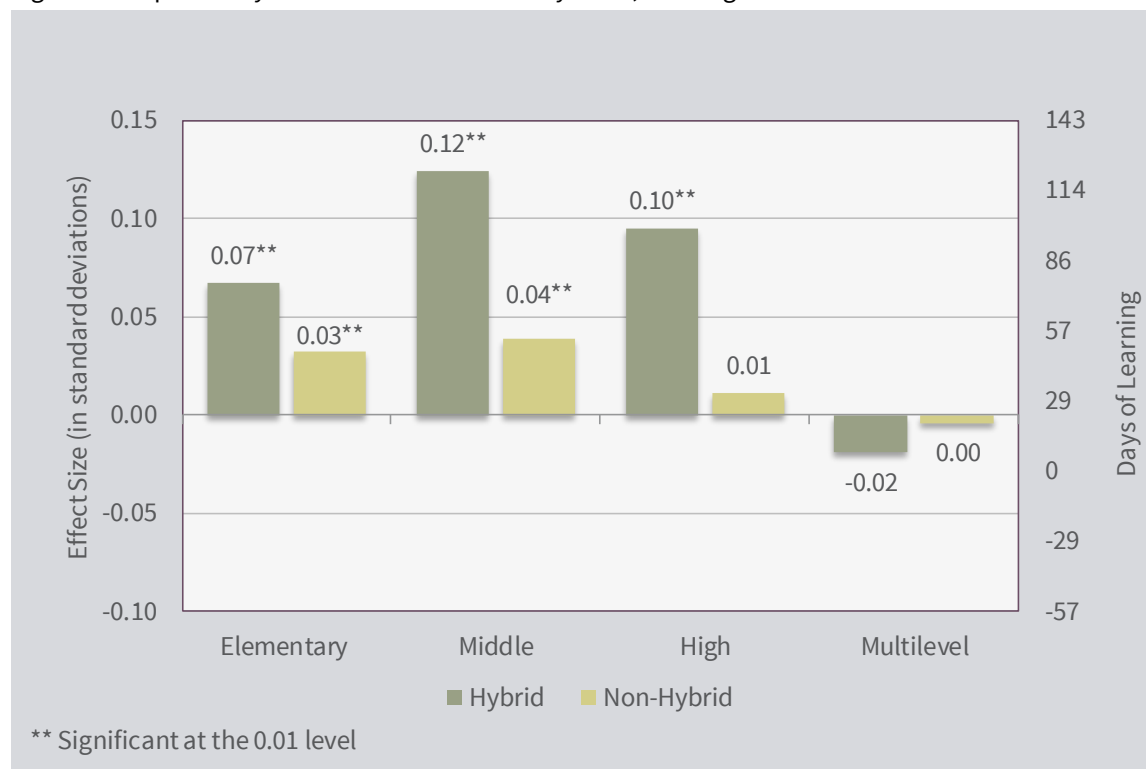
Figure 20: Impact of Hybrid Charter Attendance by Level, Math



The 0.00 line represents the average TPS growth for each level.

The effect sizes in reading for Hybrid charter schools are largest for middle schools (0.12) and high schools (0.10). As with Hybrid results for math, the differences between effect sizes for the two charter sectors, Hybrid and non-Hybrid, are significantly different for elementary, middle and high schools.

Figure 21: Impact of Hybrid Charter Attendance by Level, Reading



The 0.00 line represents the average TPS growth for each level.

Results by Profit Status

As discussed in the demographics section, 18 percent of charter school students attend schools operated by for-profit companies. The question of the performance of for-profit schools frequently arises in discussions of charter school policy. Often, the question is founded on a presumption that for-profit operators prioritize profit over student results or that the profit motive leads to short-run savings that mask longer run harms. On the other hand, profit-oriented operators may be more inclined to seek out ways to increase efficiency and may be able to simultaneously provide services at a lower unit cost as well as create a margin of profit. To investigate, we include a model which compares the performance of schools operated by for-profit companies to their VCRs. We can also compare the effect sizes of for-profit charter schools to those of nonprofit charters. Table 6 includes the number of students served by networks based on charter sector and profit status. We combine all types of for-profit providers for this analysis.

Table 6: Number of Students in Each Sector by Profit Status

	Independent	CMO	VOS	Hybrid
Non-Profit	1,032,417	420,423	32,942	569
For-Profit		94,089	212,051	43,319

In Figure 22 the nonprofit effect sizes are shown in the darker shaded bars while the for-profit effects are in the lighter bars. Nonprofit charter schools have a significant 0.02 effect size in both reading and math when compared to the TPS 0.00 baseline. This means students attending nonprofit charter schools have stronger growth than their VCRs in TPS. For-profit charter schools have a significant negative effect size in math and a non-significant effect in reading. Therefore, we conclude students attending a for-profit charter school have weaker growth in math than they would have in a TPS setting and similar growth in reading. Further, we are able to contrast the effect sizes of for-profit charter schools to those of nonprofit charter schools in both subjects. These comparisons show a significant difference between the two groups in both subjects. This means students in nonprofit charter schools have 0.04 or 23 days stronger math growth than those in for-profit charter schools. Even though the difference between nonprofit and for-profit reading effect sizes is only 0.01 or six days, this small difference is still significant at the .05 level.

Figure 22: Impact of Attending a Nonprofit or For-Profit Charter School, Math and Reading



Results by State

To delve deeper, we also include analyses of charter sectors by state. In the full-data general case analysis, we use statistical methods to control for differences between states. In the charter sector by state analyses, we examine the impact of attendance by charter sectors in each state as compared to the state's average student academic growth. Tables 7 through 9 have six columns of effect sizes. The first and fourth columns represent the average growth in the state for students in the specific charter sector (CMO, VOS, Hybrid) as compared to the VCRs with the first column being math and the fourth reading. The second and fifth columns represent average growth for nonspecific-sector charter students in math and reading, respectively, compared to the VCRs. The third and sixth columns show the difference between the specific sector effect size and nonspecific sector effect sizes. Therefore, Tables 7 through 9 tell us if each charter sector has stronger growth than the VCRs in the state (has a positive number with asterisks) and if one charter sector performs stronger than the other charters in the state (has a positive number with asterisks in the difference column).

In Tables 7 through 9, an effect size of 0.00 indicates students in that charter sector have growth equal to the average VCR student in the state. A positive effect size means the average student in the charter sector has stronger growth than the average VCR student. A negative effect size means growth for charter sector students is weaker than the average VCR comparison student. For columns three and six, a positive effect size indicates the specific sector has stronger growth than the non-sector charter schools. Asterisks represent whether the numbers are significantly different. If the number is not marked with asterisks, consider the value to be effectively zero.

Results for the CMO sector are shown in Table 7. Six states have CMO charter sectors which have stronger math growth than their VCRs and three states have CMO charter sectors with weaker math growth than their VCRs. For the non-CMO charter schools, eight states have significant and positive effects indicating stronger growth and five states have significantly weaker growth in the non-CMO sector. The CMO sectors in several states have large effect sizes. Massachusetts has the largest effect size, 0.31, which would be equivalent to 177 additional days of learning per year. At the same time, CMO charter schools in Nevada have a large negative effect size of -0.23, which would be equivalent to 131 fewer days of learning. These findings of wide variation in charter school performance across states are also found in CREDO's 2013 CGAR study (Woodworth and Raymond 2013). In general, the effect sizes in the non-CMO charter sector are smaller in absolute values than those in the CMO sector.

One of the major questions of this analysis is whether CMO-affiliated charter schools have stronger effects than non-CMO-affiliated schools. To make this comparison requires us to examine the difference between effect sizes. To isolate the difference, we subtract the non-CMO effect size from the CMO effect size for each state and compare them. In six states, the CMO schools have stronger growth than the non-CMO charter schools. However, these are not necessarily the same six states mentioned above with CMO growth stronger than the VCRs. For example, Washington, D.C., has stronger growth in both CMO and

non-CMO charter sectors compared to the VCRs, but neither sector is significantly outperforming the other. While some states have one sector significantly different from TPS and the other sector not significantly different, no states have one sector significantly positive and the other significantly negative. This suggests the two sectors have the same general trend in performance relative to their VCRs. Clearly, though, in some states one sector highly outperforms the other even if both have stronger or weaker growth than the VCRs. Massachusetts stands out as both charter sectors have stronger math growth than the VCRs; the CMO sector has much stronger growth, 125 days stronger, compared to the non-CMO charters. On the other extreme, Nevada again is the standout with its CMO sector having an effect size difference of -0.16, equal to 91 days less growth, compared to non-CMO charters in math, and -0.15, equal to 86 days less growth, in reading.

The patterns for reading are stronger for CMO charters. For reading, 13 states have CMO charter sectors with stronger growth than the VCRs and four states have weaker growth in the CMO sector. For non-CMO charters, 12 states have stronger growth and only three states weaker. When comparing the differences between the two charter sectors, we find six states in which the CMO sector has significantly stronger growth and three where the CMO sector's growth is weaker than the non-CMO charters. Again, if both charter sectors are significantly different from the VCRs, then they are both different in the same direction. That is to say, when both sectors are significant, either both charter sectors are significantly stronger than the VCRs or both sectors are significantly weaker.

Table 7: Performance of CMO and Non-CMO schools by State, Math and Reading

	CMO Math	Non-CMO Math	Difference Math ¹⁰	CMO Reading	Non-CMO Reading	Difference Reading	
AR	0.05	-0.06*	0.10*	0.05*	-0.02	0.07*	Math
AZ	-0.01	-0.02	0.00	0.02	0.03**	-0.01	More than 0.08
CA	0.00	0.00	0.01	0.02*	0.02*	0.00	0.02 to 0.08
CO	0.10	0.00	0.10	0.08*	0.01	0.07*	-0.02 to 0.02
DC	0.15**	0.13**	0.03	0.09**	0.07**	0.02	-0.02 to -0.08
FL	0.07**	-0.02	0.09**	0.05**	0.00	0.05**	Less than -0.08
IL	0.03	0.01	0.02	0.02	0.01	0.01	
LA	0.06	0.05	0.01	0.03	0.04	-0.01	Reading
MA	0.31**	0.09**	0.22*	0.23**	0.07**	0.17*	More than 0.08
MI	-0.02	0.05**	-0.07*	0.04*	0.07**	-0.03	0.02 to 0.08
MN	0.00	-0.02	0.02	0.00	0.02	-0.02	-0.02 to 0.02
MO	0.08	0.09**	0.00	0.04	0.08**	-0.05	-0.02 to -0.08
NC	0.06	0.00	0.06	0.05*	0.03**	0.02	Less than -0.08
NJ	0.23	0.09**	0.14	0.20**	0.10**	0.11	
NM	-0.11	-0.02	-0.09	-0.17**	0.00	-0.17**	
NV	-0.23**	-0.07*	-0.16**	-0.19**	-0.05*	-0.15**	
NY	0.25**	0.10**	0.15*	0.15**	0.10**	0.05	
NYC	0.14**	0.06**	0.09**	0.05**	-0.01	0.07**	
OH	-0.02	-0.07*	0.04	-0.01	-0.03	0.01	
OR	-0.16*	-0.05*	-0.11	-0.11*	-0.06**	-0.05	
PA	-0.04	-0.05	0.01	-0.01	-0.02	0.01	
RI	0.22**	0.07**	0.15**	0.21**	0.11**	0.11**	
TN	0.01	0.07*	-0.05	0.05	0.08**	-0.02	
TX	0.02	-0.02	0.04	0.03**	0.01	0.02	
UT	‡	-0.05**		‡	-0.03*		
WI	0.01	0.02	-0.01	0.07	0.03*	0.04	

* Significant at the 0.05 level. **Significant at the 0.01 level.

‡ Data suppressed as number was result of single school.

Several states do not have VOS charter schools or have only one-VOS affiliated charter school. Even though fewer states have VOS charters as compared to CMOs, the findings for VOS and non-VOS charters are more complicated than those for CMO and non-CMO charters. One interesting aspect of the VOS analysis is the existence of differing directions in the effects. For example, in Louisiana, VOS-related charters have a significant negative effect on growth in math while non-VOS charters have a significant positive effect. These types of differences can be informative because they point to locations where differing practices or differing populations may lie at the root of the opposite outcomes for the two sectors. One statistical anomaly in the VOS results is Colorado's math results. While neither VOS nor non-

¹⁰ The differences column is computed by subtracting the non-CMO effect from the CMO effect in each state. Significance of the difference was determined by a Wald test on the regression coefficients.

VOS effects in Colorado are significantly different from their VCRs, the two effects (-0.02 and 0.02) are significantly different from each other. This is the result of smaller sample sizes requiring larger effects to reach significance.

Table 8: Performance of VOS and Non-VOS schools by State, Math and Reading¹¹

	VOS Math	Non-VOS Math	Difference Math	VOS Reading	Non-VOS Reading	Difference Reading	
AR	‡	-0.02			0.00		Math
AZ	-0.01	-0.02	0.00	0.04*	0.02*	0.01	More than 0.08
CA	-0.07	0.00	-0.07	0.06*	0.02**	0.04	0.02 to 0.08
CO	-0.02	0.02	-0.04*	0.01	0.02*	-0.02	-0.02 to 0.02
DC	0.15**	0.14**	0.02	0.06*	0.08**	-0.03	-0.02 to -0.08
FL	0.02	0.00	0.02	0.04**	-0.01	0.04**	Less than -0.08
IL	0.02	0.02	0.00	0.01	0.02	-0.01	
LA	-0.14**	0.08**	-0.22**	-0.03	0.05*	-0.08*	Reading
MA	0.03	0.12**	-0.09	-0.05	0.10**	-0.15**	More than 0.08
MI	0.08**	-0.01	0.08**	0.09**	0.03**	0.06**	0.02 to 0.08
MO	0.03	0.08*	-0.05	0.07	0.07**	0.00	-0.02 to 0.02
NC	0.04	0.01	0.03	0.01	0.03**	-0.02	-0.02 to -0.08
NM	-0.25**	-0.02	-0.23**	-0.23**	0.00	-0.23**	Less than -0.08
NV	-0.07	-0.12*	0.06	-0.03	-0.10*	0.07	
NY	0.22**	0.12**	0.10	0.12*	0.11**	0.00	
NYC	0.08*	0.10**	-0.02	-0.02	0.02*	-0.04	
OH	-0.02	-0.06**	0.05	0.00	-0.03	0.03	
OR	‡	-0.05*		‡	-0.06**		
PA	-0.04	-0.04	0.01	-0.03	-0.02	-0.01	
TX	-0.20**	0.01	-0.21**	-0.04**	0.03**	-0.07**	
UT	-0.04	-0.06**	0.03	0.01	-0.04**	0.05	
WI	-0.10	0.02	-0.12	0.02	0.03*	-0.01	

* Significant at the 0.05 level. **Significant at the 0.01 level.

‡ Data suppressed as number was result of single school.

Only eight states have charter schools associated with both a CMO and a VOS. Of these, the noticeable standouts are Florida and New York City. In Florida, the Hybrid charter schools have much stronger growth than the non-Hybrid-affiliated charters. The difference in math effect sizes for Florida is 0.14, approximately 80 days of additional learning. In New York City, the effects for Hybrid schools are weaker than those of non-Hybrid schools by -0.10 in math and -0.08 in reading.

¹¹ Blank values indicate no student attending a VOS took a test in the subject in that state. This is usually because the state does not have VOSs, but could also be because VOSs in the state serve only non-tested grades.

Table 9: Performance of Hybrid and Non-Hybrid schools by State, Math and Reading

	HYBRID Math	Non- HYBRID Math	Difference Math	HYBRID Reading	Non- HYBRID Reading	Difference Reading	
AZ	-0.05*	-0.01	-0.04	-0.07	0.02**	-0.09	Math
FL	0.12**	-0.01	0.14**	0.11**	-0.01	0.11**	More than 0.08
IL	0.01	0.02	-0.01	0.02	0.01	0.00	0.02 to 0.08
MI	0.09*	0.05**	0.05	0.12**	0.07**	0.05**	-0.02 to 0.02
NC	0.08	0.01	0.07	0.02	0.03**	-0.01	-0.02 to -0.08
NY	0.13	0.13**	0.00	0.06	0.12**	-0.06	Less than -0.08
NYC	0.00	0.10**	-0.10*	-0.06*	0.02*	-0.08**	
OH	0.02	-0.06**	0.08*	0.00	-0.03	0.02	Reading
							More than 0.08
							0.02 to 0.08
							-0.02 to 0.02
							-0.02 to -0.08
							Less than -0.08

* Significant at the 0.05 level. **Significant at the 0.01 level.

Subpopulations

Exploring deeper into the performance question of schools requires us to examine the various subpopulations served by schools. In past studies of charter schools, CREDO has found evidence that students of different racial-ethnic backgrounds receive different impacts on academic growth from attending charter schools (Cremata et al. 2013). It has become standard practice for CREDO to report academic growth by racial-ethnic groups. Part of the motivation for the separate look at each student subgroup stems from the explicit mission of some charter school operators to work with “underserved” populations, those whose students have historically fared poorly in TPS.

Tables 3 and 4 in the previous section provide detailed breakouts of charter student demographics. Charter schools tend to serve a higher percentage of black students and a lower percentage of white students than TPS. Charter schools which are part of a CMO organization tend to serve higher percentages of Hispanic students, but not necessarily more ELL students. The remaining races are represented in charter school enrollment at a rate similar to TPS.

Black Students

The shortcoming of the traditional education system when it comes to serving minority students has long been documented in the United States. Many charter schools are established specifically to serve the unmet needs of black and Hispanic students. Charter schools are touted by many supporters as a means for minority students, especially those in the inner cities, to escape from low-performing TPS. Because an improved outcome for traditionally underserved communities is a major goal of many charter school networks, we place particular focus on these results.

Figure 23: Impact of CMO Charter Attendance for Black Students, Math



For black students attending a charter school, the results are both encouraging and disappointing. Black students attending school in all sectors experience growth which is significantly weaker than white TPS students. The magnitude of the growth difference is disturbing as well. In Figure 23, the 0.00 line represents the average growth of a white student in a TPS setting. The bar on the left is an estimate of the growth of the average black TPS student. The effect size for black TPS students is -0.20, which equates to approximately 114 days less learning than white TPS students. Black students attending a charter school have on average better growth than black students attending a TPS. For black students in a CMO the effect size is -0.13 or 74 days less than white TPS students. The effect size for black students in a non-CMO charter is -0.15 or about 86 days less learning. Figure 23 shows a typical black student will likely get the strongest growth from attending a CMO charter school.

The results for black students attending a VOS school or a Hybrid school are similar to the CMO schools. Black students in VOS charters have an effect size of -0.14 and black students in a Hybrid-affiliated school have an effect size of -0.15.¹² It is disappointing that the best option for black students is to attend a

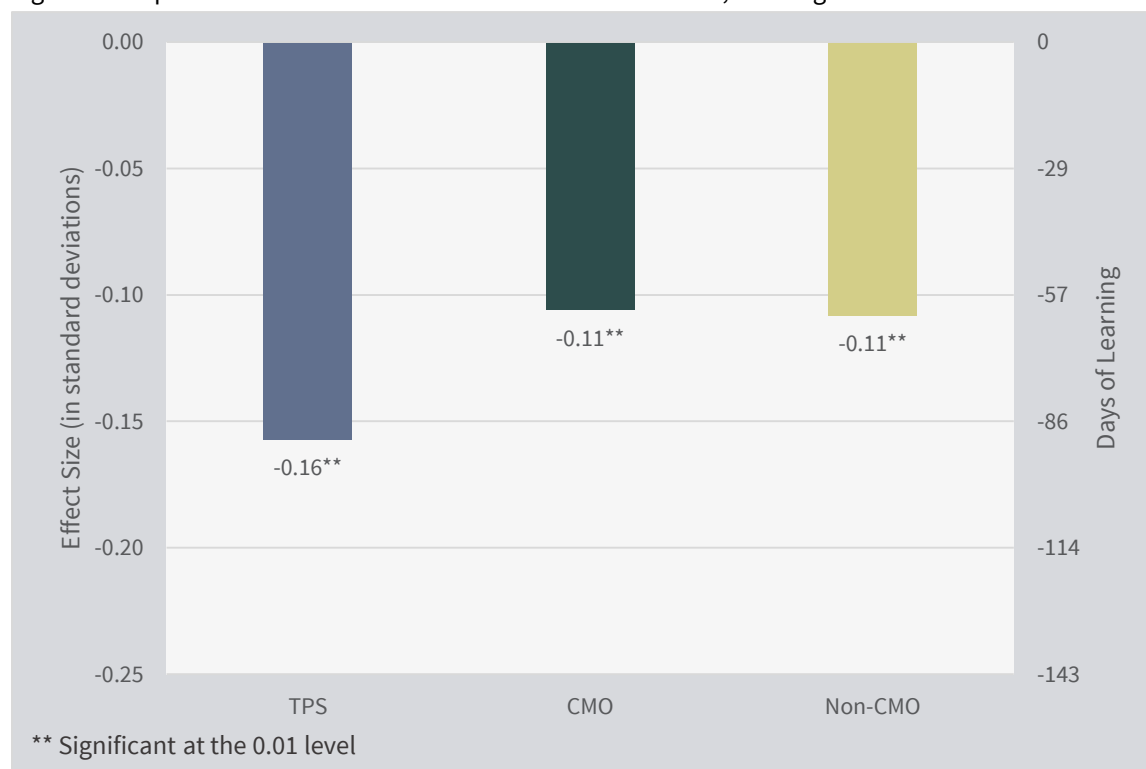
¹² Full results are available in the data appendix.

charter school in which they will fall behind white TPS students by “only” 74 days compared to the 114 days they fall behind in a TPS setting.

Reading outcomes for black students tell a similar tale. Black students attending a school in a TPS setting display on average growth which is a -0.16 effect size compared to white TPS students. The numbers are better for black students attending a charter school, but still weak compared to white TPS students. A black student attending a CMO will have growth 0.05 or 29 days stronger than a black student in TPS.

For reading, the effect size for CMO charters is not significantly different from that for black students attending non-CMO charters. Figure 24 shows that black students attending a charter school, CMO and non-CMO, have an annual effect size of -0.11 or 63 days weaker growth compared to white TPS students. Effect sizes for black students in VOSs and Hybrids were similar to effects for CMO at -0.11 and -0.12 respectively. As with math, the effect of attending a charter school compared to a TPS was significantly positive for black students; yet, black students still have significant room for improvement.

Figure 24: Impact of CMO Charter Attendance for Black Students, Reading



Hispanic Students

Another population which has been historically underserved is Hispanic students. Hispanic students are a diverse population with some students requiring additional assistance due to difficulties with English language proficiency. But even outside the English language learner community, which will be discussed

below, Hispanic students have traditionally lagged behind their white peers in TPS settings. As with black students, many charter schools have made providing support to Hispanic students a core part of their mission. Charter school effects for Hispanic students produce a more hopeful picture than the results for black students.

Hispanic students attending a TPS have on average growth which is -0.10 compared to TPS white students. This is to say the average Hispanic student will have annual growth equal to approximately 57 fewer days per school year compared to a white peer. For Hispanic students in CMO-affiliated charter schools, the deficit shrinks to -0.04 or about 23 fewer days of learning per 180-day school year. Figure 25 shows that the results for Hispanic CMO students are 0.06 stronger than for Hispanic TPS students.¹³ This would be equivalent to about 34 days of additional schooling or almost seven weeks. Hispanic students who attend a non-CMO charter school also have growth which is significantly stronger than their Hispanic peers in TPS.

Figure 25: Impact of CMO Charter Attendance for Hispanic Students, Math

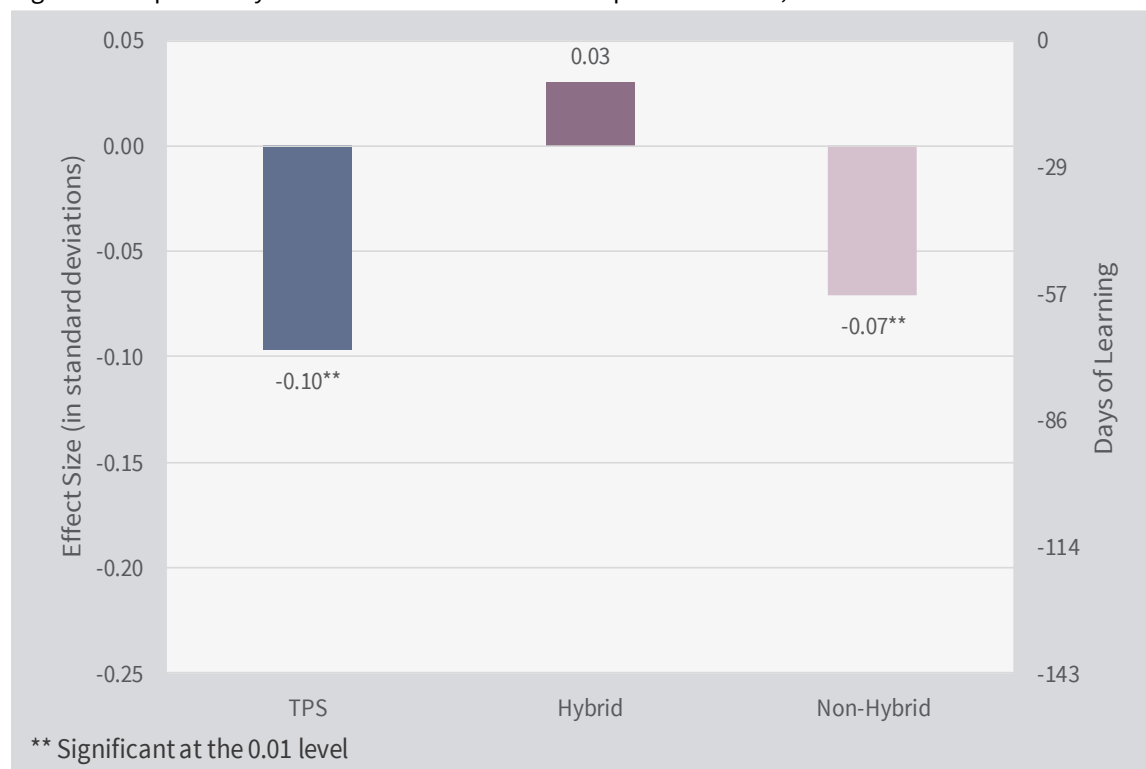


Results for Hispanic students attending VOS charter schools is somewhat weaker than for CMO charters. The math effect size for VOS schools is -0.07 compared to -0.04 for CMO and -0.10 for TPS. The brightest

¹³ Subtracting the -0.04 CMO value from the -0.10 TPS value gives a difference of 0.06.

result in math for Hispanic students comes from the Hybrid schools. Hispanic students attending a charter school associated with both a CMO and a VOS have growth which is not only stronger than Hispanic students in TPS, but is not significantly different from white TPS students (see Figure 26). Sadly, the Hybrid affiliated schools also make up the smallest sector of charter schools.

Figure 26: Impact of Hybrid Charter Attendance for Hispanic Students, Math



Reading results for Hispanic students provide a much more positive outlook. Not only do Hispanic students attending a charter school in any sector have stronger growth than Hispanic students attending traditional public schools, but also Hispanic students attending a VOS and those attending a Hybrid school have growth which is equal to or significantly stronger than that of white TPS students.

Figure 27 displays the reading effects for Hispanic students attending TPS, CMO charter schools, and non-CMO charter schools. Hispanic students attending a traditional public school typically have growth which lags behind their white peers by -0.07, which is almost 40 days. However, Hispanic students attending a non-CMO charter school lag by -0.04, or 23 days; Hispanic CMO students lag by only -0.02, or 11 days per school year. Results for Hispanic students in VOS schools are not significantly different than for white TPS students.

Figure 27: Impact of CMO Charter Attendance for Hispanic Students, Reading

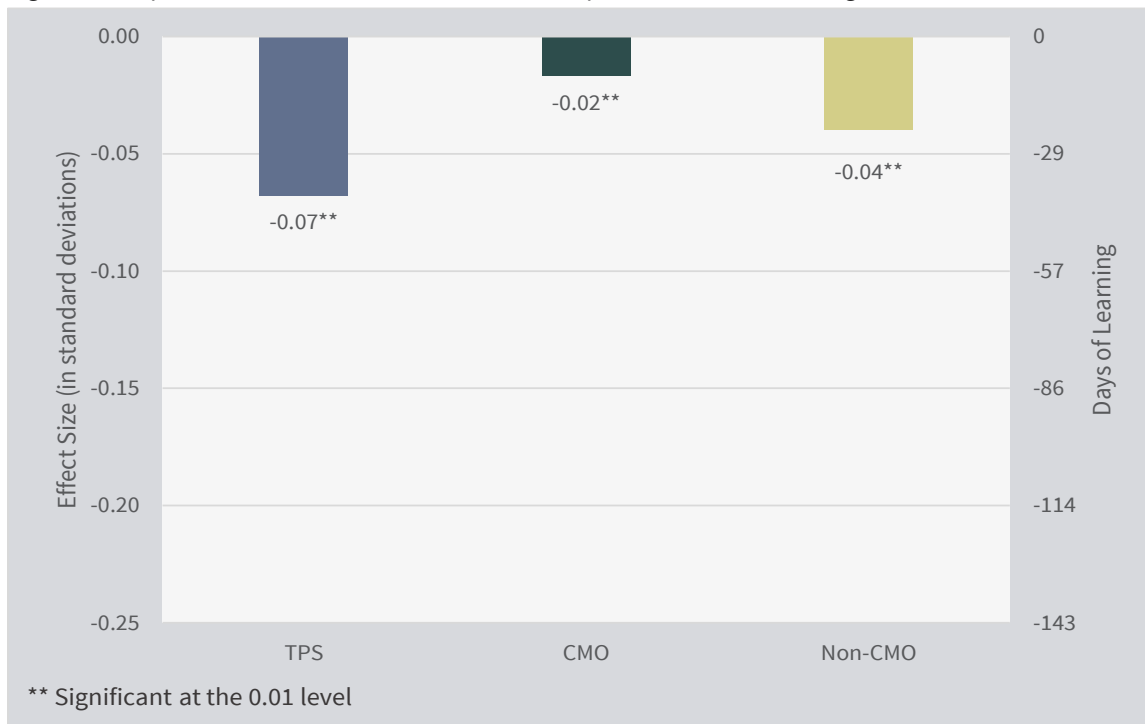
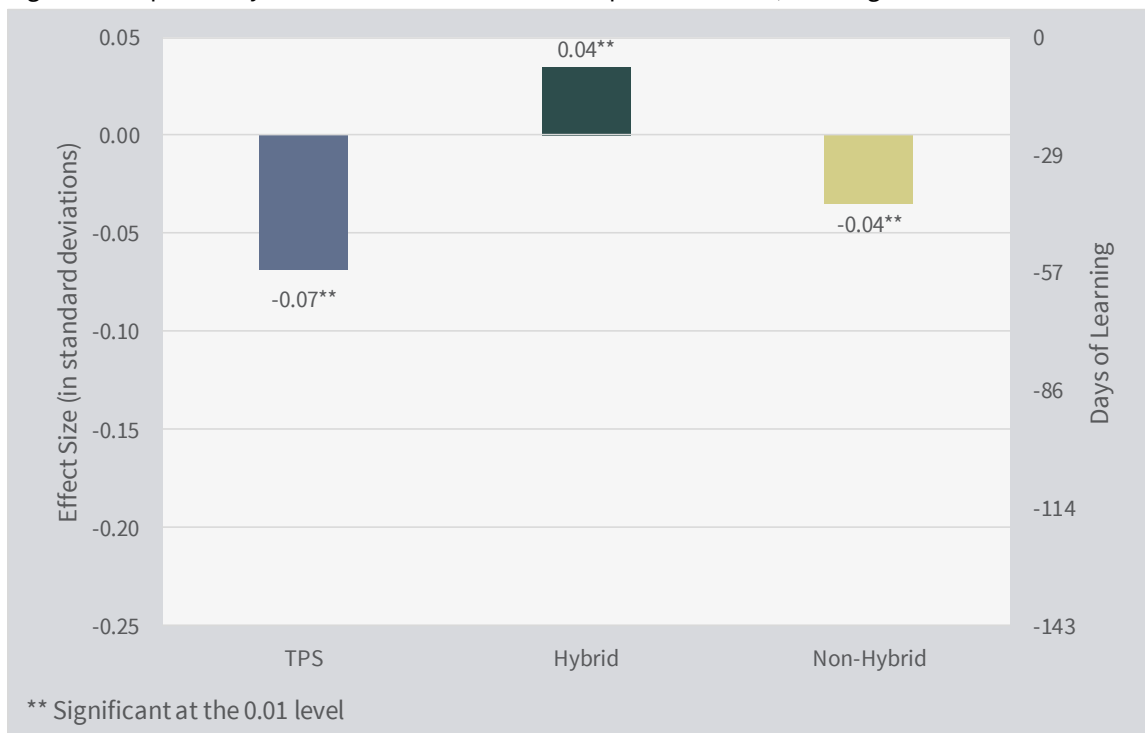


Figure 28: Impact of Hybrid Charter Attendance for Hispanic Students, Reading



Finally, Hispanic students attending a Hybrid charter school have growth which is 0.04 stronger than that of white TPS students (see Figure 28). This means this small selection of schools is closing the achievement gap between Hispanic students and white TPS students in reading.

Race-ethnicity is not the only student characteristic which commonly has an impact on students' academic growth. Students in poverty, those who are English language learners, and special education students also often have academic growth which differs from the typical comparison student.

Students in Poverty

The average growth for students in poverty is generally lower than that for students in the same sector who are not in poverty. Through the use of statistical models, we isolate the relationship between poverty and growth. This leaves a picture of the difference in the impact of charter attendance on students in poverty compared to similar students who are not in poverty. The effect sizes for charter students in the poverty/growth graphs consist of two pieces of information. The first portion of the effect size represents the average impact of attending a charter school in a particular sector. The remainder of the effect size represents the average difference between being a charter student in poverty and a charter student not in poverty. The total length of the bar is the average expected impact on growth of being a charter student in poverty compared to being a TPS student who is not in poverty.¹⁴

Figures 29 through 34 show that being a student in poverty usually results in lower academic growth in both math and reading for all student groups. Figures 29 and 30 show the most common outcome with CMO charter students in poverty having significantly weaker growth than non-poverty TPS students, but significantly stronger growth than TPS students in poverty. On average, a student in poverty would experience 34 days of additional math growth in a CMO charter as compared to the expected experience in a TPS setting and 23 more days in reading. In both reading and math, non-CMO charter students in poverty have growth which is not significantly different from TPS students in poverty.

¹⁴ We use a Wald test including coefficients weighted by race/ethnicity, poverty, special education status, English language learner status and retained status to determine significance of the combined charter special status effect size compared to TPS non-special status and TPS special status VCRs.

Figure 29: Impact of CMO Charter Attendance for Students in Poverty, Math

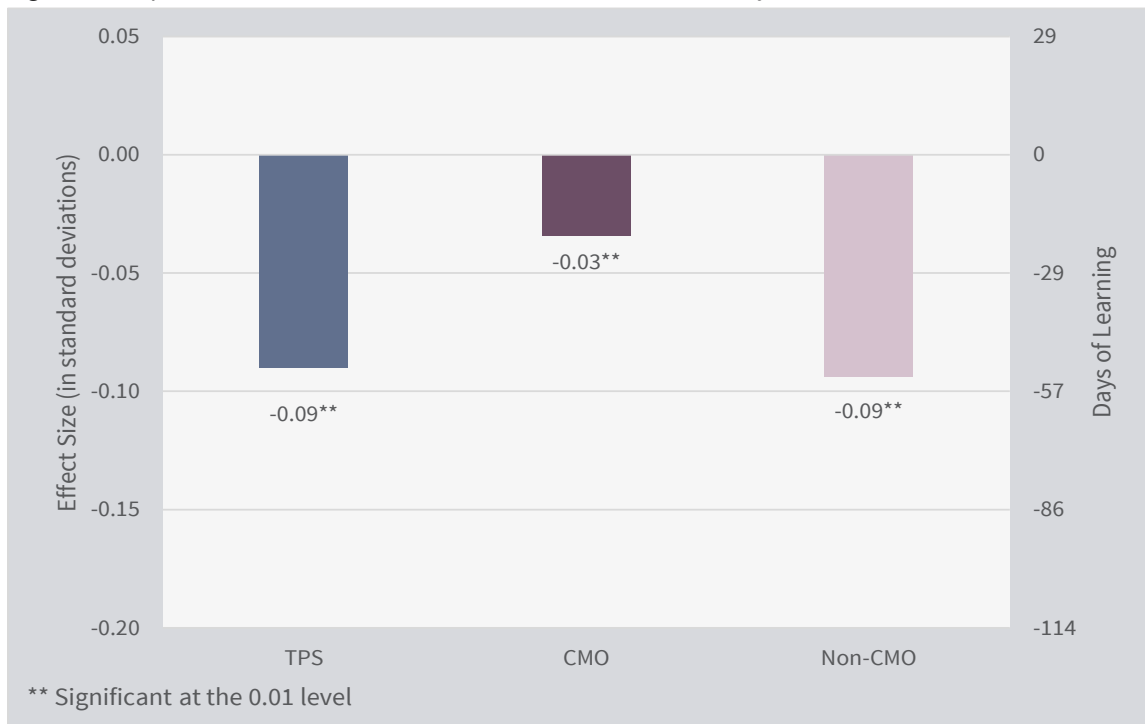
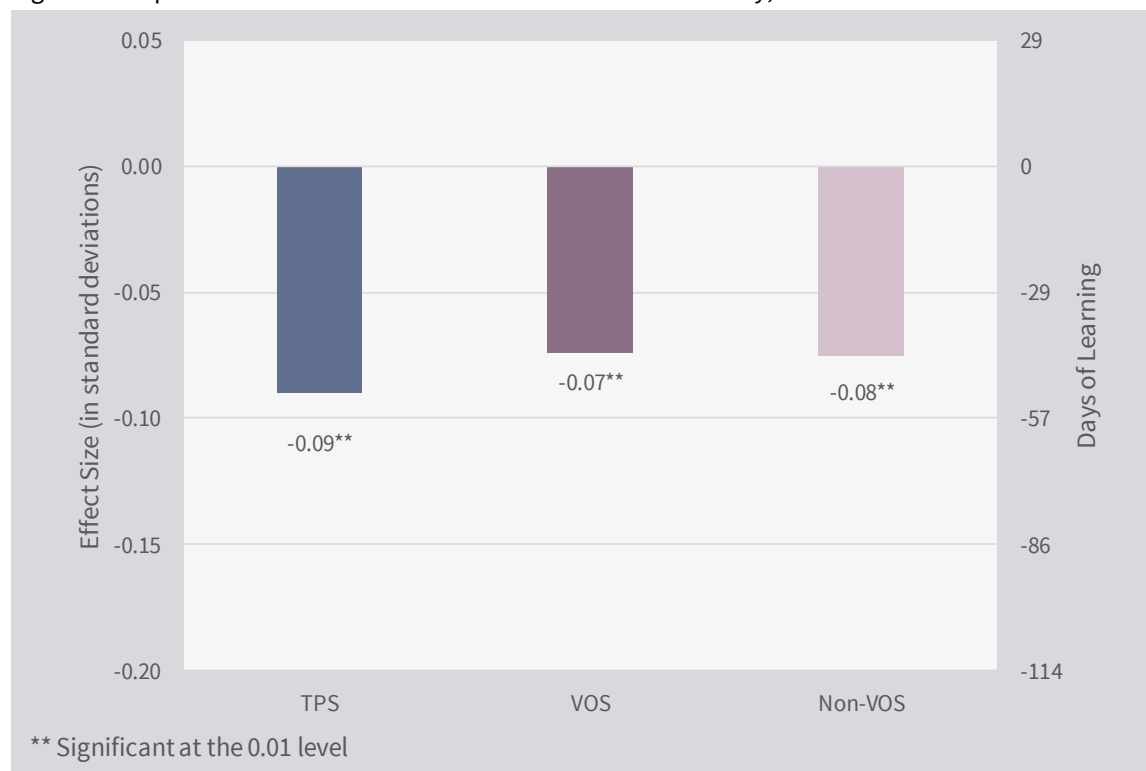


Figure 30: Impact of CMO Charter Attendance for Students in Poverty, Reading



Results for VOS charter students in poverty are weaker than those for CMO charter students. VOS charter students experienced math growth, Figure 31, which is not significantly different from the expected growth for TPS students in poverty or non-VOS students in poverty. That is to say, -0.09 and -0.07 are not statistically different from each other nor from -0.08.

Figure 31: Impact of VOS Charter Attendance for Students in Poverty, Math



VOS charter students in poverty have reading growth which is -0.05 weaker than TPS non-poverty students (see Figure 32). This is equivalent to approximately 29 days less growth per year. The effect size for TPS students in poverty is -0.08 or 46 days weaker growth. While the negative effect size for VOS students in poverty is only -0.05 compared to -0.08 for TPS students in poverty, the difference between the two effect sizes is not significant. Therefore, we state that the two effect sizes are essentially not significantly different as the difference could be due to chance. When given the option of attending a TPS school or a VOS school, a student in poverty will likely have similar outcomes regardless of which is chosen.

Figure 32: Impact of VOS Charter Attendance for Students in Poverty, Reading



For Hybrid charter schools, Figures 33 and 34, the difference between being a student in poverty and a student not in poverty is about the same within the sectors; however, the average Hybrid effect is more positive than the negative effect of being in poverty for Hybrid students. This means while Hybrid students in poverty have weaker growth than their non-poverty peers in Hybrid schools, they have 11 days stronger math growth and five days stronger reading growth than TPS non-poverty students on average (see Figures 33 and 34). In theory, these schools are “closing the achievement gap” between their poverty students and non-poverty TPS students. But since the difference in growth is small, truly closing the gap will take more years than students spend in school. That being said, these schools should still be recognized for the strong growth of their students in poverty.

Figure 33: Impact of Hybrid Charter Attendance for Students in Poverty, Math

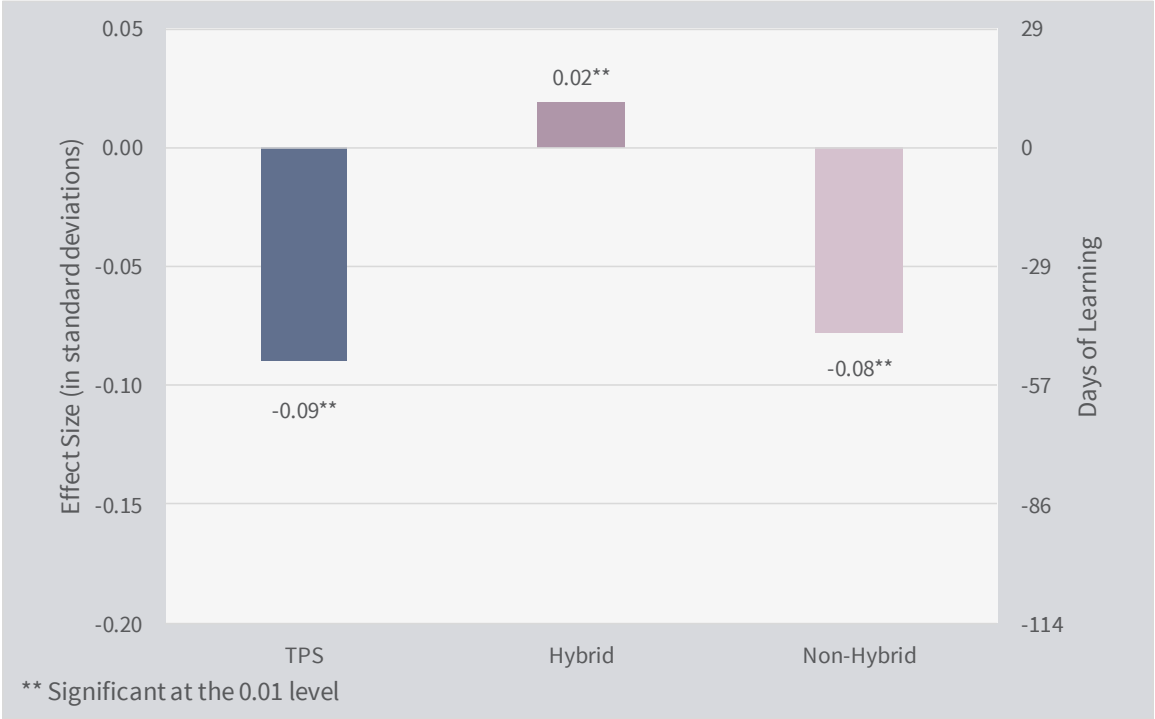
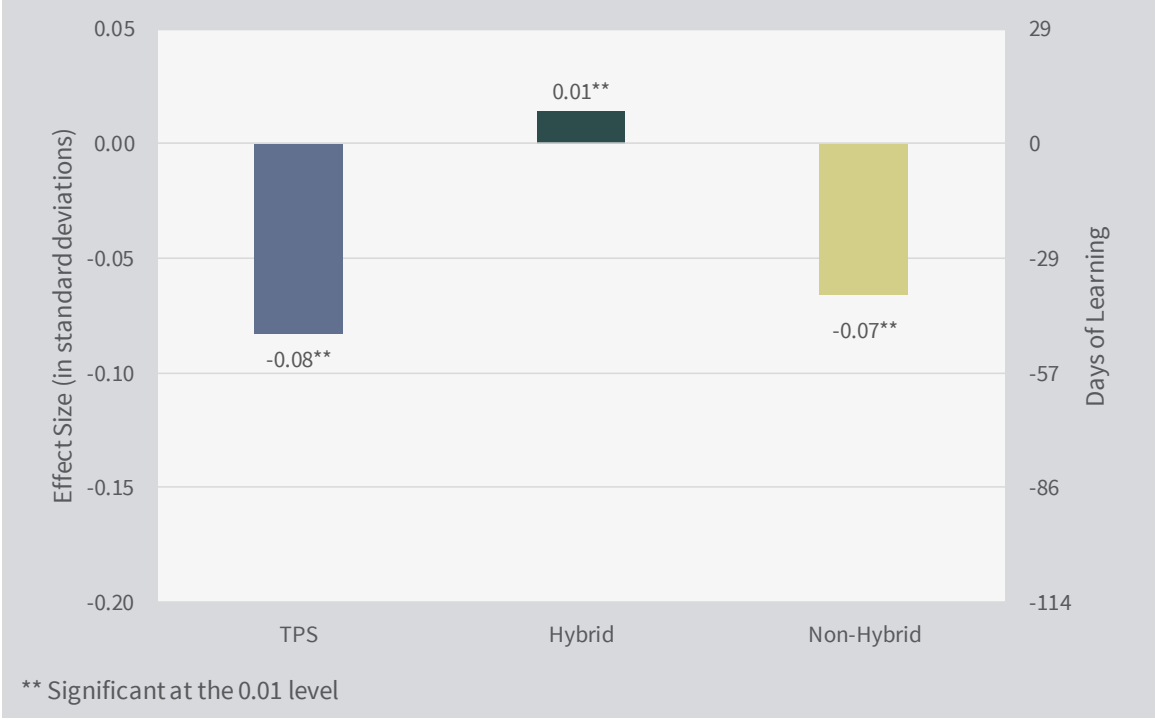


Figure 34: Impact of Hybrid Charter Attendance for Students in Poverty, Reading

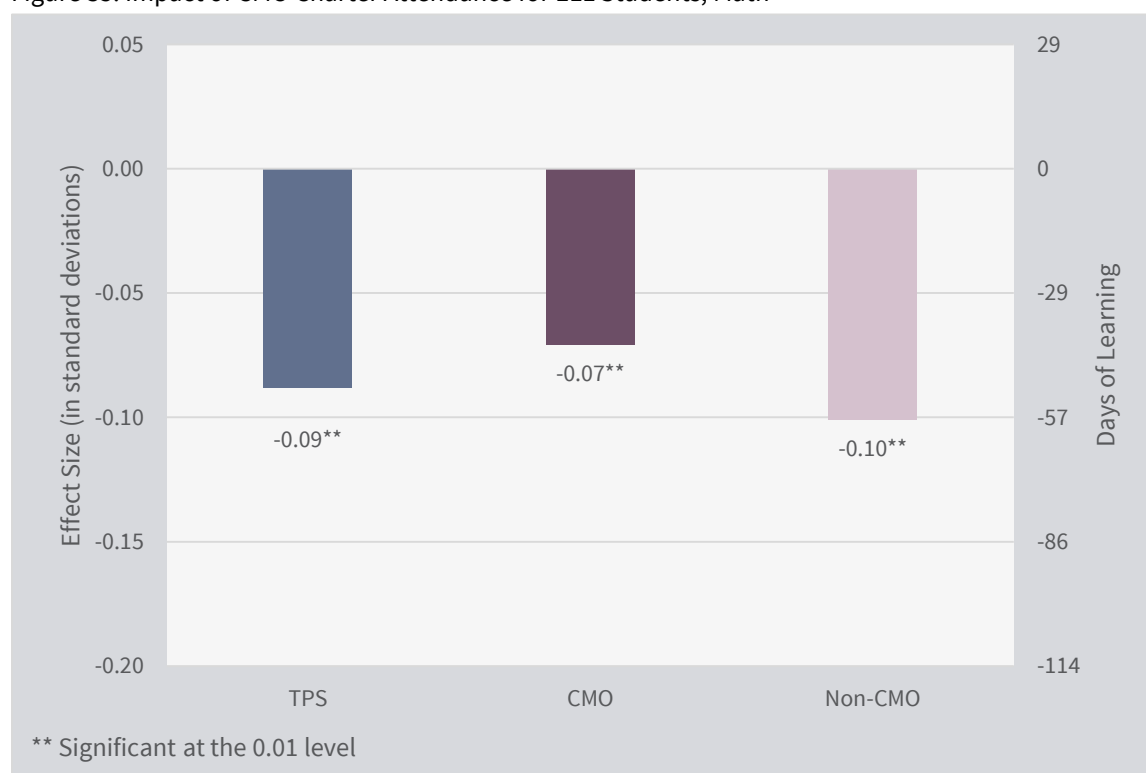


English Language Learners

Students who are English language learners (ELL) also tend to progress academically more slowly than students whose primary language is English. In each sector, ELL students have growth which is significantly weaker than their non-ELL peers. The difference between ELL students and non-ELL students in the same sector ranges from -0.03, 17 days less, in reading for Hybrid students to -0.12, 68 days less, for students attending a VOS charter school.

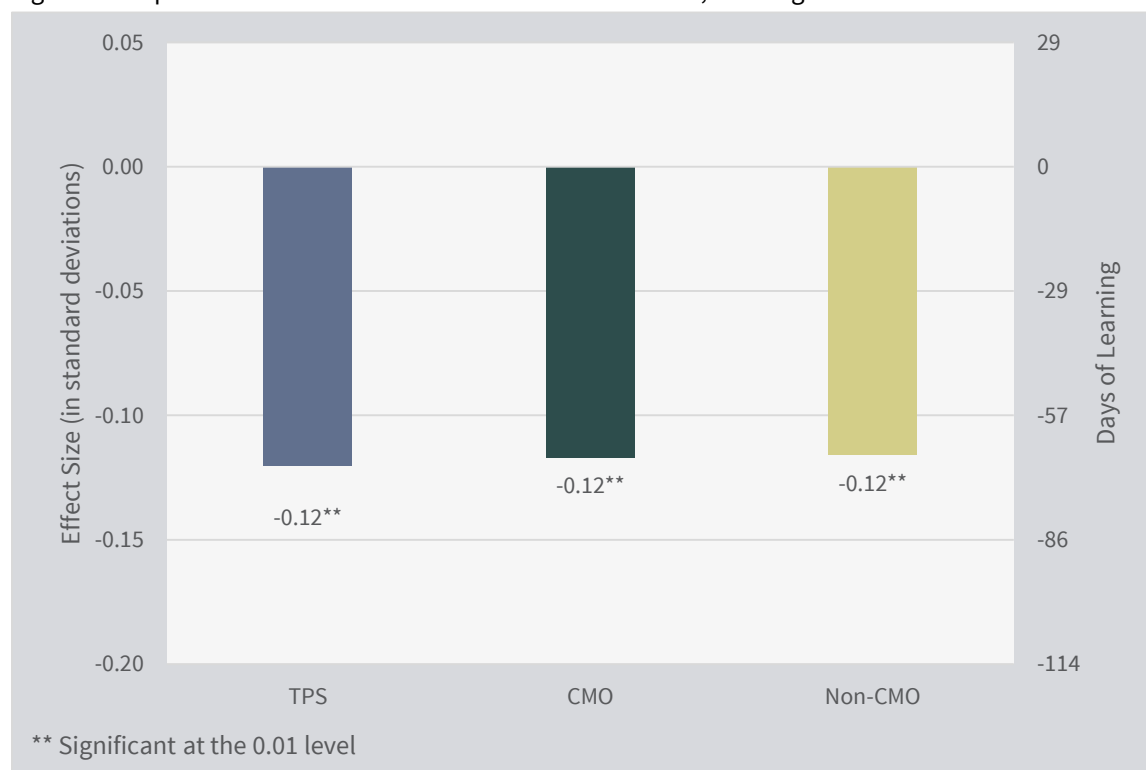
As with students in poverty, the most important question is not how ELL students perform compared to non-ELL students in the same sector, but how ELL students in one sector compare to ELL students in another sector. Focusing on the second comparison allows stakeholders to estimate in which setting ELL students will likely fare best. For math, CMO charter ELL students and TPS ELL students both lag behind their non-ELL peers, but the two groups have growth which is not significantly different from each other. CMO ELL students have math growth which is significantly stronger than non-CMO charter students. The difference between the two is 0.03 or about 17 days difference. The effect for non-CMO charter ELL students is similar to the effect for TPS ELL students.

Figure 35: Impact of CMO Charter Attendance for ELL Students, Math



For reading, ELL students across all three sectors have overall growth which is not significantly different between the sector and TPS ELL students. ELL students tend to experience reading growth which is about 68 days weaker than TPS non-ELL students regardless of which type of school they attend (see Figure 36).

Figure 36: Impact of CMO Charter Attendance for ELL Students, Reading

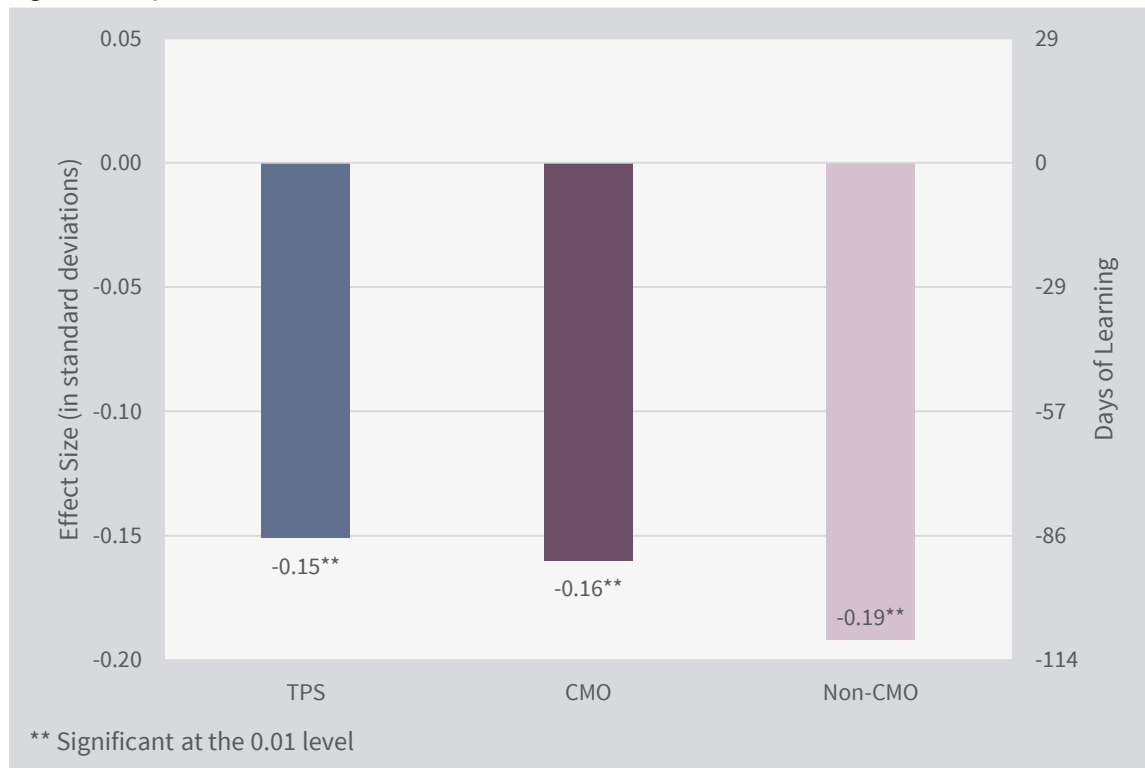


Special Education Students

The final special status group of students examined are students receiving special education services from their schools. For this analysis, the special education students included in the analysis are those who still took the standard examination with minor to no accommodations. Most states have an additional test for students whose special needs are so great they must be tested using a heavily modified test form. These students taking the separate accommodated form of the test are excluded from this analysis.

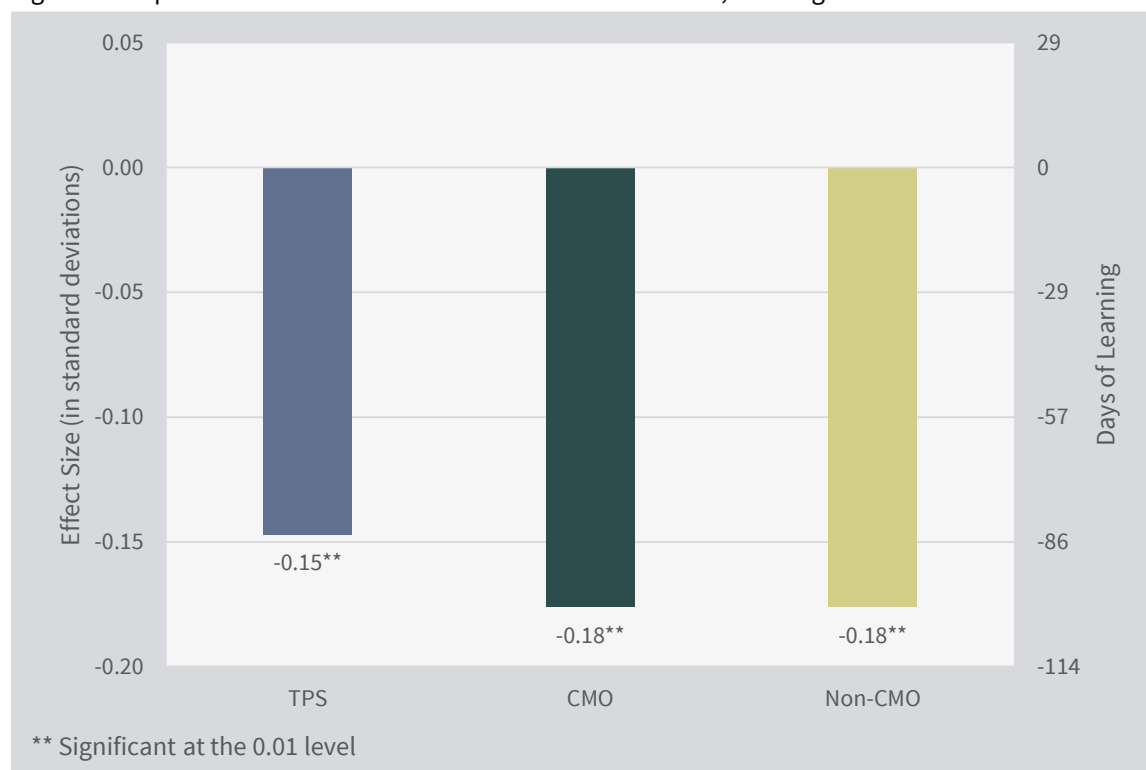
For all sectors of schools, a student who receives special education services lags behind non-special education peers by a large amount. In Figure 37, each bar represents the difference between non-special education students and special education students in math. For CMO math, special education students grow from -0.15 or 86 days less in math than TPS students to -0.19 or 108 days less for non-CMO charter students. Special education students in TPS have better overall growth than their special education CMO peers. Even though the effect size difference is small at 0.01 or six days, the effect is still statistically significant. The difference in reading between special education effect sizes for TPS students and CMO charter and non-CMO charter special education students is larger at 0.03 or 17 days.

Figure 37: Impact of CMO Charter Attendance for SPED Students, Math



For special education students in reading, the TPS sector has better results than either CMO charters or non-CMO charters. Figure 38 shows that a special education student attending a TPS will have reading growth which is 0.03 or 17 days stronger than if the special education student attends a charter school. Outcomes for CMO charter and non-CMO charter students will be similar.

Figure 38: Impact of CMO Charter Attendance for SPED Students, Reading



Results for the VOS/non-VOS charter sectors were similar to those found for CMO charter schools. However, among charter schools affiliated with both a CMO and a VOS, math growth of special education students was significantly stronger than math growth for special education students enrolled in TPS by a value of 0.05 or 29 days (Figure 39). Non-Hybrid special education students' growth lagged behind the growth of TPS students by 0.04 effect size. For the special education population, enrollment in one of the Hybrid charter schools could be expected to produce the strongest outcomes.

The pattern for special education students was similar in Hybrid reading as seen in Figure 40, although the differences in effect sizes are slightly smaller. The Hybrid special education students outgrow TPS special education students by 0.03. The non-Hybrid special education students have the weakest growth of the three groups at -0.18, which is -0.05 behind TPS special education students.

Figure 39: Impact of Hybrid Charter Attendance for SPED Students, Math

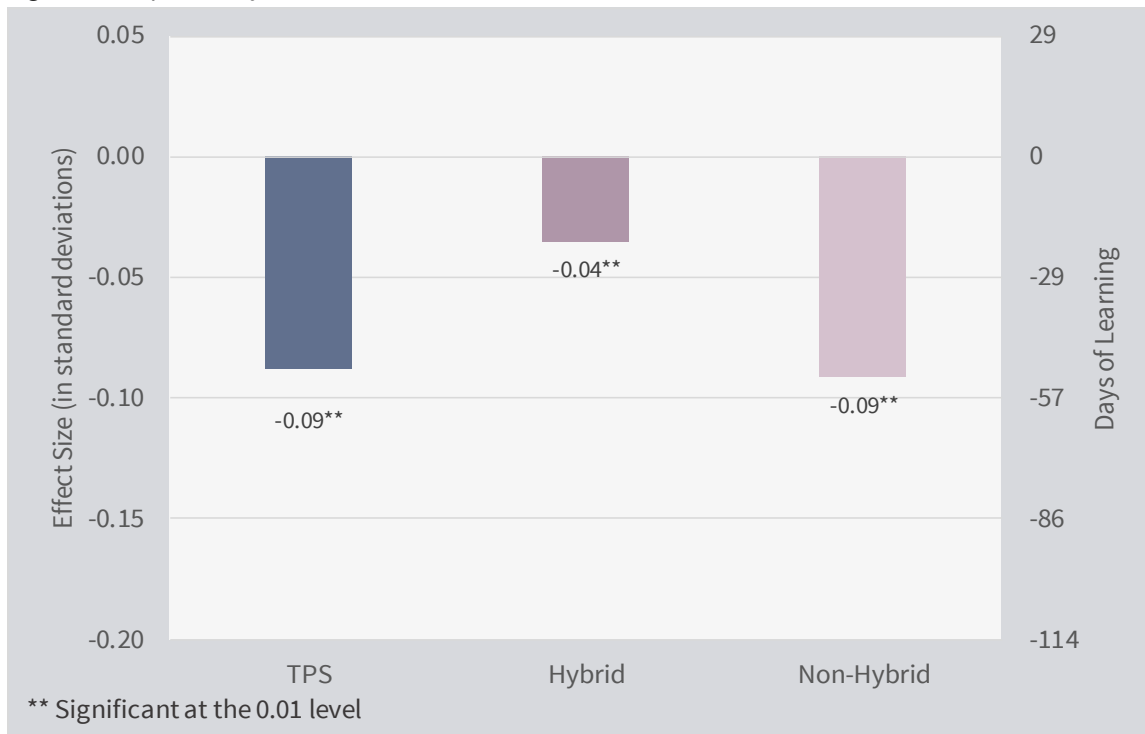
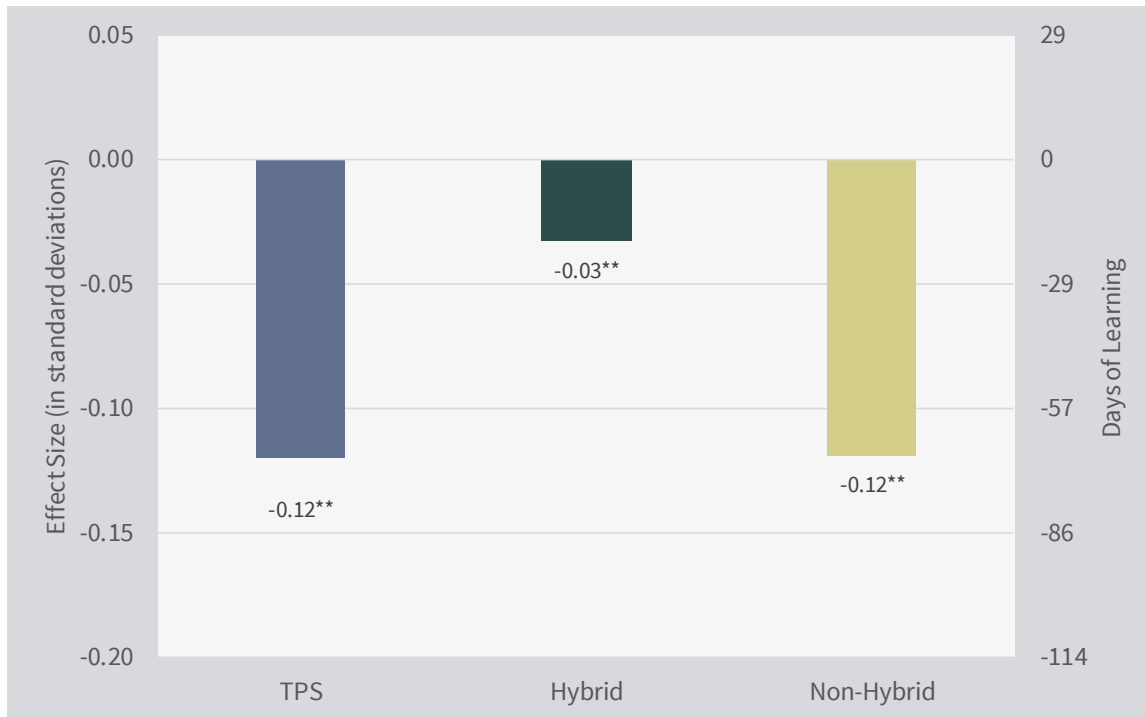


Figure 40: Impact of Hybrid Charter Attendance for SPED Students, Reading

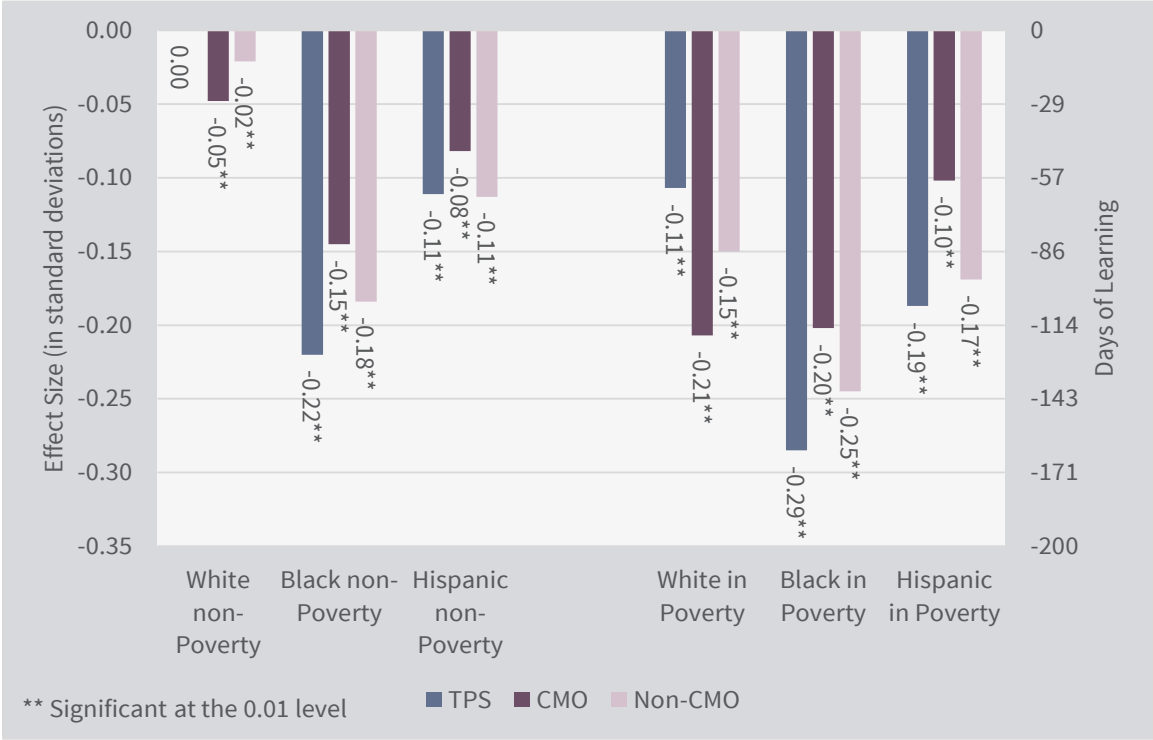


Minority Students in Poverty

As Figures 23 through 40 show, many students face hardships when it comes to educational opportunities. Minority students and those with special statuses such as poverty or ELL status have consistently weaker growth than their white non-special-status peers. When students have two or more of these characteristics, the negative impacts can often interact in such a way as to create a more extreme outcome. For example, Figure 41 shows black students in a TPS setting have an average effect size of -0.20. TPS students who are both black and in poverty have an effect size of -0.29. The difference between the two groups of black TPS students, those in poverty and those not in poverty, is an additional loss of 0.09 or 51 days of learning for those in poverty.

Figure 41 shows how these interactions between race/ethnicity and poverty can play out for a subsample of the data. Each group of bars represents growth of the shown subpopulation when that population enrolls in a particular sector of school as compared to white, non-poverty TPS students who have an effect size of 0.00. The blue bar in each set shows the effect size for students of that group enrolled in TPS schools; dark purple is CMO charters; and light purple is non-CMO charters. For black and Hispanic students, enrolling in a CMO sector school provides for stronger growth than the TPS or non-CMO sectors regardless of poverty status. Interestingly for Hispanic students in poverty, their growth is almost as strong in CMO charters as the growth of Hispanic non-poverty students in CMOs. The difference is only 0.02 (the difference between -0.10 and -0.08). This suggests CMO charters are particularly effective with Hispanic students in poverty.

Figure 41: Interaction of Race/Ethnicity and Poverty on Growth for CMO Students, Math



Results for students enrolled in VOS charter schools (Figure 42) show black students in VOSs have weaker growth than they would have in a CMO charter school (Figure 41). However, the VOS math results for black students and Hispanic students are stronger than growth for similar students in TPS.

Figure 42: Interaction of Race/Ethnicity and Poverty on Growth for VOS Students, Math

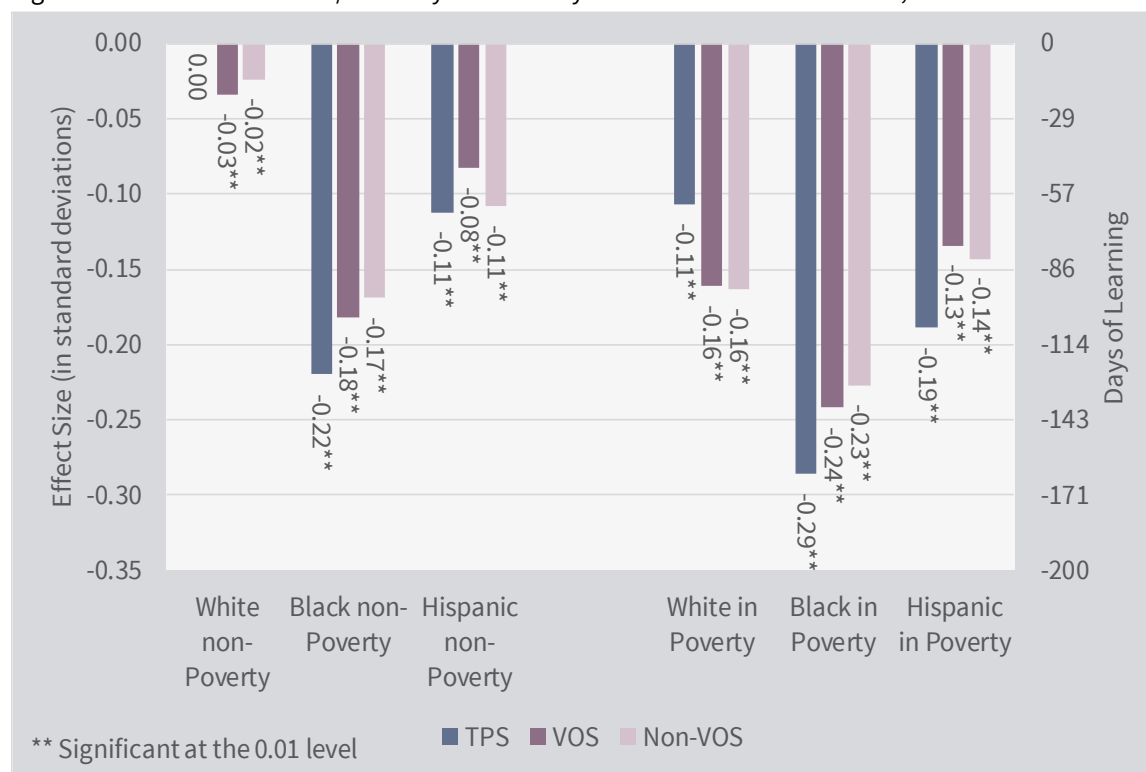
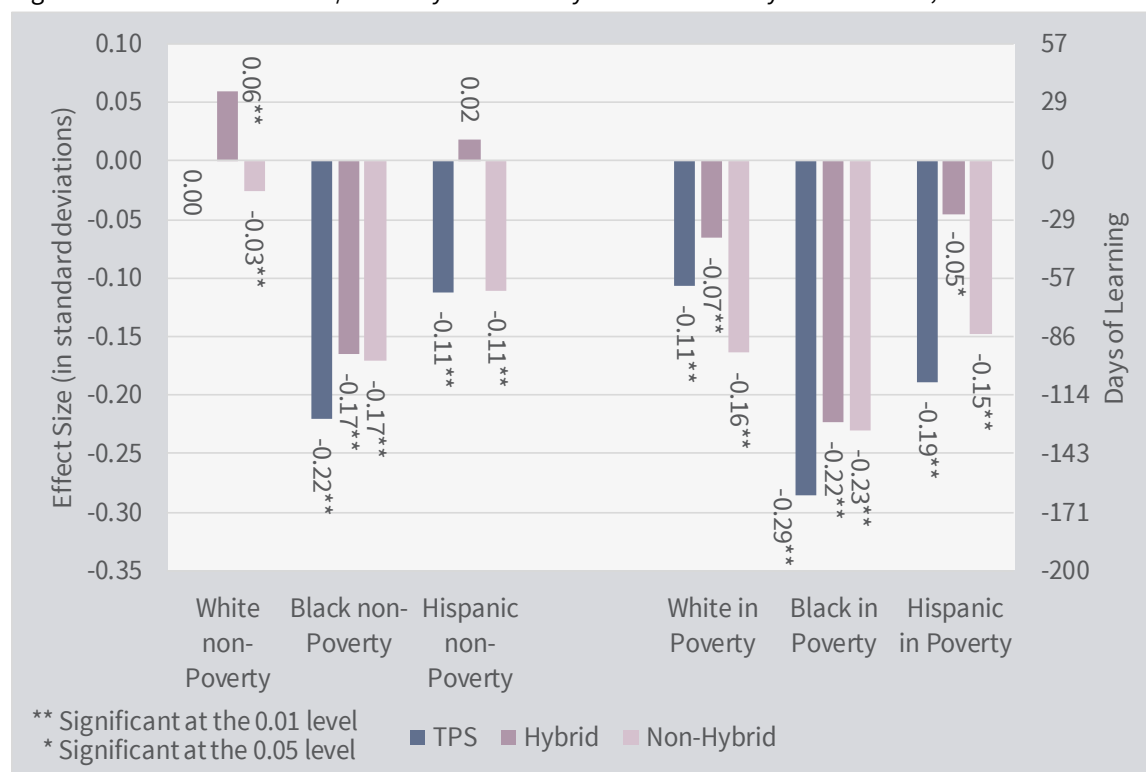


Figure 43 displays the math effect sizes for the same groups attending Hybrid charter schools. The Hybrid schools produce the strongest results for white and Hispanic students, especially those not in poverty. Results for black students attending Hybrid schools are similar to the effect sizes for black students attending a CMO charter school (see Figure 41).

Results in reading for race/ethnicity and poverty interactions follow the same pattern as the results for math. The reading results are available in the technical appendix.

Figure 43: Interaction of Race/Ethnicity and Poverty on Growth for Hybrid Students, Math

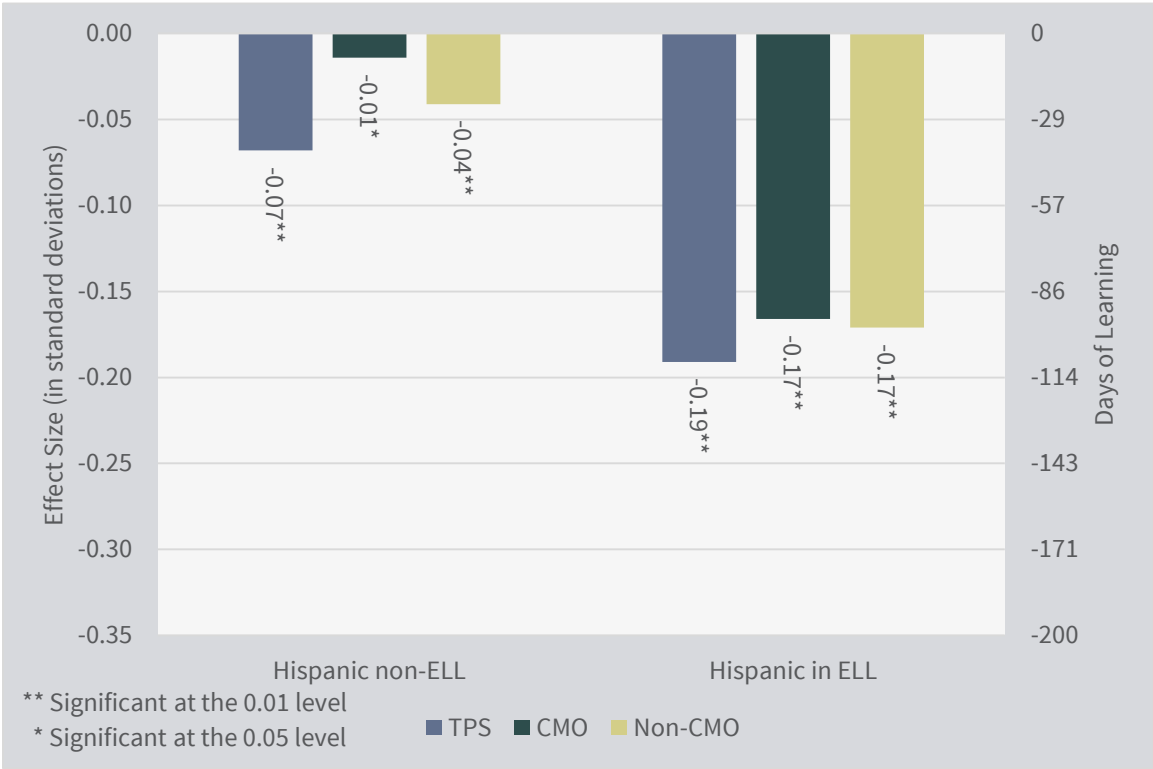


Hispanic Students and English Language Learner Status (ELL)

Hispanic students are a very diverse student subpopulation. Some Hispanic students belong to families who have been in the United States for generations. Other Hispanic students are the children of recent immigrants or are immigrants themselves. These two groups have very different educational needs and very different educational outcomes. An examination of Hispanic students divided by their status as English language learners provides some insight into these two groups within the Hispanic community.

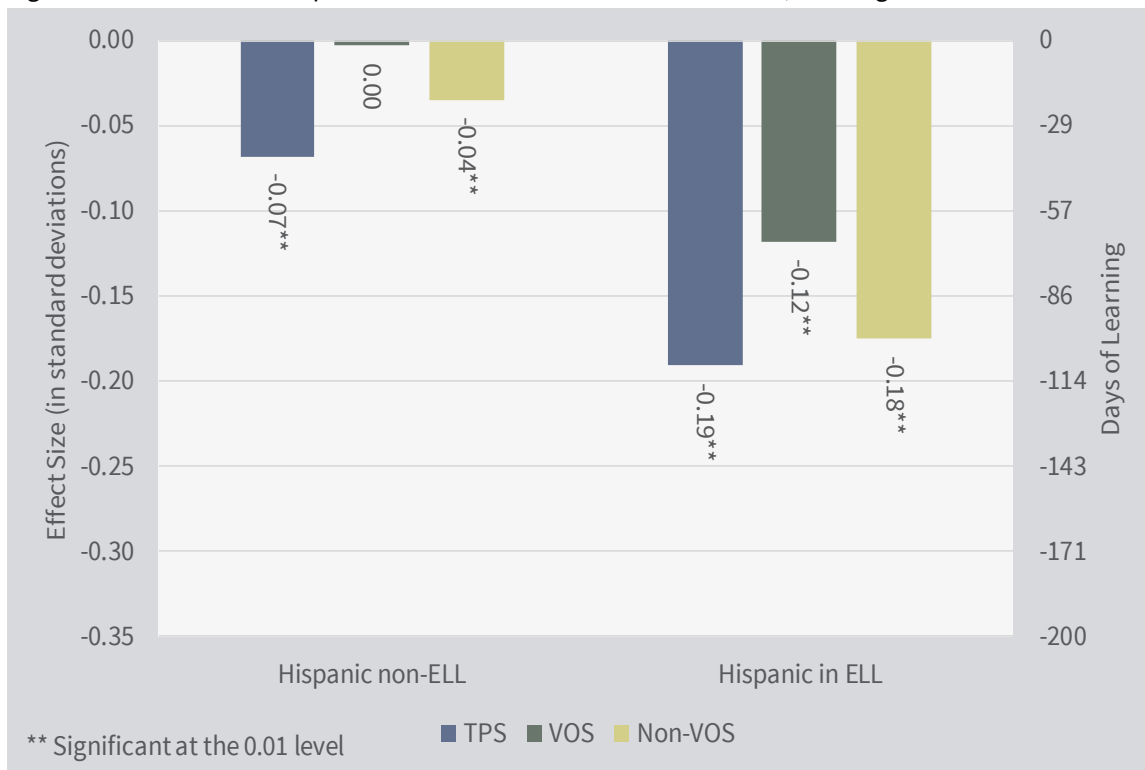
Figure 44 shows the reading growth effect sizes for Hispanic students who are ELL and Hispanic students who are not ELL based on attendance in TPS, CMO charter, or non-CMO charter. The obvious take-away from Figure 44 is the difference in growth based on ELL status. Hispanic students who are not ELL have growth which is much stronger than Hispanic ELL students. Hispanic non-ELL students attending a CMO have growth which is only -0.01 or six days per year weaker than white TPS students who serve as the 0.00 reference line. Hispanic ELL students in a CMO have growth which is -0.17 or 91 fewer days than white TPS students. Further, for Hispanic ELL students, the sector in which they are enrolled does not make a significant difference in their growth as the difference between -0.19 and -0.17 is not significant. Hispanic students who are not ELL have significantly stronger growth when they enroll in a CMO charter rather than TPS.

Figure 44: Interaction of Hispanic and ELL on Growth for CMO Students, Reading



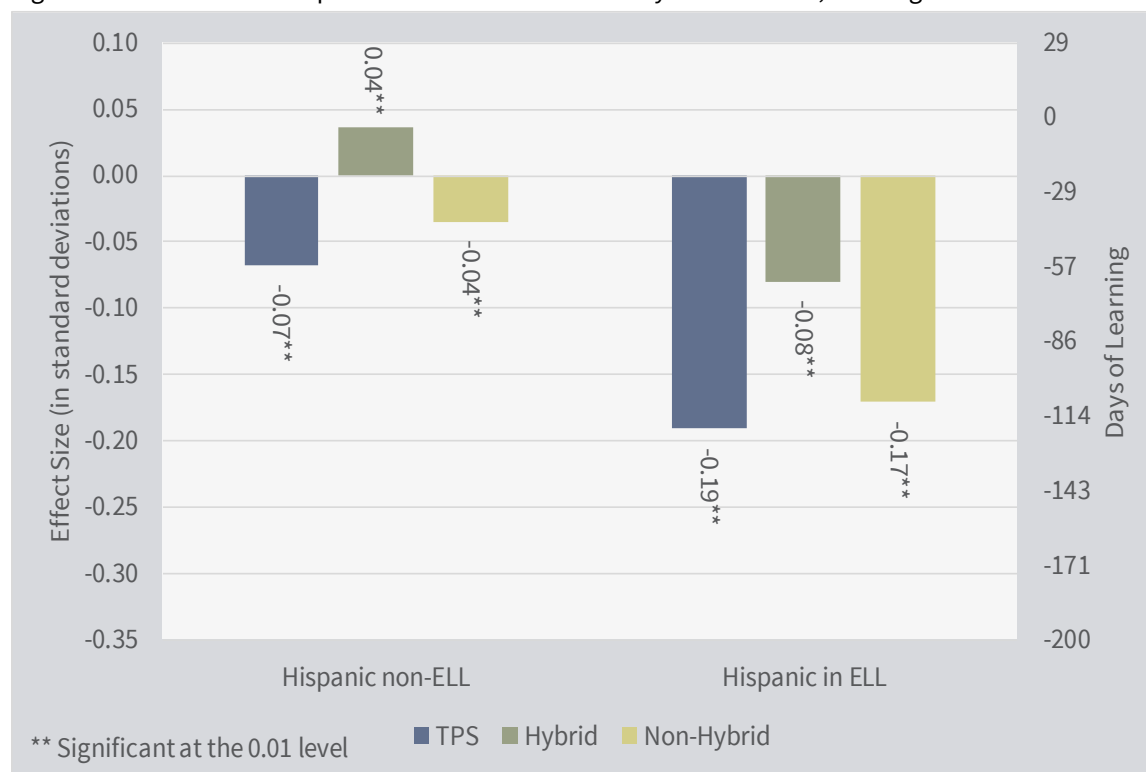
VOS charter schools show similar benefits for non-ELL Hispanic students as the CMO charter schools (see Figure 45). Hispanic non-ELL students enrolled in VOS schools have growth which is not significantly different from that of white TPS students. VOS charter schools do give a strong bump in growth to Hispanic ELL students compared to Hispanic ELL students attending TPS. The difference in effect sizes from Hispanic ELL students in TPS (-0.19) and Hispanic ELL students in VOS charters (-0.12) is 0.07 or about 40 days of learning. While Hispanic ELL students enrolled in VOS charter schools are still falling behind white TPS students, the deficit is much less on average than that seen by Hispanic ELL students enrolled in a TPS.

Figure 45: Interaction of Hispanic and ELL on Growth for VOS Students, Reading



Hispanic students – both ELL and non-ELL – have their strongest growth effects when attending a charter school affiliated with both a CMO and a VOS. Figure 46 shows Hispanic non-ELL students attending a Hybrid charter school outgrowing white TPS students. The non-ELL Hispanic students grow on average 23 more days in reading than white TPS students. Furthermore, both Hispanic ELL and non-ELL students have growth which is 0.11 or 63 days more growth than their Hispanic peers in TPS schools.

Figure 46: Interaction of Hispanic and ELL on Growth for Hybrid Students, Reading



As with the race/ethnicity poverty interactions, results for Hispanic ethnicity and ELL status show similar results for math as Figures 44 through 46 show for reading. The values for math are included in the data appendix.

Charter Schools Compared to TPS

Since the 2009 charter school study, CREDO reports have included a feature referred to as the quality curve. The quality curve uses a statistical model to compare each charter school to a virtual school consisting of the VCRs for students for that charter school. These school-level measures use a smaller growth period data window made of the last two growth periods.¹⁵ To minimize the statistical

¹⁵ California is not included in the quality curve analysis due to lack of data for 2013-14 and 2014-15.

inconsistencies which may arise from including schools with only a few students, we limit this analysis to schools with at least 30 tested students per year.

There are three groups within the quality curve:

- those schools with average growth statistically significantly weaker than that of their feeders
- those with average growth which is not statistically different from their feeders
- those schools with average growth statistically significantly stronger than their feeders

These three categories are distinct. The placing of a school into each category has a different meaning as to the performance of the school. As such, readers should resist the urge to combine categories from this analysis. Specifically, it is improper and can be misleading to state “x percent of schools performed stronger or no different than their local market” just as it is improper to combine the weaker and no different schools. These numbers should always be reported as three separate categories.

Figure 47: Charter School Quality Curve by Sector: Math

	worse	same	better
Independent	28	42	30
CMO	25	34	41
VOS	27	36	36
Hybrid	19	30	51

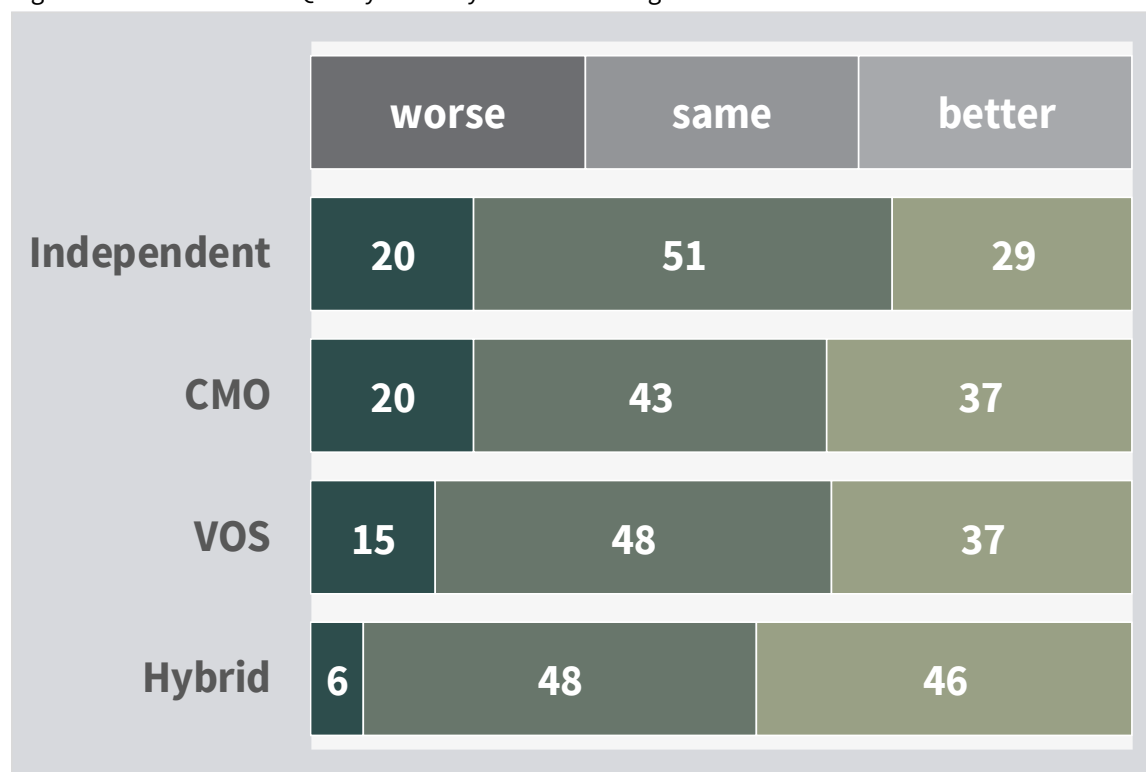
In Figure 47, the numbers in each cell represent the percentage of schools in each category for that sector. If all charter schools were performing at the same level as the traditional public school VCRs, 100 percent of the values would be in the “same” column. An even distribution across the quality curve with an equal number of schools doing worse than their comparison, same as their comparisons, and better than their comparisons would place 33 percent of schools in each category. VOS charter schools almost have this

equal distribution. Thirty-six percent of VOS charter schools have stronger growth than their comparison schools and 27 percent have weaker.

Growth for CMO charter schools is stronger overall. Forty-one percent of CMO charter schools have stronger growth than their TPS comparisons. Only 25 percent of CMO schools have average growth weaker than their comparisons. For schools which are part of both a CMO and a VOS, the results are even stronger. Half the Hybrid schools have stronger growth in math than their comparisons. Just 19 percent have weaker growth. All three charter network groups have stronger results than the independent charter schools.

The quality curve results for reading are given in Figure 48. The percentage of schools performing higher than their comparison schools is smaller for reading than it was for math. But so too is the percentage of charter schools performing worse. For CMO charters and VOS charters, just over a third of charter schools have stronger growth than their comparisons. For Hybrid charters, 46 percent have stronger growth. The real story in reading is the small percentage of charter schools with worse growth than their comparison schools. Only 6 percent of Hybrid charter schools have weaker growth. That is a strong finding, especially when combined with the fact 46 percent are stronger. The CMO sector and the VOS sector also have relatively small percentages of charter schools with weaker performance. While the CMO and independent charter sectors have the same percentage of schools with worse performance, the CMO sector has 8 percent more schools doing better than their comparison schools that the independent charter sector has.

Figure 48: Charter School Quality Curve by Sector: Reading



Growth and Achievement

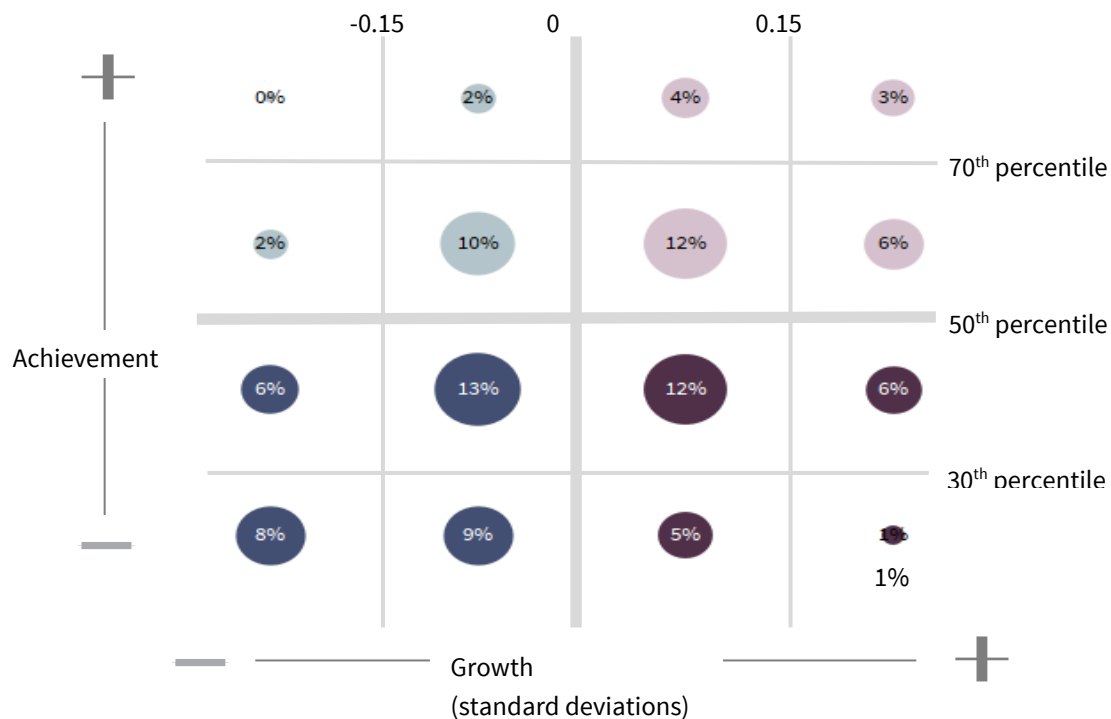
While the quality curve provides some insight into the growth performance of charter schools compared to their VCRs, it does not speak to achievement – or, more specifically, the interaction of growth and achievement. While it is preferable for all students to demonstrate strong growth, it may be acceptable for schools with a large percentage of high achieving students to have weaker growth, as the students may have chosen the charter school for reasons other than growth. Further, students with high achievement have less room to grow than low achieving students. Therefore, examining both growth and achievement provides a more nuanced, informative analysis.¹⁶

Figures 49 through 54 include two axes. The horizontal axis places the schools into four categories based on the average achievement for each charter school. The lighter colored cells above the axis have achievement stronger than average; the darker colors represent weaker achievement. The vertical axis divides the schools into four groups based on the growth effect size of the school. The purple cells on the right have stronger than average growth; the blue on the left have weaker growth.

¹⁶ California is not included in this set of analyses due to lack of data for 2013-14 and 2014-15. Louisiana is not included in this set of analyses due to data access issues.

Figure 49 presents the distribution of independent charter schools compared to their comparisons. Twenty-five percent of independent charter schools have high growth and high achievement. These schools are located in the top right, light purple quadrant. Twenty-four percent of independent charter schools are in the lower right quadrant. This means those schools have below average achievement but above average growth. Charter schools may have low achievement for a variety of reasons, but for schools with high growth, the most likely cause of low achievement is that those schools are taking in students who were academically lagging when they arrived. Being in a school with higher than average growth will eventually move these low achievement students above their state average if the school has enough time with the students. Fourteen percent of independent charter schools have high achievement but low growth. These are the light blue schools in the top left quadrant. While these schools should be closely watched to ensure their students do not begin to fall behind, this quadrant is not of as great concern because the students are doing well on average. The quadrant of schools which requires the most observation and perhaps intervention is the low achievement, low growth group of schools in the bottom left quadrant. These schools make up 36 percent of independent charter schools. The students in these schools are behind academically and will likely remain there without intervention.

Figure 49: Growth and Achievement for Independent Charter Schools, Math



In reading, 57 percent of independent charter schools have positive growth, all the green circles in Figure 50. A full 31 percent of the independent charter schools are in the light green quadrant which means they are high achieving as well as high growth. Twenty-seven percent of independent charter schools are in the bottom left, red quadrant. These are the schools which have low achievement and low growth. These schools are unlikely to move their students upward out of low achieving status.

Figure 50: Growth and Achievement for Independent Charter Schools, Reading



Figure 51 shows the percent of CMO charter schools which fall into each cell. The top right quadrant which represents schools with both high growth and high achievement contains 31 percent of the schools. This is the ideal quadrant where we would like to see all schools. The bottom right quadrant, in dark purple, includes the schools which have low achievement but strong growth. Given enough time and a continuing trend, the 24 percent of schools in the dark purple quadrant will eventually become high achieving as well. Nine percent of schools are high achieving with low growth. The bottom left quadrant contains the schools of greatest concern. These are the schools which are both low achieving and low growing. Thirty-five percent of CMO charter schools fall into the low achievement, low growth quadrant. These are schools which need to make major improvements in student outcomes or face closure by their authorizer.

Figure 51: Growth and Achievement for CMO Charter Schools, Math

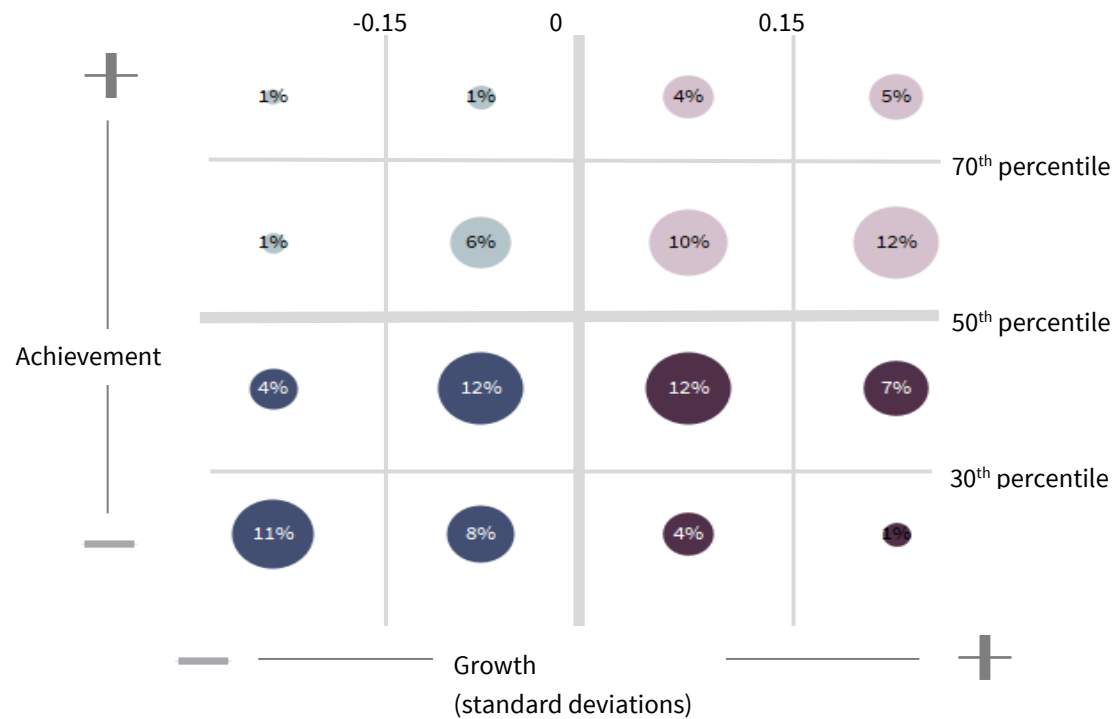
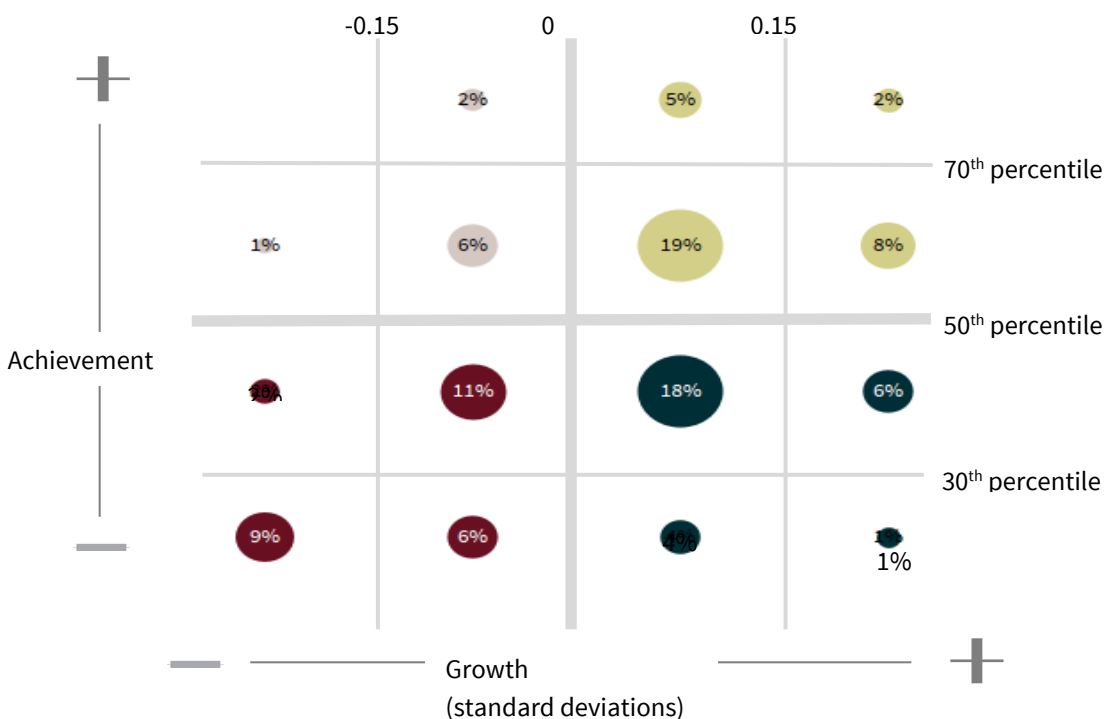


Figure 52 has the same information for CMO charter schools in reading. Thirty-four percent of CMO charter schools are both high achieving and high growing in reading. An additional 29 percent of CMO charter schools have low achievement but are high growing. As with math, the bottom left quadrant in dark red is the area of greatest concern as these schools are both low achieving and low growing. In reading, 28 percent of schools fall into this category of special scrutiny.

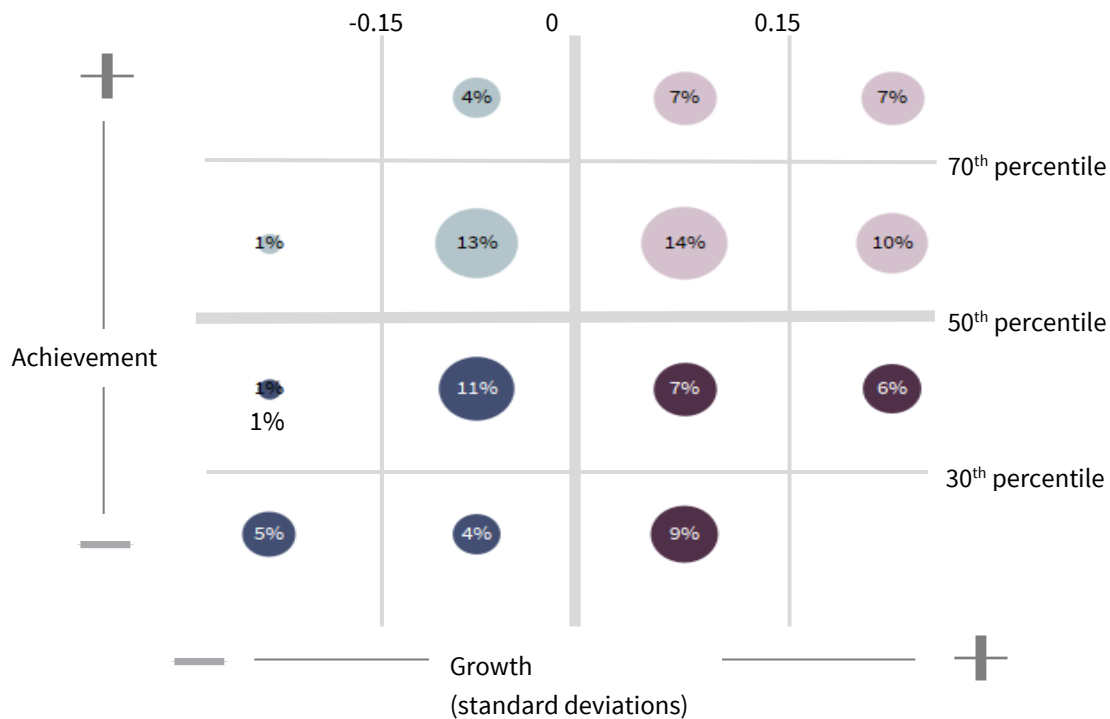
Figure 52: Growth and Achievement for CMO Charter Schools, Reading



The growth and achievement distributions for VOS charter schools are similar to those for independent charter schools. In math, 26 percent of VOS charter schools are in the high growth, high achievement (upper right) quadrant. The lowest performing quadrant in the bottom left has 33 percent of the VOS charter schools for math. Results for VOS charters in reading also closely mirror those for independent charters. Thirty-one percent of VOS charter schools are in the top right, high-performing quadrant in reading and 27 percent are in the bottom left, low-performing quadrant.

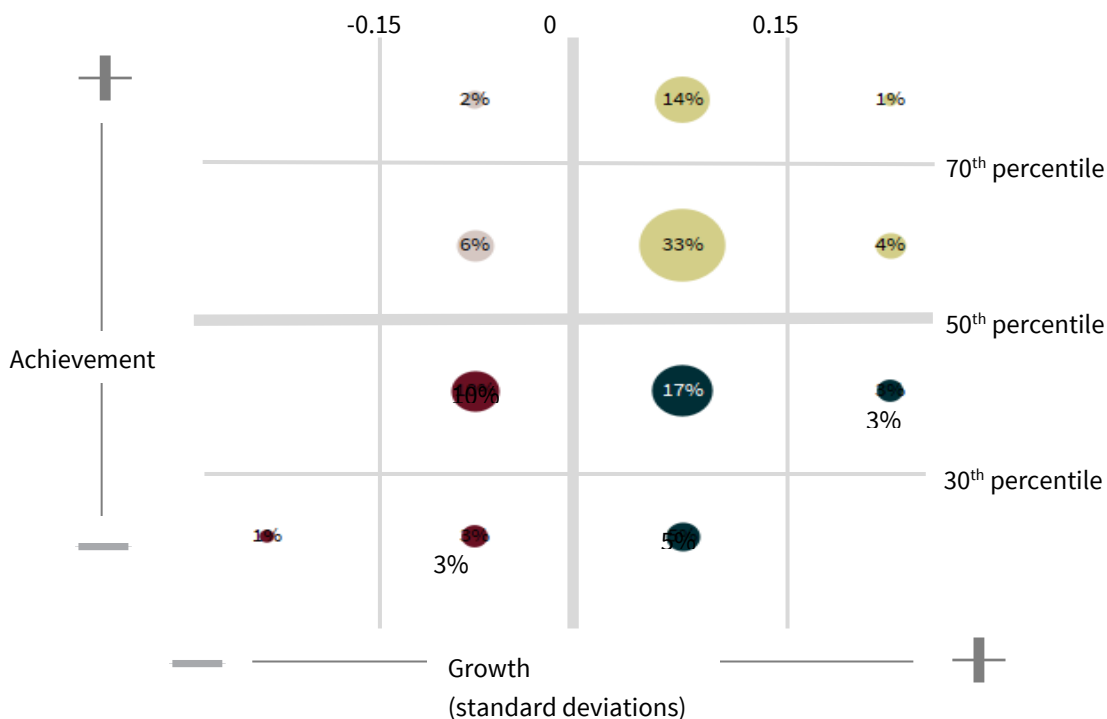
While results for CMO schools and VOS schools are similar, the results for schools which are part of both a CMO and a VOS are much different. The Hybrid sector has more schools in the top right quadrant. This is especially true in reading. For math (see Figure 53), 38 percent of Hybrid charter schools have both high growth and high achievement. Forty-three percent of Hybrid charters have achievement which is below average. However, only 21 percent of Hybrid charter schools fall into the bottom left quadrant in math. These are the schools which are both low achieving and have low growth. The remaining schools with low achievement, 22 percent, have high growth and with time can be expected to move their students to above-average achievement.

Figure 53: Growth and Achievement for Hybrid Charter Schools, Math



The results for Hybrid charter schools are strongest in reading. The majority of Hybrid charter schools, 52 percent, are in the high growth, high achievement quadrant. Further, an additional 25 percent of Hybrid charter schools are in the high growth, low achievement quadrant, dark green in Figure 54. Only 14 percent of Hybrid charter schools are in the low growth, low achievement quadrant which is of greatest concern.

Figure 54: Growth and Achievement for Hybrid Charter Schools, Reading



Network Affiliation

To this point, we have discussed charter schools in categorical context. We have grouped charters by the type of management organization – CMO, VOS, Hybrid, or independent – to which they belong. These categories contain students from 294 different networks. Using a statistical model, we are able to compute an effect size for each charter network. Because these models rely on statistical principles, we do not list results for the five networks with fewer than 30 students in the data set. An estimate based on so few students would be unreliable.

While it might seem logical that all charter school networks would have on average strong growth effect sizes, the truth is many networks have extremely negative effect sizes. The distribution of average effect sizes over the range of charter school networks includes a disturbingly low left tail in both math and reading. The most common effect size is 0.05, but many networks are well below that mark. A preferred outcome would be for all or at least a majority of charter networks to have average effect sizes above 0.00. Figures 55 and 56 give the distribution of network effect sizes in math and reading, respectively. Individual network effect sizes are listed in Appendix A of this report. A question for further research includes the process and policies behind the charter networks with low average growth. It would be informative to know if these were strong performing schools which expanded poorly or if the original schools in these networks were low performing all along.

Figure 55: Distribution of Network Average Effect Sizes, Math

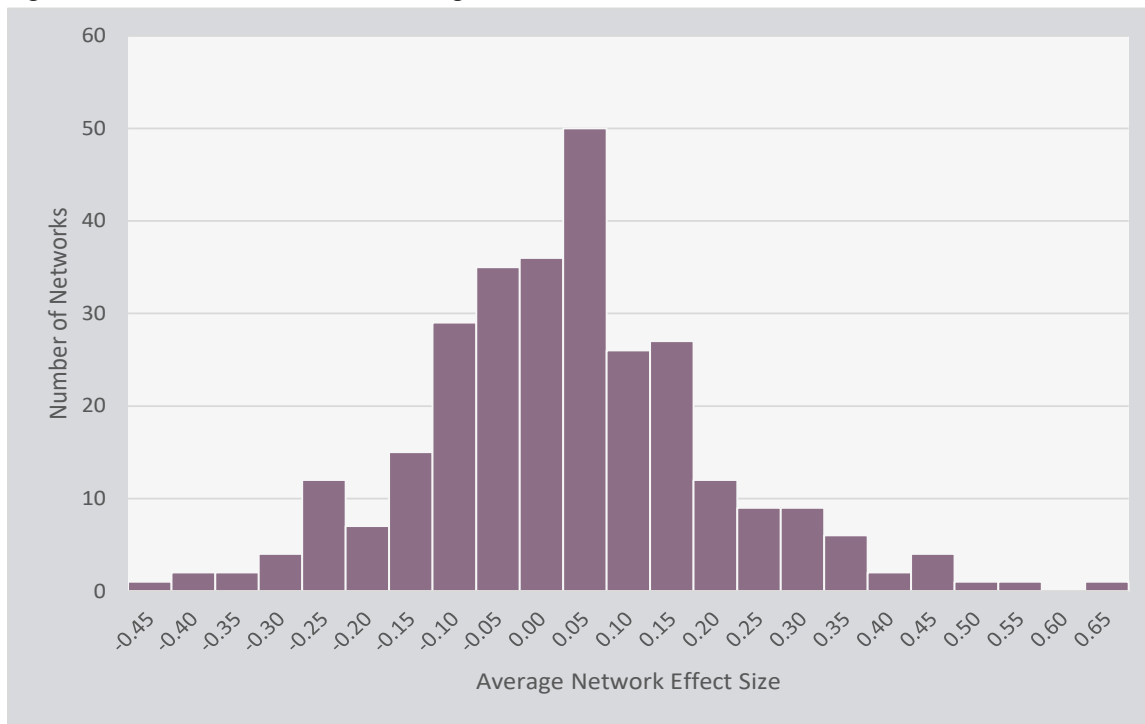
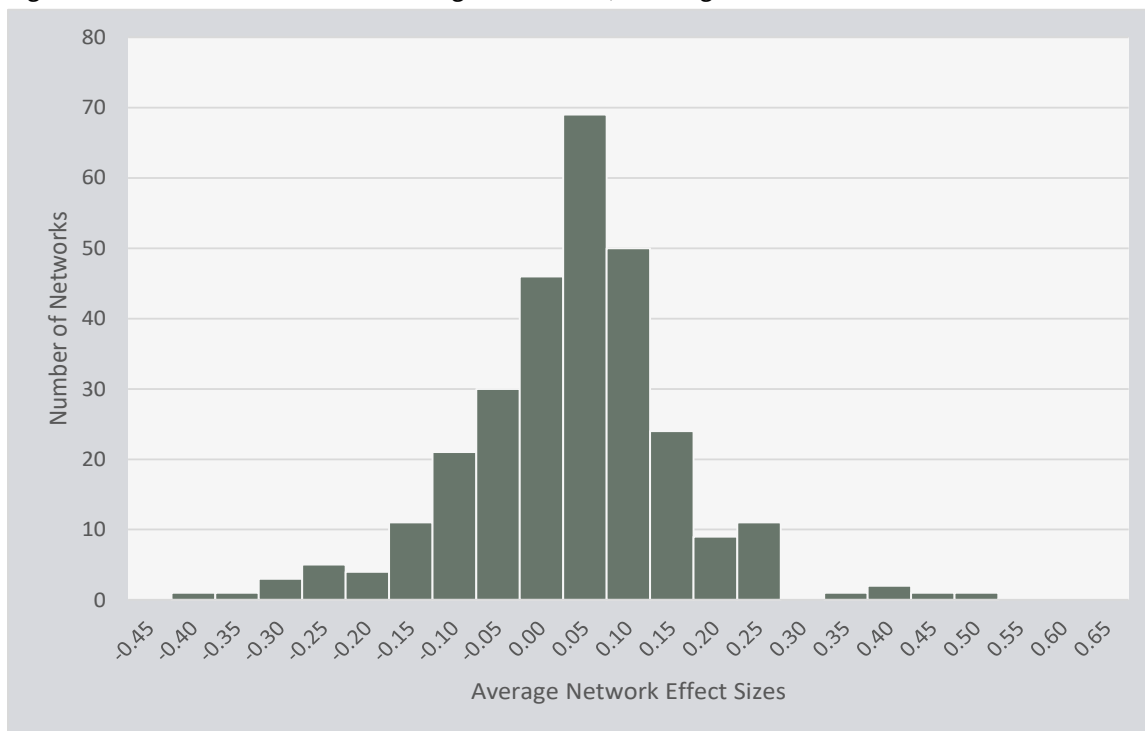


Figure 56: Distribution of Network Average Effect Sizes, Reading



Super Networks

In the 2013 Charter School Growth and Replication report, CREDO introduced the concept of super networks. A super network is a network of charter networks. There are two primary models of super networks.

The first consists of national organizations which oversee multiple regional networks which themselves function semiautonomously. An example of this type of super network would be an organization such as the KIPP Foundation. KIPP schools are overseen at the regional level by a local organization such as KIPP Houston or KIPP Chicago. These regional networks receive support from a central national organization which provides a level of leadership and mission to the entire super network. Thus, schools in a super network maintain a shared vision and practices while allowing for customization to the needs and problems of the local region.

The second type of super network places multiple brands of charter schools under a single larger organization. Under this model, each brand of charter schools may have a different mission or different practices, but all the brands are overseen by a second-level organization in a hierarchical structure.

Regardless of which organizational model is used by a super network, the common factor is that schools in a super network have a multitiered organizational structure. The schools are part of a first-level organization which itself then is part of a second-level organization.

For this report, CREDO identified eight organizations with structures we feel align with the concept of a super network. These organizations are Aspira Association, Big Picture Learning, K12, KIPP, Learning Matters Education Group, ResponsiveED, Uncommon Schools and White Hat Management. Some of these organizations operate only physical schools, some operate online education programs, and others have a combination of physical and online schools. The Learning Matters Education Group and White Hat Management are classified as VOSSs. The rest of the super networks include CMO charter schools.

Table 10: Super Network Effect Sizes, Math and Reading

SUPER NETWORK NAME	MATH	READING
Aspira Association	0.04*	0.01
Big Picture Learning	-0.35**	-0.14**
K12	-0.21**	-0.11**
KIPP	0.10**	0.08**
Learning Matters Education Group	-0.08*	0.00
ResponsiveEd	-0.21**	-0.04
Uncommon Schools	0.24**	0.15**
White Hat Management	-0.02	-0.05**
** Significant at the 0.01 level. *Significant at the 0.05 level.		

Table 10 includes the average math and reading effect sizes for each of the super networks. The values range from a low of -0.35 or 200 fewer days of learning to 0.24 or 137 days of additional learning. These results show wide variation in results for charter school super networks. While the basic super network results are informative, these results must be interpreted with the understanding that the single values in Table 10 are representative of the super network as a whole. Individual component networks may have differing effects. For example, a positive super network effect does not mean every regional or brand network within the super network has the same outcome. The network listings in Appendix A include an indicator for networks which comprise part of a super network.¹⁷

Network Virtual Charter Schools

In 2015, CREDO – in conjunction with Mathematica Policy Research and the Center on Reinventing Public Education – released a set of reports on virtual charter schools. The findings from the Online Charter School Study showed extremely negative results for students attending full-time online charter schools (Woodworth et al. 2015). The effect size in reading was -0.10 and for math -0.25.

One of the questions included in this study was whether full-time online charter schools which were part of a network would have different outcomes than those found in the Online Charter School Study. To this end, we include a statistical model which estimates the effect sizes for four groups of charter schools,

¹⁷ For Big Picture Learning and K12, the individual regional networks could not be identified at the school level. Therefore, the effect size for the network in Appendix A is the same as the super network effect size.

brick-and-mortar charter schools, non-network online charter schools, online schools which are part of a CMO, and online schools which are part of a VOS. There were no Hybrid online charter schools.

Figure 57 shows that the results for online charter schools are significantly negative and large regardless of network affiliation. While the effect size for VOS online charter schools was significantly different from the effect size for CMO online charter schools in math, both values are so low the fact that they are significantly different from each other is simply differentiation between two levels of failure.

Figure 58 displays the results for online charter schools by sector in reading. While the reading numbers are less abysmal than those in math, they still show consistent and persistent negative effect sizes for online charter schools. It is worth noting that some of the networks included in this study consist primarily or exclusively of online charter schools. In other instances, the effect sizes of the network or even super network have been negatively affected by the results of a single, large online charter school which is part of the network. However, these online schools are part of the networks' operations by choice. Therefore, it is appropriate to include them as part of the networks' overall results.

Figure 57: Online Charter School Effect Sizes by Sector, Math

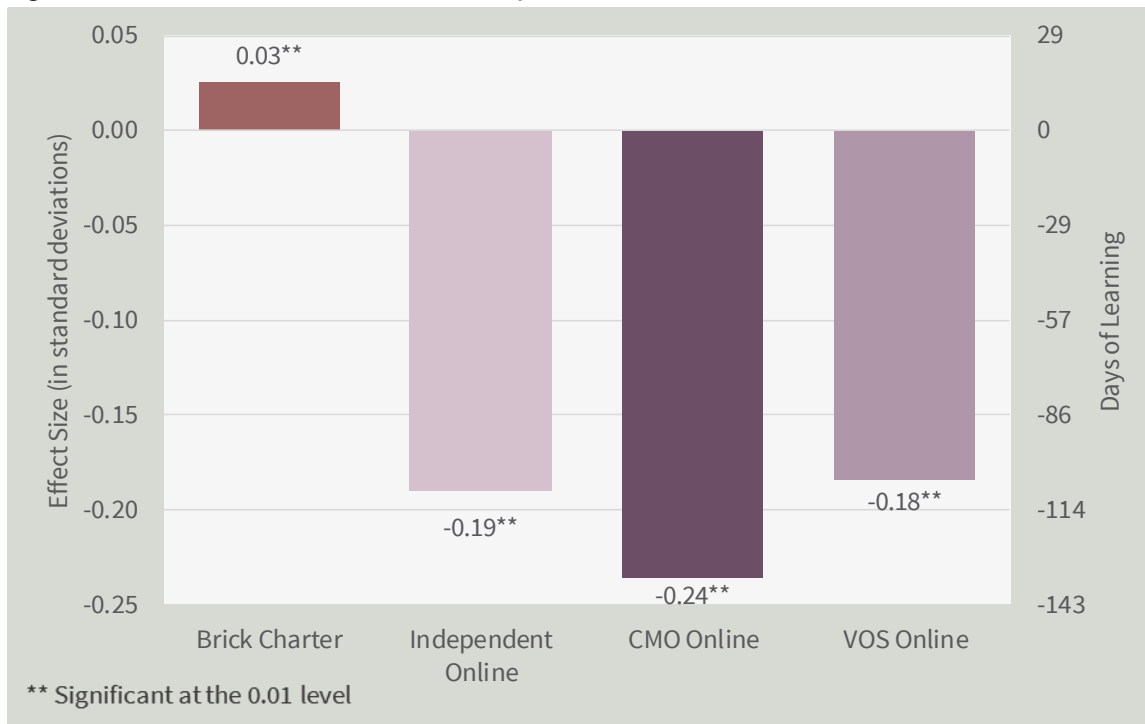
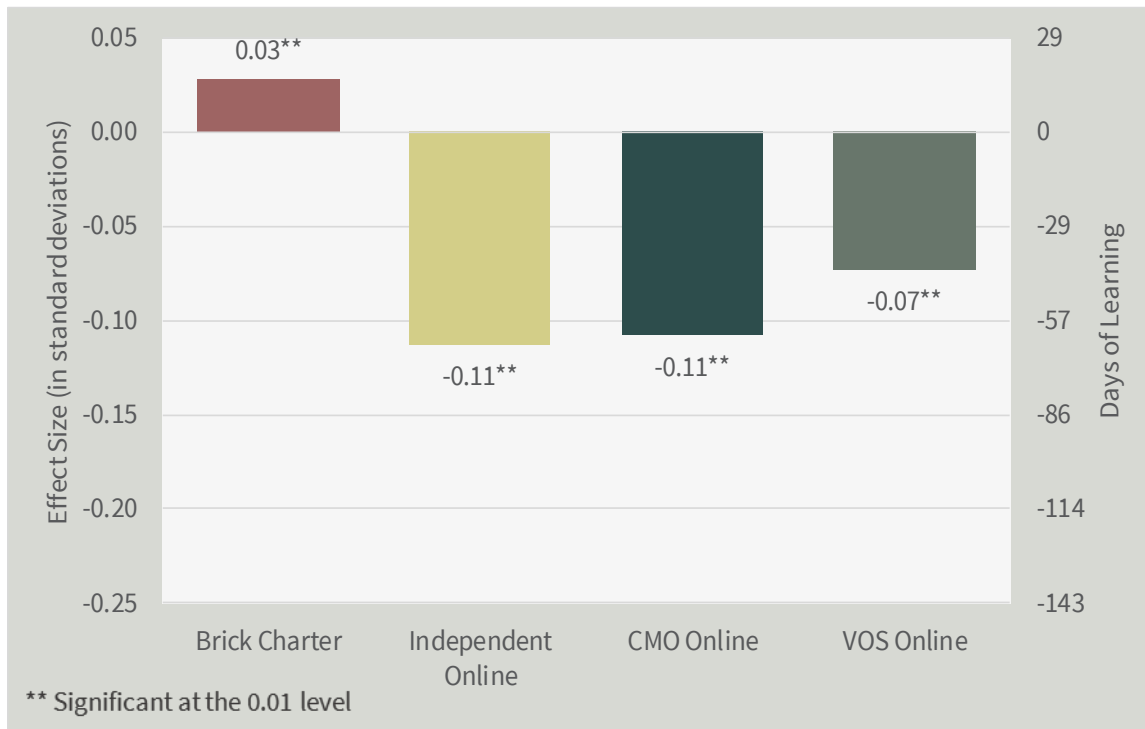


Figure 58: Charter School Effect Sizes by Sector, Reading

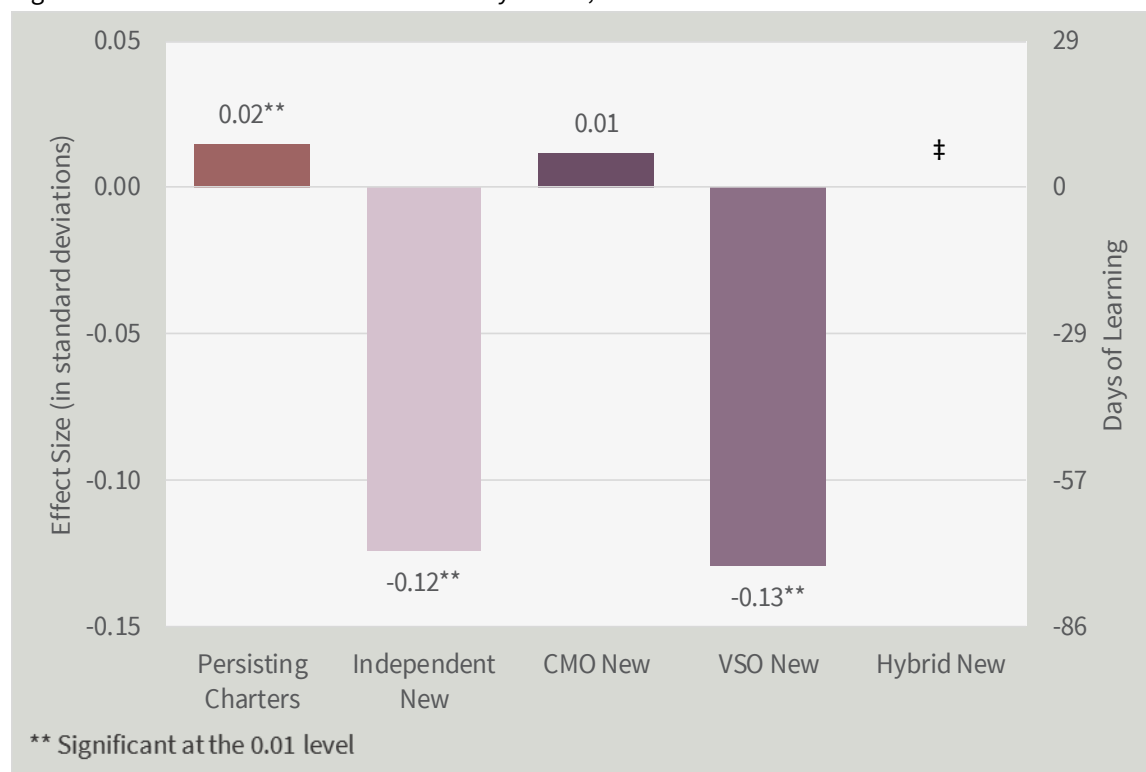


New Schools and Networks

One of the advantages of belonging to a charter network is the existence of institutional knowledge into which new schools can tap. If such knowledge exists, then newly opened schools which are part of a network should fare better than new independent charter schools. Part of the extensive school-level database maintained by CREDO includes information on what year a school opened. In order to identify a network effect on new schools, we include a model which differentiates among persisting charter schools (those which existed in the previous year), new charter schools in a network and those new schools not in a network.

The results in Figure 59 show the persisting charter schools have an effect size of 0.02 in math. Students attending first-year charter schools have significantly weaker growth than their TPS comparisons. Students in a new VOS school have a math effect size which is similar to that of new independent charter schools. This suggests VOS schools do not benefit from network institutional knowledge. CMO new schools, on the other hand, have growth which is not significantly different from their VCRs or from the growth of students attending persisting charter schools. The Hybrid sector does not have enough students in new schools to produce a reliable estimate.

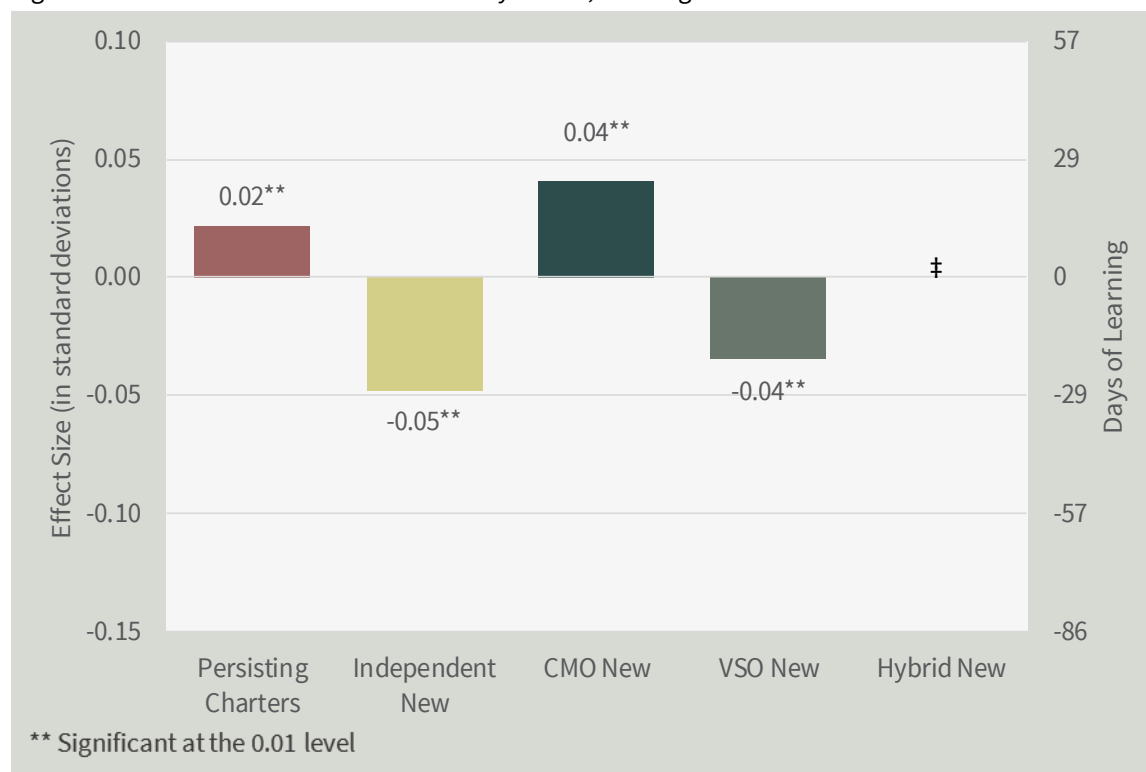
Figure 59: New Charter School Effect Sizes by Sector, Math



‡ Too few students for reliable estimate

The pattern of growth is similar in reading. Persisting charter students have a 0.02 effect size in reading. The non-network and VOS charter students attending new schools have growth which is significantly weaker than that of the persisting charters as well as that of their VCRs. In reading, the students attending a new CMO charter school actually have growth which is stronger than the persisting charter schools. New Hybrid charter schools do not have enough students to produce a reliable estimate.

Figure 60: New Charter School Effect Sizes by Sector, Reading



‡ Too few students for reliable estimate

The results for students attending new charter schools show a relationship between growth and the sector of the new school. The difference in effect size between new non-network charter schools and new CMO charter schools suggests CMO networks pass on some institutional knowledge to their new schools which enable those schools to mitigate the negative impacts of operating a new school.

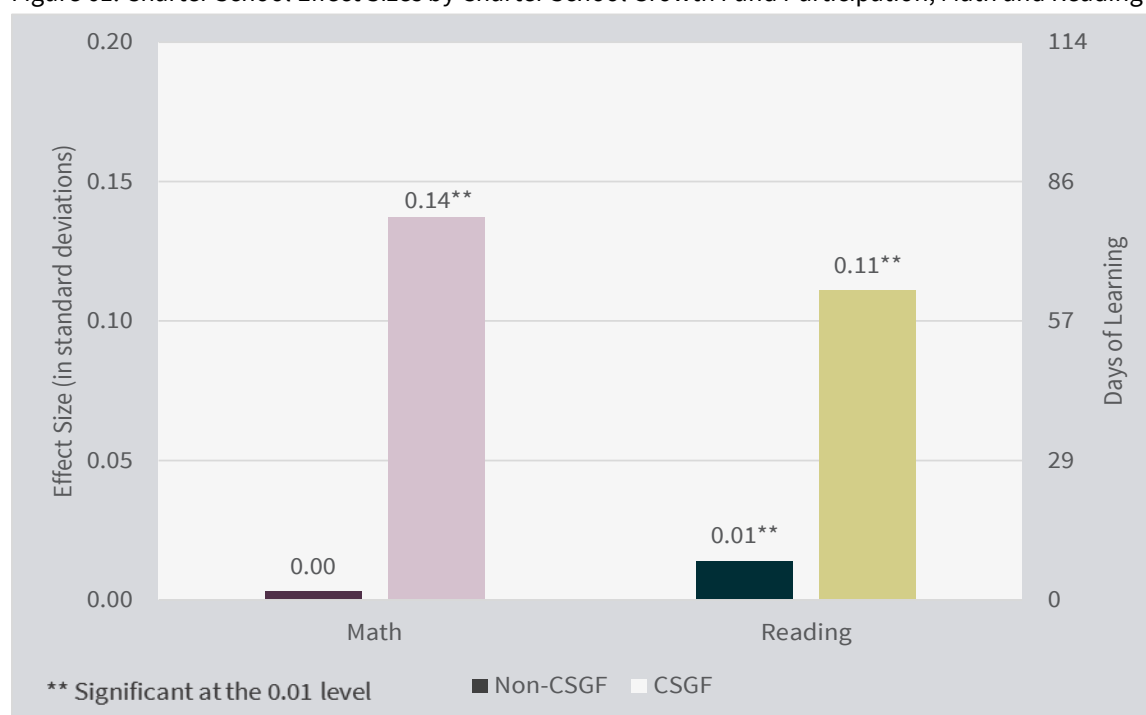
Charter School Growth Fund Schools

In the 2013 CGAR study, CREDO examined the effect size of charter school networks which were funded in part by the Charter School Growth Fund (CSGF). Charter School Growth Fund is a national nonprofit which makes multi-year investments in charter schools to help them grow into multi-school networks. In the 2013 study, Charter School Growth Fund schools had stronger growth than other charter schools. This showed Charter School Growth Fund seemed to have the ability to predict which successful charter operators were likely to remain successful as they increased the scale of their operations.

For this study, we wanted to see if Charter School Growth Fund has continued its prognostic success by helping to grow charter school networks that operate effective schools. Because CREDO defines a charter school network as an organization having at least three schools, some of Charter School Growth Fund's more recent selectees are not included as Charter School Growth Fund for this analysis. However, as one of the goals of Charter School Growth Fund is to support charter operators in opening more schools, the networks which did not meet our three-school cutoff are newer additions to the Charter School Growth Fund portfolio. This means those schools have not yet received a typical Charter School Growth Fund investment for the purposes of scaling up operations; thus, they should be excluded anyway.

In Figure 61, non-Charter School Growth Fund charter schools are represented by the dark shaded bars, and charter schools funded by Charter School Growth Fund are represented by the light shaded bars. In both math and reading, the effect size for Charter School Growth Fund schools greatly exceeds that of the non-Charter School Growth Fund charter schools when both are compared to the VCRs baseline of 0.00. The difference between the two groups is equivalent to 80 additional days learning for Charter School Growth Fund school students in math and 57 additional days in reading.

Figure 61: Charter School Effect Sizes by Charter School Growth Fund Participation, Math and Reading



Although the difference between non-Charter School Growth Fund charter and Charter School Growth Fund schools is smaller than in the 2013 CGAR study, the continued strong effect size of Charter School Growth Fund schools suggests that Charter School Growth Fund has developed a screening process to identify operating charter schools that are more likely to operate successful schools as they grow. To go

a step further than the previous study and ensure the results were not the result of success with just a subset of the population, we evaluate the Charter School Growth Fund results on a variety of breakouts. Results for these breakouts, which show consistent positive effects across multiple subgroups, are included in the data appendix of this report.

Summary and Implications

As we state in the opening section, the primary question of this analysis is, “Do schools which are part of a larger management structure create student academic growth that is different from that seen in independent charter schools?” Based on the information presented in this report, the simple answer seems to be, “Students attending a charter school which is part of a network have stronger growth than they would in TPS or an independent charter school.” Of course, this is a simple answer to a complex question. Results are not monolithic, nor are charter schools. Thus, nuances of each situation matter.

Having replicated is not a guarantee of quality.

The analysis of charter network average effect sizes is disturbing. There are a significant number of charter schools which have been allowed to replicate into a multi-campus network even though their average impact on academic growth is extremely low. This was a finding of the 2013 CGAR study as well, and this study supports continued concern. While some of these charter schools may argue they provide additional services to their students which make up for lower academic gains, it is incumbent on authorizers to investigate these claims and evaluate the charter schools to determine if the additional benefits, in fact, balance the weak academic results.

Charter quality varies by network.

Network-level analyses show charter performances across the country differ greatly. This indicates there are characteristics of the charter school operations or the public school environment which change across locations. At least some of these differences should be identifiable. One of the early theories behind charter schools is that they would be a laboratory/incubator for new educational ideas which could then be shared with other schools. This spirit should still hold true today. Some networks have highly effective charter schools in multiple locations. These should be examined and studied for practices which can be adopted by other schools.

Management arrangements matter.

There are three insights from this analysis that pertain to management practices. First, at the average, independent charter schools show lower gains for their students than CMOs. Despite the wide range of CMO quality, larger organizations of charter holders have taken advantage of scale to the benefit of their students. Second, in larger organizations, maintaining direct operating control produces better results than relying on contract VOS operators. The third point is actually an exception to the second but, due to the small number of cases in the Hybrid group, requires caution. When CMOs take either a portfolio approach to their school operations or develop deep and enduring relationships with VOSs, it appears that both sides of the exchange bring out the best in each other and the results are, on average, superior to other arrangements. Further exploration is needed to better understand the mechanisms that lead to such strong results.

Authorizers have more work to do.

The two items above lead to a frank conclusion. Some charter authorizers are not holding their schools adequately accountable. Why are charter schools with weak academic track records allowed to replicate? Why are some networks with terrible average growth allowed to continue to operate multiple schools? Charter school authorizers are charged with acting as the gatekeepers to ensure schools of choice are beneficial to their students. Some of them seem to be abdicating that responsibility. If authorizers will not step up to their responsibilities to regulate charter performance, then legislatures need to acknowledge their responsibilities to regulate authorizers.

Charter quality varies by state.

Just as we find variation by charter network, we also find variation by state. State policies and practices have a strong bearing on school operations. States with lower performing schools should take a moment to look at the practices of neighboring states where kids have stronger growth. While every state is different, some policies can be adapted across state borders.

Overall, charter schools are having a positive academic impact.

In every sector of charter schools, a higher percentage of charter schools have better growth compared to their VCRs than have worse growth compared to their VCRs. This holds true in both math and reading. Strong authorizing policies can increase this percentage by holding charter schools to their end of the charter bargain of accountability in exchange for flexibility.

Charters have more success with middle schools and high schools.

Results presented in this study support the assertion that networked charter schools have their strongest effect on students in the middle school and high school settings. Equally important is the finding that multilevel charter schools seem to struggle greatly with providing better outcomes for students than the students would otherwise achieve in TPS.

Virtual charter schools don't work for most kids.

As far back as the 2011 "Charter School Performance in Pennsylvania" report, CREDO has found that virtual charter schools are not effective for the average student attending full-time virtual schools (Center for Research on Education Outcomes 2011). This finding was confirmed on a large scale in the 2015 "Online Charter School Study" (Woodworth et al. 2015) and again in this report. This report shares only one growth period with the 2015 "Online Charter School Study" and adds two more years of data, but finds almost identical results. It is time for operators, authorizers and legislatures to step up to their responsibilities to ensure virtual schools, both traditional and charter, are only used when they are the best option for students.

It is not an exaggeration to say that good schools can make all the difference in a child's future. Charter school networks can provide a structure and means for identifying and propagating high quality educational opportunities for students. But they also can be the means by which poor quality programs expand and survive. The responsibility to ensure only the best schools operate and multiply rests at every level of accountability. As this study shows, there is still much work to be done in regulating and maintaining the pool of charter school networks. But overall, charter school networks have a beneficial influence on the provision of education services in the United States.

Appendix A: INDIVIDUAL NETWORK EFFECT SIZES IN MATH AND READING

NETWORK NAME	N	SECTOR	MATH	READING
Academica	23,788	VOS	-0.02	0.04*
Academy of Tucson	733	CMO	-0.04	0.02
Accelerated Learning Solutions	402	VOS	0.00	-0.15**
Accelerated School, The	766	CMO	0.06	0.05**
ACH Corporation of America	292	VOS	0.00	-0.05
Achievement First	5,262	CMO	0.22**	0.10**
AdvancED	426	VOS	0.12*	0.02
Albert Einstein Academies	373	CMO	-0.15**	0.04**
Algiers Charter School Association	5,678	CMO	0.11**	0.00
Alliance for College-Ready Public Schools	5,185	CMO	0.12**	0.09**
Altus Institute Network of Charter Schools	1,459	CMO	-0.16**	-0.14**
America CAN!	3,468	CMO	-0.06	-0.15**
American Indian Public Charter School	636	CMO	0.43**	0.22**
American Leadership Academy, Inc.	3,988	CMO	0.00	-0.07**
American Quality Schools	607	CMO	‡	‡
AmeriSchools (Ideabanc, Inc.) (The Charter Foundation, Inc.)	758	CMO	0.02	0.04*
Amethod Public Schools	271	CMO	0.53**	0.39**
AppleTree Institute for Education Innovations	160	CMO	-0.22**	-0.19**
Archimedean Academy	1,084	CMO	0.20**	0.21**
Arizona Agribusiness & Equine Center	1,220	CMO	0.23**	0.07**
Arizona Community Development Corporation	2,112	CMO	0.00	-0.01
Arrow Academy, Inc.	540	CMO	-0.15*	0.00
Ascend Learning	1,668	CMO	-0.01	0.02
Aspira Inc. of Florida ^A	3,696	CMO	-0.08	-0.07
Aspira Inc. of Illinois ^A	1,582	CMO	0.02*	0.02**
Aspira Inc. of Pennsylvania ^A	3,494	CMO	0.04	0.01
Aspire Public Schools	5,695	CMO	0.05	0.01
Association for Development of Academic Excellence	626	CMO	-0.03	-0.09
BASIS Schools, Inc.	12,010	CMO	0.18**	0.17**
Bay Area Charter School, Inc.	280	CMO	-0.13**	-0.07
Ben Gamla Charter School Foundation	1,458	Hybrid	0.13*	0.06
Benjamin Franklin Charter Schools	2,391	CMO	0.16**	0.06*
Betty Shabazz International Charter School	787	CMO	0.08	-0.01
Big Picture Learning Network ^B	268	CMO	-0.35**	-0.16**
Blackstone Valley Prep Mayoral Academy	542	CMO	0.19**	0.17**

NETWORK NAME	N	SECTOR	MATH	READING
Blueprint Education	299	CMO	-0.08**	-0.09*
Brazos School for Inquiry & Creativity (BSIC) - Democratic Schools Research, Inc.	372	CMO	0.11	0.07**
Breakthrough Schools	1,600	CMO	0.26**	0.21**
Bright Star Schools	768	CMO	-0.05*	-0.02
Brighter Choice Charter Schools	932	CMO	0.03	0.02
Brooke Charter Schools	574	CMO	0.60**	0.47**
Broward Community Schools	440	CMO	-0.21*	-0.02
California Montessori Project	654	CMO	-0.09*	0.02
California Pacific Charter Schools	271	CMO	-0.29**	-0.16**
Calvin Nelms Charter Schools	383	CMO	-0.12	-0.01
Camino Nuevo	904	CMO	0.08	0.09**
Capital City Public Charter School	775	CMO	-0.07*	0.03*
Career Success School District	749	CMO	-0.10**	-0.04
Carl C. Icahn Charter Schools	658	CMO	0.30**	0.08*
Celerity Educational Group	960	CMO	0.25**	0.12**
Center City Public Charter Schools	1,454	CMO	0.06	0.06
Center for Academic Success	858	CMO	-0.11*	-0.02
Cesar Chavez Academy	2,458	CMO	-0.08**	-0.09**
Cesar Chavez Academy District	1,086	VOS	0.01	0.02**
Cesar Chavez PCS for Public Policy	1,359	CMO	0.00	-0.05
Chandler Park Academy	1,763	CMO	-0.04**	0.04**
Charter School Administration Services	337	VOS	-0.15**	-0.08
Charter School Associates	7,063	VOS	-0.13**	-0.01
Charter Schools USA	48,407	VOS	-0.02	0.01
Chicago International Charter Schools	9,921	Hybrid	-0.11*	-0.07*
Choice Foundation	2,066	CMO	0.00	0.05
Choice Schools Associates	1,182	VOS	-0.02	0.02
Civitas Schools	690	Hybrid	0.14**	0.10**
Collegiate Academies	426	CMO	0.41**	0.01
Community Academy PCS	391	CMO	0.01	0.05*
Community Options for Resources in Education	505	CMO	-0.12**	-0.05*
Concept Schools	6,384	VOS	0.04	-0.01
Confluence Academies	1,939	CMO	-0.03	-0.03
Connections Academy, Inc.	24,045	VOS	-0.19**	-0.07*
Constellation Schools	2,872	CMO	0.02	0.01
Cornerstone Charter Schools	1,245	CMO	-0.07*	0.02

NETWORK NAME	N	SECTOR	MATH	READING
Crescent City	454	CMO	0.04	‡
CS Partners, LLC	3,995	VOS	-0.02	0.02
Daisy Education Corporation (DEC) (Sonoran Science Academy)	2,001	CMO	0.06	0.05
DC Prep Charter Schools	668	CMO	0.43**	0.23**
Democracy Prep Public Schools	5,421	CMO	0.17**	0.08*
Denver School of Science and Technology Public Schools	5,499	CMO	0.30**	0.22**
Doral Academy	5,373	Hybrid	0.25**	0.10**
e_Institute ^E	569	Hybrid	0.04	-0.11
Ed Futures, Inc.	706	VOS	-0.05	0.04
Ed Tech Schools	5	VOS	‡	‡
Edge School Inc., The	179	CMO	0.25**	-0.03
Edison Learning	10,417	VOS	0.01	0.04*
EdKey Schools	1,633	CMO	-0.17**	-0.11**
Education for Change	793	CMO	0.06	-0.01
Education Management and Networks	366	VOS	-0.07	0.07*
EdVantages Academies	2,481	VOS	-0.03	-0.01
El Paso Education Initiative, Inc.	1,222	CMO	0.14**	0.07**
Environmental Charter Schools	550	CMO	-0.13**	0.01
Envision Schools	582	CMO	-0.09*	0.00
eSchool Consultants	8	VOS	‡	‡
Espiritu Community Development Corp.	512	CMO	0.27*	0.13**
eStem Public Charter Schools	1,382	CMO	0.00	0.02
Evans Solution Management Company	159	VOS	-0.06	-0.14**
Evolution Academy	247	CMO	-0.11**	-0.38**
Excel Academy (TX)	705	CMO	-0.43**	-0.41**
Explore Schools, Inc.	1,543	CMO	-0.01	-0.06**
Faith Family Academy Charters	2,743	CMO	-0.09**	-0.11**
Fenton Charter Public Schools	998	CMO	0.21*	0.06
Firstline Schools	3,004	CMO	0.05	0.06*
Foundation for Behavioral Resources	304	CMO	0.02	0.04
Founders Classical Academy ^F	964	CMO	-0.05	0.08*
Friendship Schools	3,207	VOS	0.13*	0.03
Gateway Community Charters	1,254	CMO	-0.01	-0.03
Gestalt Community Schools	1,678	CMO	-0.08	0.02
Global Educational Excellence	1,980	VOS	-0.02	0.01
Golden Rule Charter School	774	CMO	0.07**	-0.01*

NETWORK NAME	N	SECTOR	MATH	READING
Golden Valley Charter Schools, Inc.	507	CMO	0.02	0.12**
Great Hearts Academies	9,878	VOS	0.09**	0.10**
Green Apple School Management, LLC	1,005	CMO	0.06**	0.06**
Green Dot Public Schools	5,499	CMO	0.05	0.02
Gulf Coast Council of La Raza	140	CMO	-0.28**	-0.18**
Hamadeh Educational Services	2,043	VOS	0.07*	0.15**
Hanely Harper Group	35	VOS	0.06**	0.13**
Harmony Schools (Cosmos Foundation, Inc.)	34,203	CMO	0.13**	0.07**
Harvest Power Community Development	679	CMO	-0.03	-0.03
Helicon Associates	1,846	VOS	0.05	0.05**
Heritage Academy (AZ)	300	CMO	-0.20**	-0.21**
Hickman Community Charter District	520	CMO	0.07**	0.07*
High Tech High	2,409	CMO	-0.16*	0.00
Honors Academy	739	CMO	0.02	-0.06
Hope Academies ^H	2,157	CMO	-0.11**	-0.11*
Houston Gateway Academy	1,731	CMO	0.44**	0.14**
Howard Road PCS	86	VOS	-0.01	0.04**
Humanities and Sciences Academy of the United States, Inc.	421	CMO	-0.18**	-0.13**
IDEA Public Schools	17,020	CMO	0.14**	0.13**
Imagine Schools	29,812	CMO	-0.03	-0.02
Information Referral Resource Assistance, Inc. (IRRA) (One Stop Multiservice Charter School)	409	CMO	-0.13**	-0.28**
Inner City Education Foundation (ICEF)	2,157	CMO	0.03	0.00
Innovative Education Management	3,905	VOS	-0.13**	0.04
Innovative Teaching Solutions	1,003	CMO	-0.03	0.00
Insight Schools, Inc.	282	VOS	-0.08	0.12
Intelli-School Charter High Schools	311	CMO	-0.06*	-0.03
International Leadership Of Texas (ILT)	2,958	CMO	0.01	0.01
iSchool High ^F	252	CMO	-0.10**	0.04
John H. Wood Jr. Public Charter District	633	CMO	-0.25**	-0.24**
Jubilee Academic Center, Inc.	2,653	CMO	-0.10	-0.01
K12 curriculum only	1115	CMO	-0.16	-0.05
K12, Inc. ^C	44,559	CMO	-0.22**	-0.11**
King/Chavez	1,131	CMO	-0.08	-0.05*
Kingman Academy of Learning	1,439	CMO	0.02	0.01
KIPP Austin ^D	3,292	CMO	0.15**	0.07**

NETWORK NAME	N	SECTOR	MATH	READING
KIPP Bay Area ^D	1,356	CMO	0.25*	0.20**
KIPP Chicago ^D	1,576	CMO	-0.07	-0.03
KIPP Colorado ^D	2,199	CMO	0.23**	0.24**
KIPP DC ^D	2,739	CMO	0.29**	0.13**
KIPP Delta ^D	1,577	CMO	0.21**	0.06
KIPP Houston ^D	9,054	CMO	0.03	0.07**
KIPP LA ^D	915	CMO	0.22**	0.16*
KIPP Memphis ^D	1,888	CMO	-0.12	-0.03
KIPP National ^D	8,789	CMO	0.11**	0.07*
KIPP New Jersey ^D	2,394	CMO	0.02	0.07**
KIPP_New Orleans	3,964	CMO	0.05	0.05
KIPP New York City ^D	5,004	CMO	0.18**	0.10**
KIPP Philadelphia ^D	2,160	CMO	0.15*	0.11*
KIPP San Antonio ^D	2,395	CMO	0.01	0.06*
La Amistad Love & Learning Academy	20	CMO	‡	‡
Leadership Public Schools	523	CMO	0.31	0.13
Leading Edge Academy	912	CMO	0.04	-0.02
Learn Charter School	2,585	CMO	0.08	0.04
Learning Foundation and Performing Arts (CAFA, Inc.)	686	CMO	-0.04	0.05
Learning Matters Educational Group (LMEG)	924	VOS	-0.09**	0.04**
Legacy Traditional School	6,441	CMO	0.04	0.07**
Leona Group, LLC	13,264	VOS	-0.06**	-0.05**
Life Schools	5,384	CMO	0.02	0.04**
Life Skills Centers ^H	379	CMO	-0.26**	-0.31**
Lighthouse Academies	2,387	CMO	0.04*	0.05
Lincoln-Marti management services, LLC	522	CMO	-0.10	0.08
Lisa Academies	1,132	CMO	0.02	0.01
Magnolia Science Academy (Magnolia Foundation)	2,315	CMO	-0.03	-0.02
Mastery Charter Schools	8,433	CMO	0.03	0.10**
Mastery Learning Institute (Arthur Academy)	821	CMO	0.13**	0.15**
Mater Academy, Inc.	12,358	Hybrid	0.17**	0.07**
Mavericks in Education, LLC	622	CMO	-0.28**	-0.27**
McKeel Academies	3,887	CMO	0.04**	-0.03*
Midwest Management Group	2,012	VOS	-0.06	0.01
Minnesota Transition Schools (MTS)	571	CMO	-0.08	-0.05
Mosaica	5,707	VOS	-0.02	0.05*
National Heritage Academies	26,782	VOS	0.14**	0.11**

NETWORK NAME	N	SECTOR	MATH	READING
National University Academy	170	CMO	-0.14**	-0.06**
Neighborhood Centers, Inc. (Promise Community School)	417	CMO	-0.05	-0.11**
New Beginning Schools Foundation	2,158	CMO	-0.15**	-0.03
New Orleans College Prep Academies	793	CMO	0.23**	0.00
Renew (Louisiana)	2,397	CMO	0.10	0.08**
New America Schools	437	CMO	-0.24**	-0.19**
New Frontiers Charter School, Inc.	608	CMO	0.00	-0.03
New Paradigm for Education	136	CMO	0.33**	0.22**
New Visions Academy	14	CMO	‡	‡
New Visions for Public School	2,754	CMO	-0.04	0.10
Newpoint Schools	1,160	VOS	-0.20**	-0.10**
Noble Network of Charter Schools	577	CMO	0.31**	0.19
Nova Academies	887	CMO	0.14**	0.09**
Ombudsman Educational Services, Ltd., a subsidiary of Educational Services of America	640	CMO	-0.09**	-0.15**
Omega Academy, Inc.	115	CMO	-0.11	-0.07
OmniVest Properties Management, LLC	5,313	VOS	0.11**	0.08**
Open Sky Education	717	CMO	-0.04**	0.07**
Opportunities for Learning	1,411	CMO	0.05	0.02
Options for Youth	1,939	CMO	0.06	-0.02
Orenda Education	1,256	CMO	-0.12**	-0.01
Panola Schools	110	CMO	-0.06	-0.11**
Para Los Ninos	165	CMO	0.10	0.03
Partnerships for Uplifting Communities (PUC)	2,533	CMO	0.19*	0.03
Perspectives Charter Schools	1,614	CMO	-0.04	-0.13
Pinecrest Academy	4,568	Hybrid	0.08*	0.06**
Pinnacle Education, Inc.	306	CMO	-0.19**	-0.20**
Pivot Charter School (Roads Education Organization)	73	CMO	-0.42**	-0.23**
Plato Academy Schools	1,990	CMO	0.13**	0.05**
Pointe Schools	1,938	CMO	-0.13**	-0.01
Pontiac Academy for Excellence	540	CMO	-0.10**	-0.04
Por Vida, Inc.	221	CMO	-0.17**	-0.26*
Portable Practical Educational Preparation Training for Employment Centers (PPEP & Affiliates)	619	CMO	0.01	-0.11
Premier High School ^F	1,263	CMO	-0.02	-0.03
Priority Charter Schools	453	CMO	-0.32**	-0.03
Propel Schools	2,966	CMO	0.09*	0.11**

NETWORK NAME	N	SECTOR	MATH	READING
Public Preparatory Network, Inc.	829	CMO	0.09**	0.07**
Quest Middle Schools ^F	932	CMO	-0.01	0.06
Rader Group	2,054	VOS	-0.16	-0.17
Rapoport Academy Public School (East Waco Innovative School Development, Inc.)	585	CMO	0.02	0.05
Raul Yzaguirre School for Success	1,920	CMO	0.02	0.03
Renew Charter Schools	2,397	CMO	0.10	0.08**
RePublic Charter Schools	715	CMO	0.26**	0.22**
Responsive Education Solutions (RES) ^F	9,208	CMO	-0.32**	-0.10**
Richard Allen Schools (Institute of Management and Resources, Inc.)	753	CMO	-0.08**	-0.07*
Richard Milburn Academies	1,387	CMO	-0.21**	-0.32**
Riverwalk Education Foundation, Inc.	2,365	CMO	0.11**	0.05**
Rocketship Education	1,205	CMO	0.12*	-0.02
Rocklin Academies	624	CMO	0.05	0.12**
Rose Management Group	917	CMO	-0.06**	-0.04*
Rylie Family Faith Academies, Inc. (A+ Charter Schools, Inc.)	3,629	CMO	0.04	0.03
S.M.A.R.T. Management	806	VOS	-0.08	0.05
Sabis International Schools Network	6,332	VOS	-0.04	-0.04
Scholar Academies	2,004	CMO	0.13	0.12
School of Excellence in Education (SEE)	1,185	CMO	-0.16	-0.06
See Forever Foundation (Maya Angelou PCS)	306	CMO	-0.15**	-0.09**
Ser-Ninos, Inc.	716	CMO	0.11**	0.06**
Shekinah Learning Institute, Inc.	987	CMO	-0.19*	-0.09*
SIATech (School for Integrated Academics and Technologies)	71	VOS	-0.27**	-0.17**
Sky Partnership	4,187	CMO	0.02	-0.07
Skyline Schools, Inc.	405	CMO	-0.07	-0.08
Solid Rock Management Company	955	VOS	-0.03	0.04**
Somerset Academy	14,951	Hybrid	0.11**	0.06**
South Texas Education Technologies, Inc.	810	CMO	-0.05	0.05
Southwest Schools (Educational Leadership, Inc.)	1,391	CMO	-0.08	-0.05
Southwest Winners Foundation, Inc.	795	CMO	-0.31**	-0.23**
St. Hope Public Schools	853	CMO	0.21**	0.15**
Strive Prep Charter Schools	5,279	CMO	0.17**	0.11**
Student Alternatives Program, Inc.	878	CMO	-0.03	-0.13**
Success Charter Network	168	CMO	0.40**	0.21**

NETWORK NAME	N	SECTOR	MATH	READING
Summit Academies	206	CMO	-0.14**	-0.10
Summit Public Schools	398	CMO	-0.06*	0.07
Synergy Academies	665	CMO	-0.04	-0.01
Tekoa Academy of Accelerated Studies	212	CMO	0.47**	0.35**
Texas Boys Choir	1,180	CMO	0.01	0.03
Texas Education Centers (Salvaging Teens at Risk)	568	CMO	-0.18*	-0.07*
The Charter Schools of Excellence	637	CMO	-0.04	-0.05
The Classical Academy (CO)	3,559	CMO	0.10*	0.04
The Classical Academies (CA)	1,262	CMO	0.04	0.05
The Graham Family of Schools	360	CMO	0.14**	0.03
The Influence 1 Foundation	455	CMO	0.01	0.03
The Romine Group, LLC	1,460	VOS	0.09	0.10**
The University Of Texas System (Tyler)	630	CMO	-0.26**	-0.08**
Tracy Learning Center	409	CMO	-0.06	0.02
Trinity Charter Schools	333	CMO	-0.24**	-0.07
Tucson International Academy	526	CMO	-0.14**	-0.05*
Two Dimensions Preparatory Charter	81	CMO	0.25**	0.17**
Uncommon Schools New York City ^G	7,099	CMO	0.17**	0.10**
Uncommon Schools Newark ^G	3,516	CMO	0.35**	0.25**
Uncommon Schools Rochester ^G	1,987	CMO	0.36**	0.20**
United Neighborhood Organization Charter School (UNO)	10,145	CMO	0.05**	0.04**
Universal Education Management Company	3,236	VOS	0.05	0.03
University of Chicago Charter School Corporation	1,465	CMO	0.01	0.05**
University of Texas - University Charter School	815	CMO	-0.33**	-0.20**
University Preparatory Academy	813	VOS	0.11**	0.09**
Uplift Education	8,425	CMO	0.04	0.08**
Varnett School, The	642	CMO	0.04	0.08**
Victory Schools	4,669	VOS	0.18**	0.09**
Vista Academies ^F	2,556	CMO	-0.07**	0.04**
Wayside Schools	645	CMO	0.00	-0.03
White Hat Management^H	14,179	VOS	-0.12**	-0.11**
Widening Advancements for Youth	14	CMO	‡	‡
Winfree Academy Charter School	266	CMO	-0.17**	-0.28**
Woodbridge Management & Education Services	445	VOS	0.07**	-0.02
YES Prep Public Schools	12,821	CMO	0.11**	0.10**

^A – Part of Aspira Associates, ^B – Part of Big Picture Learning, ^C – Part of K12, ^D – Part of KIPP, ^E – Part of Learning Matters Education Group, ^F – Part of ResponsiveEd, ^G – Part of Uncommon Schools, ^H – Part of White Hat Management

Networks in bold are for-profit organizations or associated with for-profit organizations for Hybrid charter networks.

**Significant at the 0.01 level. *Significant at the 0.05 level.

Appendix B: TECHNICAL APPENDIX

After constructing a VCR for each charter student, we then set out to develop a model capable of providing a fair measure of charter impact. The National Charter School Research Project provided a very useful guide to begin the process (Betts and Hill 2006). First, it was useful to consider student growth rather than achievement. A growth measure provided a strong method to control for each student's educational history as well as the many observable differences between students that affect their academic achievement. The baseline model included controls for each student's grade, race, gender, free or reduced-price lunch status, special education status, English language learner status, and whether they were held back the previous year. The literature on measuring educational interventions found that the best estimation techniques must also include controls for baseline test scores (Betts and Tang 2011). Each student's prior year test score is controlled for in our baseline model. Additional controls are also included for state, year and period (first year in charter, second year in charter, etc.). The study's baseline model is presented below.

$$\Delta A_{i,t} = \theta A_{i,t-1} + \beta X_{i,t} + \rho Y_t + \sigma S + \gamma C_{i,t} + \varepsilon_{i,t} \quad (1)$$

where the dependent variable is

$$\Delta A_{i,t} = A_{i,t} - A_{i,t-1} \quad (2)$$

And A_{it} is the state-by-test z-score for student i in period t ; A_{it-1} is the state-by-test z-score for student i in period $t - 1$; $X_{i,t}$ is a set of control variables for student characteristics and period, Y_t is a year fixed effect, S is a state fixed effect; C is a vector of variables for whether student i attended a charter school and what type of charter school in period t ; and ε is the error term. Errors are clustered around charter schools and their feeder patterns as well.

In addition to the baseline model above, we explored additional interactions beyond a simple binary to indicate charter enrollment. These included both “double” and “triple” interactions between the charter variable and student characteristics. For example, to identify the impact of charter schools on different racial groups, we estimate models that break the charter variable into “charter_black,” “charter_Hispanic,” etc. To further break down the impact of charters by race and poverty, the variables above were split again. For example, black students in charter schools are split further into students who qualify for free and reduced-price lunches (“charter_black_poverty”) and those who do not (“charter_black_nonpoverty”).

For the charter interactions with race/ethnicity variables, we determine statistical significance of the coefficient for a group based on the p-value of the coefficient. To compare between two different

subpopulations of students, we employ a Wald test between the two groups' coefficients. For example, to determine if tps_black is significantly different from ch_black , we include both in the same model and then compare the coefficients with a Wald test. If the p-value of the Wald F-statistic is less than .05, then we consider the difference significant.

The model in which we compute race/ethnic effect sizes also includes variables for special statuses such as charter students in poverty, charter students who receive ELL services, charter students who receive special education services and charter students who are retained. However, since every charter student must be included in one of the six $\text{charter_race/ethnicity}$ dummy variables, the coefficient for the charter_special status interaction dummy variables takes on a marginal relationship to the average charter effect. Essentially, a record cannot be charter_poverty without also being charter_some race/ethnic group. Thus, the charter_poverty coefficient produced in the regression model is the marginal difference between being the average charter student not in poverty and the average charter student in poverty.

We are interested in displaying the overall impact on the growth of a charter student in poverty compared to the 0.00 baseline which is a white TPS student who is not in poverty, not ELL, does not receive special education services and was not retained in the previous year. In order to determine if these charter special status interaction estimates plus the average charter effect estimates are statistically significantly different from the baseline 0.00, we conducted a series of weighted Wald tests. The weighted Wald test takes into account the average charter effects from race/ethnicity, the other special statuses, and the special status of interest. Equation 3 provides the weighted Wald test used to test the significance of coefficients for charter students in poverty compared to the 0.00 baseline (white TPS non-poverty, non-ELL, non-SPED, non-retained) in the models.

$$(\theta_{\text{White}} * \beta_{\text{Ch_White}} + \theta_{\text{Black}} * \beta_{\text{Ch_Black}} + \theta_{\text{Hispanic}} * \beta_{\text{Ch_Hispanic}} + \theta_{\text{Asian}} * \beta_{\text{Ch_Asian}} + \theta_{\text{NativeAm}} * \beta_{\text{Ch_NativeAm}} + \theta_{\text{Multiracial}} * \beta_{\text{Ch_Multiracial}} + \theta_{\text{ELL}} * \beta_{\text{Ch_ELL}} + \theta_{\text{SPED}} * \beta_{\text{Ch_SPED}} + \theta_{\text{Retained}} * \beta_{\text{Ch_Retained}}) + \beta_{\text{Ch_Poverty}} = 0 \quad (3)$$

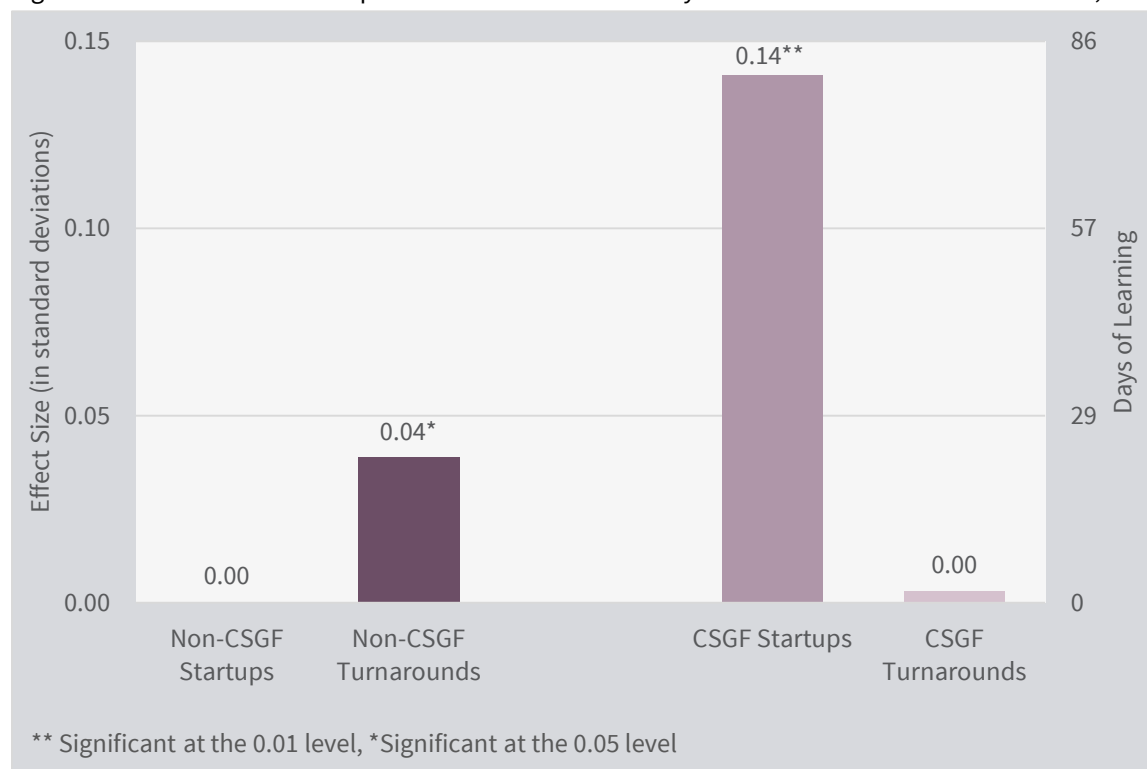
where θ represents the probability of a student belonging to a specific racial/ethnic group or special status group and β is the regression coefficient for each interaction term. The Wald test produces an F-statistic with degrees of freedom of (1, N-1) where N is the number of school clusters. If the p-value is less than .05, then the coefficient is considered to be significantly different from 0.00.

Appendix C: DATA APPENDIX

The first breakout is to determine if the overall results are the result of Charter School Growth Fund networks opening new charter schools, called start-ups, or of Charter School Growth Fund members taking over failed schools in what is known as a turn-around model. As with the overall Charter School Growth Fund analysis, we use non-Charter School Growth Fund charter schools to establish the performance we would expect in the charter sector absent the Charter School Growth Fund schools.

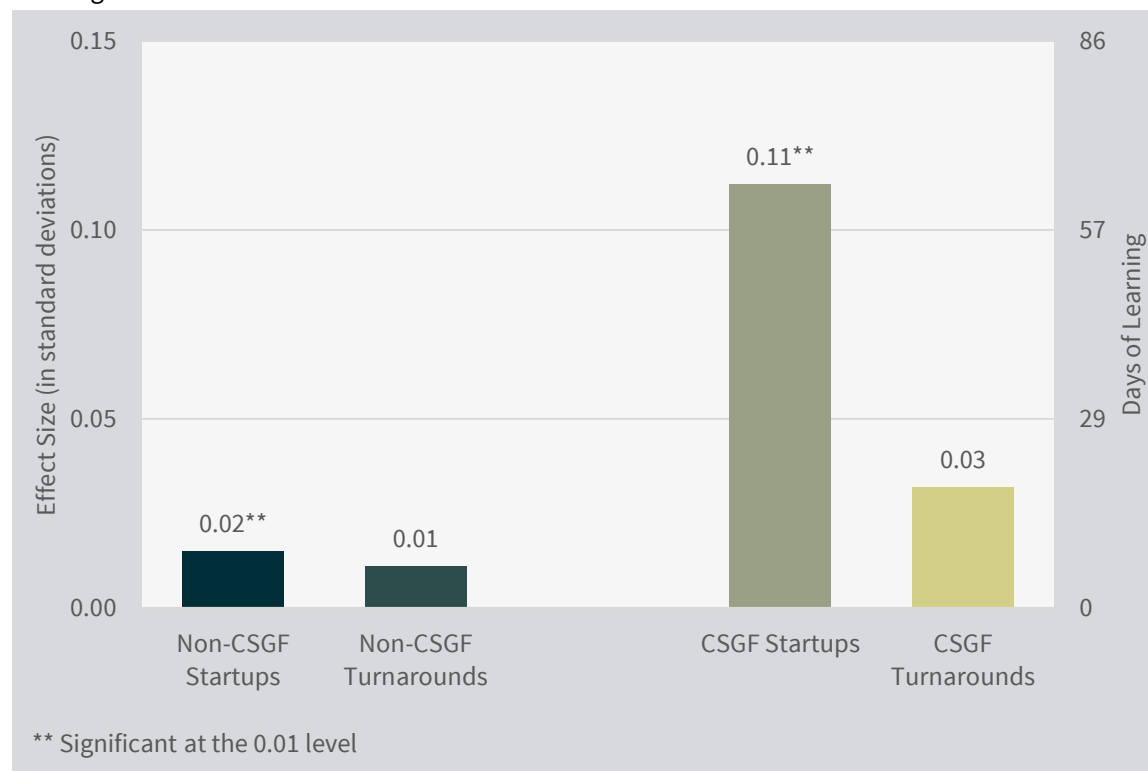
Figure 62 shows the math effect sizes for the four groups of schools. Charter School Growth Fund organizations have larger effect sizes with start-up model schools (i.e., new schools) than with turning around previously failed schools. Non-Charter School Growth Fund charter schools have a significant positive effect size for turn-around schools.

Figure 62: Effect Size for Start-up and Turn-around Schools by Charter School Growth Fund Status, Math



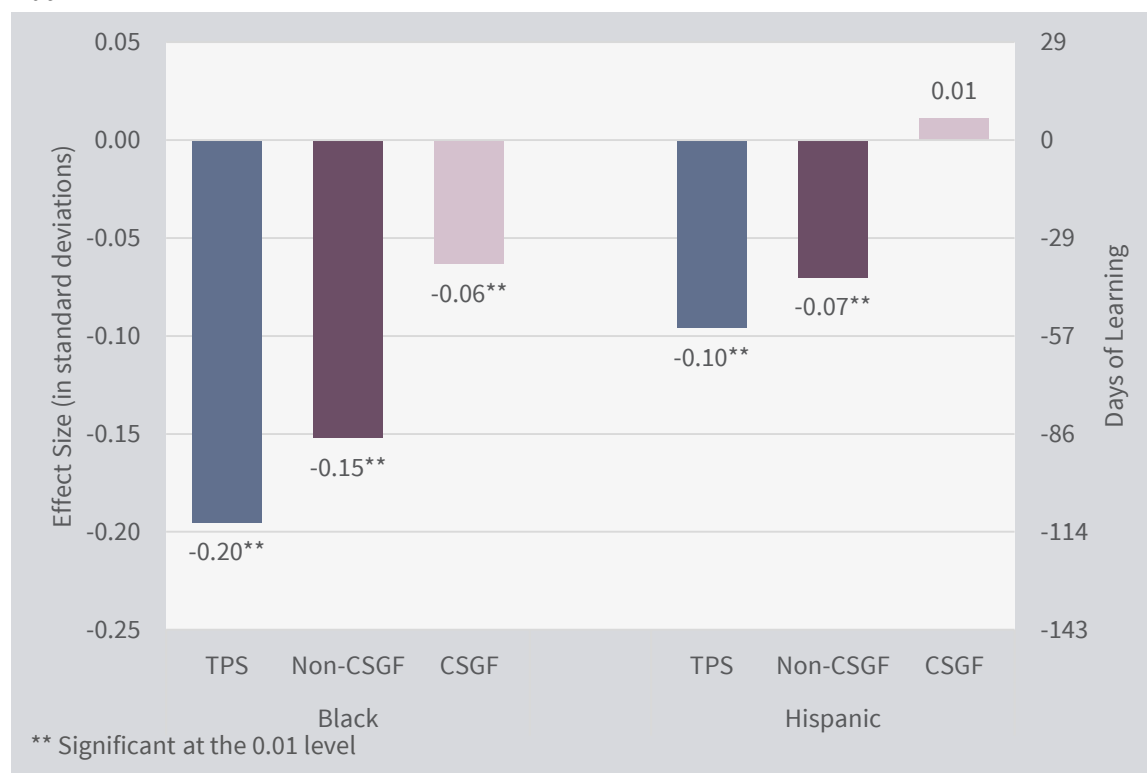
In reading, neither the Charter School Growth Fund nor non-Charter School Growth Fund charter schools have a significant effect with turn-around schools. Both Charter School Growth Fund schools and non-Charter School Growth Fund charter schools have significant positive effect sizes for start-up schools. The difference between Charter School Growth Fund start-up and non-Charter School Growth Fund charter start-up schools is 0.09 or about 51 days of learning.

Figure 63: Effect Size for Start-up and Turn-around Schools by Charter School Growth Fund Status, Reading



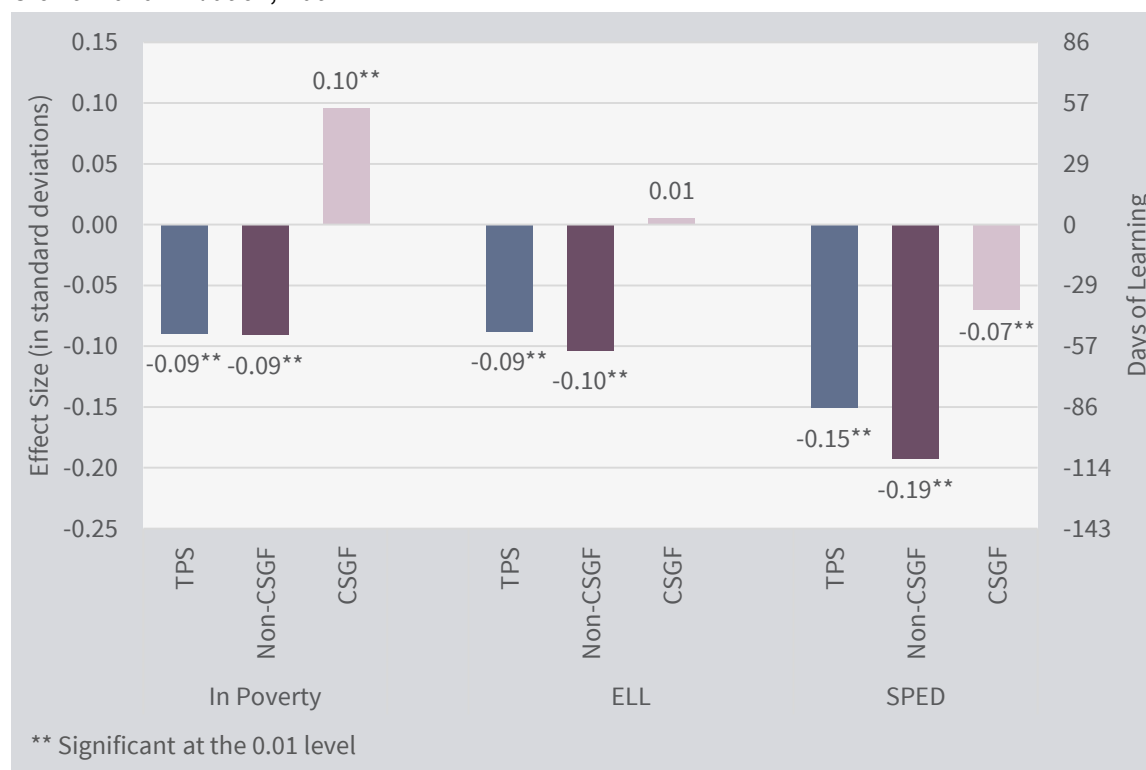
The next set of analyses examines Charter School Growth Fund's outcomes with populations which are historically underserved by the TPS sector. These are black students, Hispanic students, students in poverty, English language learners and students receiving special education services. Figures 64 and 65 display the results in math for these groups based on their enrollment in TPS, non-Charter School Growth Fund charters or Charter School Growth Fund schools. The results for black students and Hispanic students, Figure 64, show that for both groups students have significantly stronger growth when they attend a Charter School Growth Fund school. In fact, Hispanic students attending a Charter School Growth Fund school have growth which is not significantly different from that of white TPS students. For black students, the benefit of attending a Charter School Growth Fund school instead of a TPS is 0.14, which is equivalent to 80 days of additional learning per year.

Figure 64: Average Growth for Black and Hispanic Students by Charter School Growth Fund Affiliation, Math



Charter schools which are part of a Charter School Growth Fund network have positive impacts on other underserved populations as well. While students in poverty attending a Charter School Growth Fund school have weaker growth than their non-poverty peers in a Charter School Growth Fund school, the positive results of Charter School Growth Fund attendance more than offset the impact of being in poverty. Figure 65 shows the strong positive effect of 0.10 for Charter School Growth Fund students in poverty compared to non-poverty TPS students at 0.00. This means every year in a Charter School Growth Fund school, students in poverty close the poverty gap by 57 days in math. While the results are not as robust for ELL and SPED students, attending a Charter School Growth Fund school does still provide those students with the best opportunity for growth.

Figure 65: Average Growth for Students in Poverty, ELL Students, and SPED Students by Charter School Growth Fund Affiliation, Math



Outcomes in reading for underserved populations attending Charter School Growth Fund schools are impressively large as well. As shown in Figure 66, Hispanic students attending a Charter School Growth Fund school have average growth which is stronger than white TPS students. Again, the positive overall effect size indicates that Charter School Growth Fund charter schools are producing growth effects which will help to reverse the achievement gap between their Hispanic students and white TPS students. The effect for Hispanic students is equivalent to around 17 days of learning. While black students attending a Charter School Growth Fund school do not close the achievement gap, they minimize it when compared to the other two options: TPS or non-Charter School Growth Fund charter schools.

While the reading results for students in poverty, English language learners and special education students are not as strong as the math results, they follow a similar pattern (see Figure 67). Students in poverty have a net positive effect size which means they are closing the gap with their non-poverty TPS peers. ELL and SPED students do not close the gap, but Charter School Growth Fund affiliated schools produce the least negative results out of the three options. These findings along with the math results show a strong positive benefit for students from underserved populations who attend a Charter School Growth Fund school.

Figure 66: Average Growth for Black and Hispanic Students by Charter School Growth Fund Affiliation, Reading

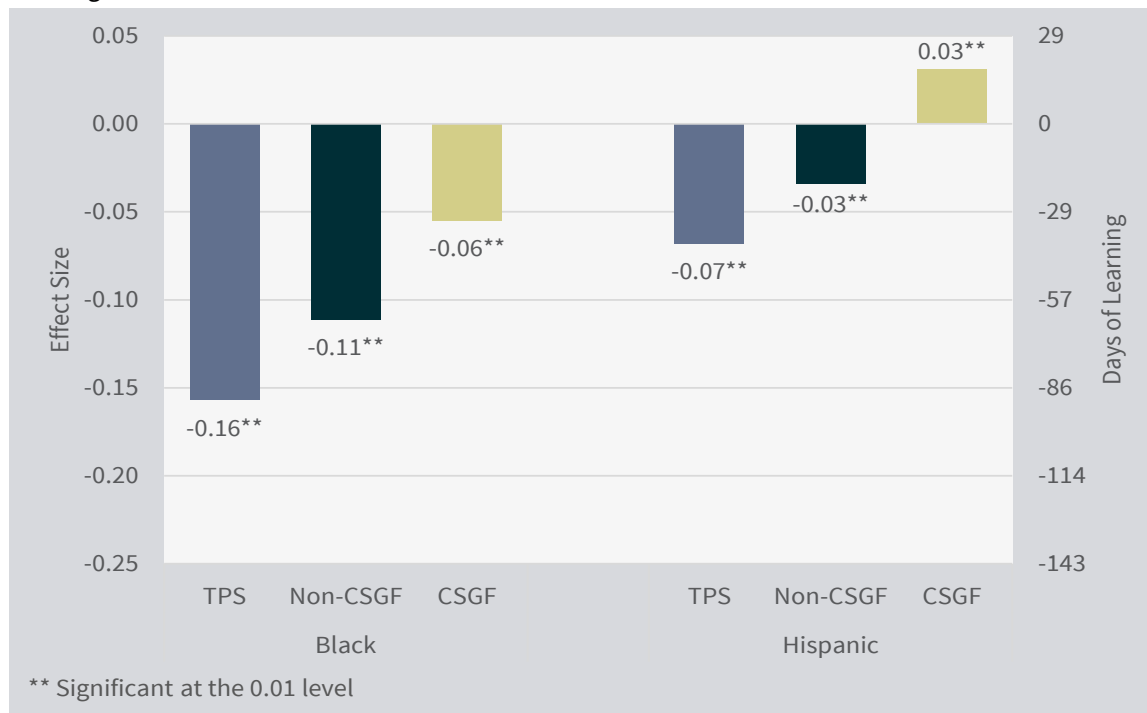
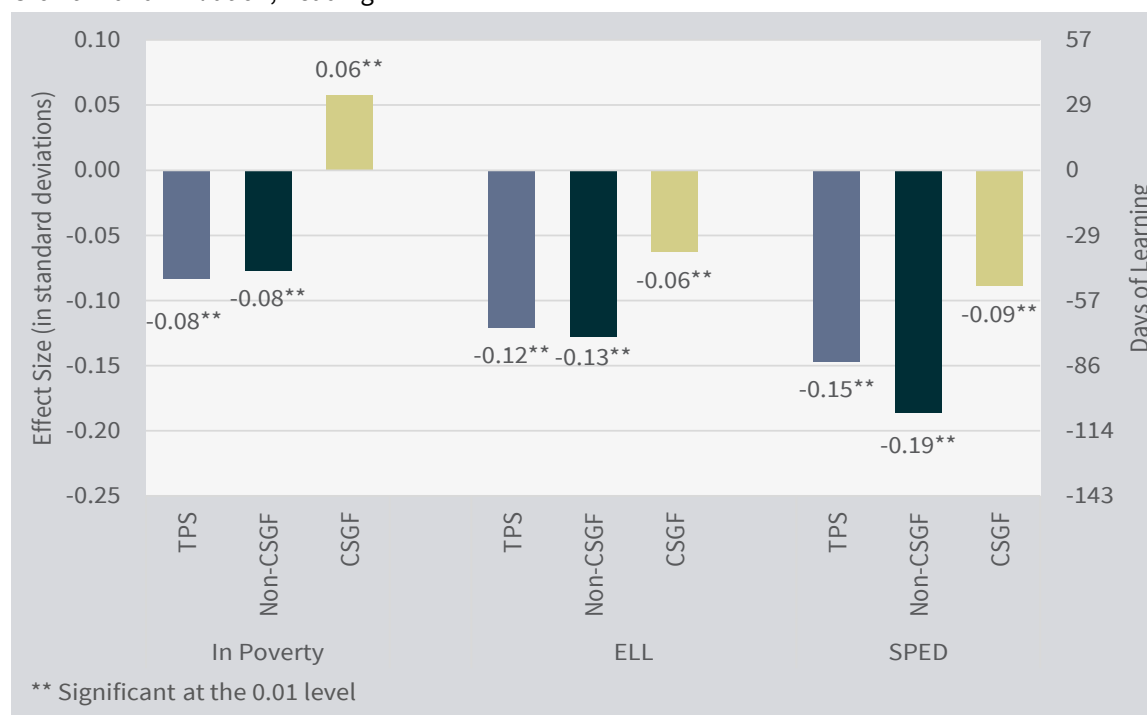


Figure 67: Average Growth for Students in Poverty, ELL Students, and SPED Students by Charter School Growth Fund Affiliation, Reading



Figures 10 through 13 have three different groups of students listed. Sector indicates students belonging to a particular group in the given sector: CMO, VOS or Hybrid. Non-sector students are those enrolled in a charter school which is not part of the listed sector. For example, non-sector for CMO would include students in independent charter schools and those in VOSs which are not also CMOs. The TPS group contains all the VCRs for all charter students.

Table 11: Charter Sector x Subpopulation, Math

Variable	CMO			VOS		
	Coefficient	Std. Err.	P-Value>	Coefficient	Std. Err.	P-Value>
sector_asianpi	0.19	0.02	0.000	0.11	0.04	0.004
sector_black	-0.13	0.01	0.000	-0.16	0.01	0.000
sector_ell	-0.11	0.01	0.000	-0.11	0.01	0.000
sector_hisp	-0.04	0.01	0.000	-0.06	0.02	0.000
sector_lunch	-0.07	0.01	0.000	-0.08	0.01	0.000
sector_multi	-0.07	0.02	0.000	-0.10	0.02	0.000
sector_nativam	-0.18	0.02	0.000	-0.19	0.03	0.000
sector_retained	0.13	0.02	0.000	0.13	0.02	0.000
sector_sped	-0.19	0.01	0.000	-0.18	0.01	0.000
sector_white	-0.07	0.02	0.000	-0.04	0.02	0.006
nonsector_asianpi	0.13	0.01	0.000	0.15	0.01	0.000
nonsector_black	-0.15	0.01	0.000	-0.14	0.01	0.000
nonsector_ell	-0.10	0.01	0.000	-0.10	0.01	0.000
nonsector_hisp	-0.08	0.01	0.000	-0.07	0.01	0.000
nonsector_lunch	-0.09	0.00	0.000	-0.09	0.00	0.000
nonsector_multi	-0.07	0.01	0.000	-0.06	0.01	0.000
nonsector_nativam	-0.13	0.02	0.000	-0.14	0.01	0.000
nonsector_retained	0.11	0.02	0.000	0.12	0.02	0.000
nonsector_sped	-0.19	0.01	0.000	-0.20	0.01	0.000
nonsector_white	-0.03	0.01	0.000	-0.03	0.01	0.000
tps_asianpi	0.15	0.01	0.000	0.14	0.01	0.000
tps_black	-0.19	0.01	0.000	-0.20	0.01	0.000
tps_ell	-0.09	0.01	0.000	-0.09	0.01	0.000
tps_hisp	-0.10	0.00	0.000	-0.10	0.00	0.000
tps_lunch	-0.09	0.00	0.000	-0.09	0.00	0.000
tps_multi	-0.04	0.00	0.000	-0.04	0.00	0.000
tps_nativam	-0.12	0.01	0.000	-0.12	0.01	0.000
tps_retained	0.16	0.01	0.000	0.16	0.01	0.000
tps_sped	-0.15	0.01	0.000	-0.15	0.01	0.000

Table 12: Charter Sector x Subpopulation Hybrid, Math

Variable	Hybrid		
	Coefficient	Std. Err.	P-Value>
sector_asianpi	0.19	0.04	0.000
sector_black	-0.15	0.03	0.000
sector_ell	-0.13	0.02	0.000
sector_hisp	0.03	0.02	0.131
sector_lunch	-0.07	0.01	0.000
sector_multi	-0.02	0.03	0.576
sector_nativam	-0.04	0.11	0.729
sector_retained	0.24	0.06	0.000
sector_sped	-0.19	0.02	0.000
sector_white	0.04	0.02	0.071
nonsector_asianpi	0.14	0.01	0.000
nonsector_black	-0.14	0.01	0.000
nonsector_ell	-0.10	0.01	0.000
nonsector_hisp	-0.07	0.01	0.000
nonsector_lunch	-0.09	0.00	0.000
nonsector_multi	-0.07	0.01	0.000
nonsector_nativam	-0.14	0.01	0.000
nonsector_retained	0.12	0.02	0.000
nonsector_sped	-0.19	0.01	0.000
nonsector_white	-0.04	0.01	0.000
tps_asianpi	0.14	0.01	0.000
tps_black	-0.20	0.01	0.000
tps_ell	-0.09	0.01	0.000
tps_hisp	-0.10	0.00	0.000
tps_lunch	-0.09	0.00	0.000
tps_multi	-0.04	0.00	0.000
tps_nativam	-0.12	0.01	0.000
tps_retained	0.16	0.01	0.000
tps_sped	-0.15	0.01	0.000

Table 13: Charter Sector x Subpopulation, Reading

Variable	CMO			VOS		
	Coefficient	Std. Err.	P-Value>	Coefficient	Std. Err.	P-Value>
sector_asianpi	0.14	0.01	0.000	0.12	0.03	0.000
sector_black	-0.11	0.01	0.000	-0.11	0.01	0.000
sector_ell	-0.15	0.01	0.000	-0.11	0.01	0.000
sector_hisp	-0.02	0.01	0.006	0.00	0.01	0.612
sector_lunch	-0.07	0.00	0.000	-0.08	0.01	0.000
sector_multi	-0.03	0.01	0.005	-0.04	0.01	0.002
sector_nativam	-0.12	0.02	0.000	-0.10	0.03	0.001
sector_retained	0.05	0.02	0.007	0.14	0.04	0.000
sector_sped	-0.21	0.01	0.000	-0.20	0.01	0.000
sector_white	-0.03	0.01	0.005	0.00	0.01	0.694
nonsector_asianpi	0.09	0.01	0.000	0.10	0.01	0.000
nonsector_black	-0.11	0.01	0.000	-0.11	0.01	0.000
nonsector_ell	-0.13	0.01	0.000	-0.14	0.01	0.000
nonsector_hisp	-0.04	0.00	0.000	-0.03	0.00	0.000
nonsector_lunch	-0.09	0.00	0.000	-0.08	0.00	0.000
nonsector_multi	-0.01	0.01	0.091	-0.01	0.01	0.054
nonsector_nativam	-0.09	0.02	0.000	-0.10	0.01	0.000
nonsector_retained	0.09	0.02	0.000	0.06	0.02	0.000
nonsector_sped	-0.19	0.01	0.000	-0.20	0.00	0.000
nonsector_white	0.00	0.00	0.963	-0.01	0.00	0.116
tps_asianpi	0.09	0.01	0.000	0.09	0.01	0.000
tps_black	-0.16	0.00	0.000	-0.16	0.00	0.000
tps_ell	-0.12	0.00	0.000	-0.12	0.00	0.000
tps_hisp	-0.07	0.00	0.000	-0.07	0.00	0.000
tps_lunch	-0.08	0.00	0.000	-0.08	0.00	0.000
tps_multi	-0.02	0.00	0.000	-0.02	0.00	0.000
tps_nativam	-0.10	0.01	0.000	-0.10	0.01	0.000
tps_retained	0.09	0.01	0.000	0.09	0.01	0.000
tps_sped	-0.15	0.00	0.000	-0.15	0.00	0.000

Table 14: Charter Sector x Subpopulation Hybrid, Reading

Variable	Hybrid		
	Coefficient	Std. Err.	P-Value>
sector_asianpi	0.14	0.03	0.000
sector_black	-0.12	0.02	0.000
sector_ell	-0.11	0.02	0.000
sector_hisp	0.04	0.01	0.000
sector_lunch	-0.06	0.01	0.000
sector_multi	-0.02	0.03	0.483
sector_nativam	-0.03	0.08	0.703
sector_retained	0.37	0.04	0.000
sector_sped	-0.20	0.02	0.000
sector_white	0.02	0.01	0.244
nonsector_asianpi	0.11	0.01	0.000
nonsector_black	-0.11	0.00	0.000
nonsector_ell	-0.14	0.01	0.000
nonsector_hisp	-0.03	0.00	0.000
nonsector_lunch	-0.08	0.00	0.000
nonsector_multi	-0.02	0.01	0.004
nonsector_nativam	-0.10	0.01	0.000
nonsector_retained	0.07	0.01	0.000
nonsector_sped	-0.20	0.00	0.000
nonsector_white	-0.01	0.00	0.120
tps_asianpi	0.09	0.01	0.000
tps_black	-0.16	0.00	0.000
tps_ell	-0.12	0.00	0.000
tps_hisp	-0.07	0.00	0.000
tps_lunch	-0.08	0.00	0.000
tps_multi	-0.02	0.00	0.000
tps_nativam	-0.11	0.01	0.000
tps_retained	0.09	0.01	0.000
tps_sped	-0.15	0.00	0.000

Table 15: Matched Charter Record Race/Ethnicity by State

State	Percent White	Percent Black	Percent Hispanic	Percent Asian	Percent Native American	Percent Multi-racial	N
AR	46.3%	46.0%	6.0%	0.7%	0.2%	0.8%	18,580
AZ	52.5%	4.4%	36.3%	3.6%	1.5%	1.7%	170,233
CA	34.0%	8.1%	49.5%	6.5%	0.3%	1.6%	213,485
CO	54.7%	5.1%	34.8%	2.8%	0.2%	2.4%	113,031
DC	4.1%	85.9%	8.8%	0.3%	0.1%	0.8%	22,273
FL	35.4%	19.6%	40.3%	2.6%	0.1%	1.9%	251,923
IL	4.1%	56.1%	37.8%	1.0%	0.1%	0.9%	46,132
LA	17.5%	79.3%	2.1%	0.4%	0.1%	0.5%	56,673
MA	42.9%	25.3%	25.6%	4.2%	0.2%	1.9%	37,240
MI	33.0%	56.3%	6.4%	2.4%	0.4%	1.6%	85,017
MN	48.9%	24.8%	8.5%	16.5%	1.2%	0.0%	36,824
MO	8.4%	76.9%	13.5%	0.5%	0.0%	0.7%	15,940
NC	65.1%	25.6%	4.7%	2.1%	0.5%	1.9%	53,459
NJ	9.3%	58.3%	27.9%	4.1%	0.0%	0.4%	31,871
NM	33.3%	1.4%	60.8%	0.9%	3.7%	0.0%	20,680
NV	56.0%	12.7%	21.6%	6.2%	0.6%	2.9%	13,738
NY	15.9%	68.0%	13.2%	0.8%	0.2%	1.9%	21,980
NYC	2.8%	57.2%	37.7%	2.0%	0.3%	0.1%	74,014
OH	37.1%	55.0%	3.2%	0.3%	0.1%	4.2%	50,255
OR	83.2%	1.6%	8.7%	1.4%	1.1%	4.0%	29,046
PA	34.1%	46.6%	14.7%	2.0%	0.1%	2.5%	122,988
RI	22.5%	14.7%	60.1%	0.7%	0.2%	1.8%	2,915
TN	4.7%	83.7%	11.2%	0.4%	0.0%	0.0%	24,485
TX	14.4%	17.5%	63.3%	3.7%	0.2%	0.9%	248,782
UT	81.5%	0.7%	13.2%	2.7%	0.2%	1.7%	56,266
WI	53.2%	28.1%	14.6%	3.9%	0.2%	0.0%	21,081

Table 16: Matched Charter Record Characteristics by State

State	Percent in Poverty	Percent ELL	Percent SPED	N
AR	64.1%	2.7%	6.9%	18,580
AZ	37.6%	1.9%	4.8%	170,233
CA	57.2%	11.6%	3.1%	213,485
CO	34.8%	9.7%	5.8%	113,031
DC	80.2%	2.3%	13.0%	22,273
FL	52.0%	4.4%	6.9%	251,923
IL	87.7%	6.1%	11.6%	46,132
LA	76.0%	0.5%	5.2%	56,673
MA	39.9%	4.7%	12.7%	37,240
MI	71.5%	5.6%	6.4%	85,017
MN	54.4%	17.9%	9.0%	36,824
MO	92.4%	9.3%	7.1%	15,940
NC	28.9%	0.3%	0.6%	53,459
NJ	74.2%	1.0%	7.9%	31,871
NM	56.4%	9.8%	9.3%	20,680
NV	33.9%	3.6%	8.4%	13,738
NY	81.8%	1.3%	7.2%	21,980
NYC	79.9%	3.4%	13.8%	74,014
OH	78.3%	0.3%	1.8%	50,255
OR	40.1%	1.0%	10.7%	29,046
PA	67.5%	2.2%	15.2%	122,988
RI	73.7%	7.3%	10.6%	2,915
TN	80.9%	2.5%	6.3%	24,485
TX	69.6%	15.2%	3.6%	248,782
UT	29.3%	1.9%	9.5%	56,266
WI	53.4%	4.6%	8.2%	21,081

The notation charter-nonsector in Tables 17 and 18 includes all students attending a charter school not in the given sector. For example, in the CMO column charter-nonsector would include non-network charters and VOS charters.

Table 17: Average Growth by Sector by Year

Sector_Year	CMO		VOS		Hybrid	
	Math	Reading	Math	Reading	Math	Reading
tps_2011	0.00	0.00	0.00	0.00	0.00	0.00
tps_2012	-0.01*	-0.02**	-0.01*	-0.02**	-0.01*	-0.02**
tps_2013	-0.02*	-0.03**	-0.02*	-0.03**	-0.02*	-0.03**
charter_nonsector_2011	-0.01	0.01**	0.00	0.01**	0.00	0.01**
charter_nonsector_2012	-0.01*	-0.01*	0.00	-0.01	0.00	-0.01
charter_nonsector_2013	-0.01*	-0.01	0.00	0.00	0.00	0.00
sector_2011	0.02	0.03**	0.01	0.03**	0.10**	0.08**
sector_2012	0.03*	0.00	0.00	0.00	0.10**	0.05**
sector_2013	0.03**	0.02*	-0.02	0.01	0.04**	0.06**

**Significant at the 0.01 level. *Significant at the 0.05 level.

Table 18: Average Growth by Years in Charter by Sector

Sector_Year	CMO		VOS		Hybrid	
	Math	Reading	Math	Reading	Math	Reading
charter_nonsector_1yr in charter	-0.09**	-0.07**	-0.08**	-0.07**	-0.08**	-0.07**
charter_nonsector_2yrs in charter	-0.01	0.00	0.02**	0.01	0.01*	0.01
charter_nonsector_3yrs in charter	0.04**	0.00	0.06**	0.03**	0.05**	0.02**
sector_1yr in charter	-0.05*	-0.06**	-0.10**	-0.06**	0.06*	0.04*
sector_2yrs in charter	0.06**	0.02**	-0.01	0.02	0.07**	0.08**
sector_3yrs in charter	0.08**	0.07**	0.03	0.01	0.12**	0.09**

**Significant at the 0.01 level. *Significant at the 0.05 level.

Figure 68: Interaction of Race/Ethnicity and Poverty on Growth for CMO Students, Reading

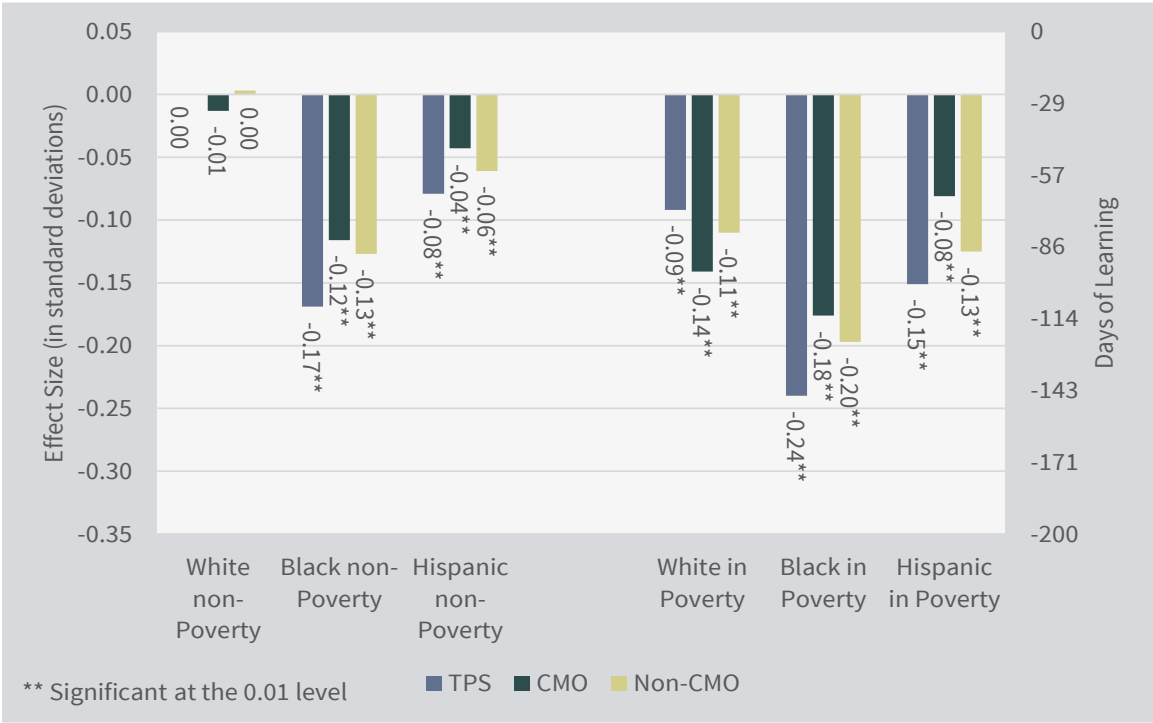


Figure 69: Interaction of Race/Ethnicity and Poverty on Growth for VOS Students, Reading

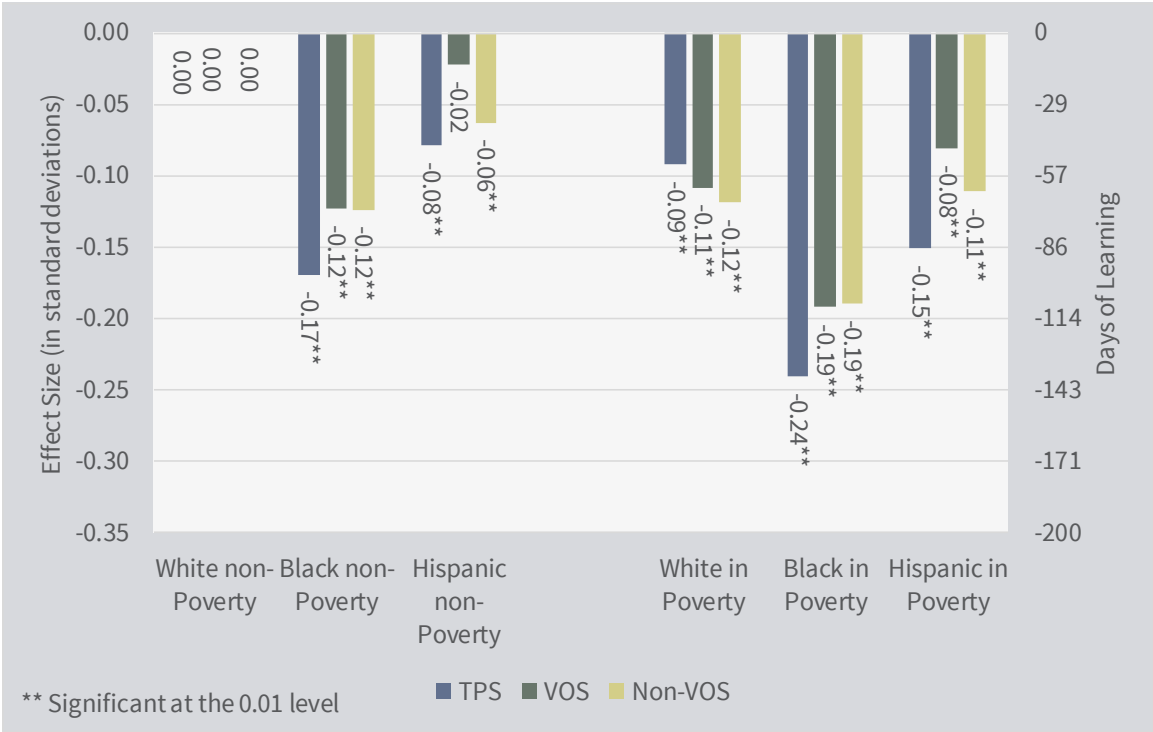
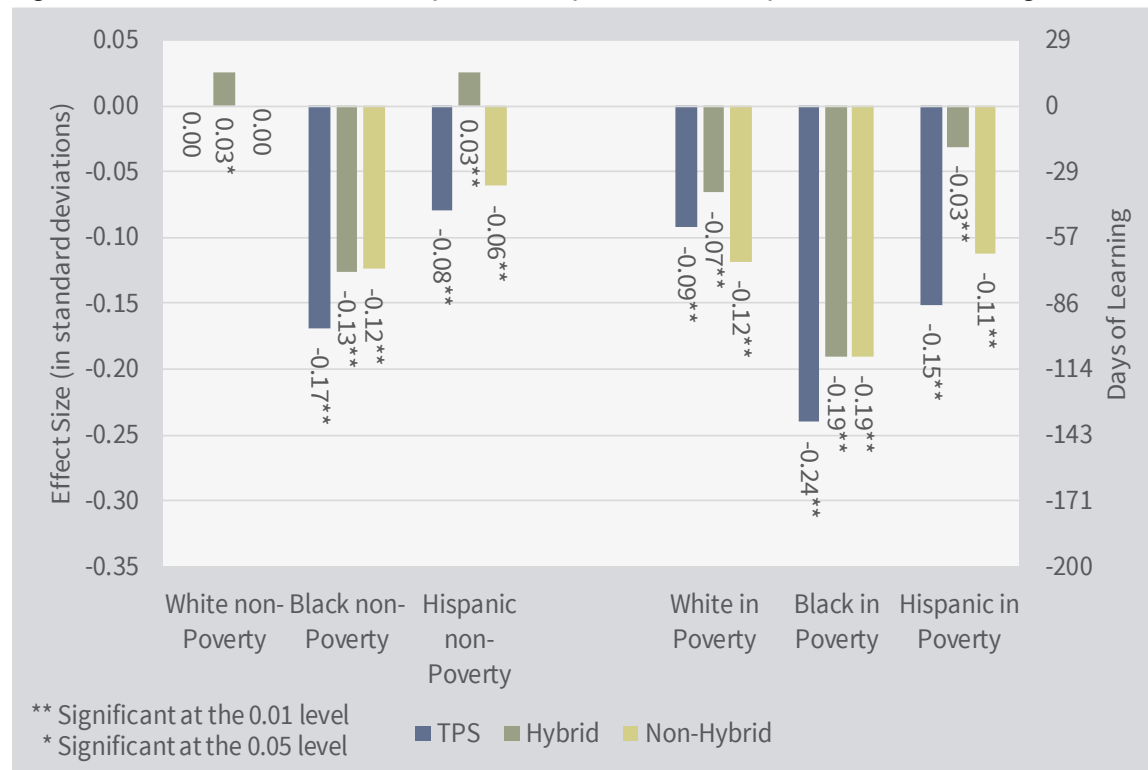


Figure 70: Interaction of Race/Ethnicity and Poverty on Growth for Hybrid Students, Reading



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Evidence of Serving Similar Student Populations - Opportunity Education

Opportunity Education has supported two private Quest Forward High Schools in Santa Rosa, CA, and Omaha, NE, since 2017. These schools have focused on providing an excellent, accessible education to a small community of students, focusing on the principles of engaged, active, and skills-forward learning that are also at the core of the proposed school charter school. These schools are unique in having the dual mission of, first, serving their students, and second, incubating some of the technologies and curricular and instructional strategies that will shape the Quest Forward Charter School. But in both capacities, they have positioned Opportunity Education to serve students in Iowa through sound strategies developed for and among comparable student populations.

Both of the Quest Forward High Schools serve diverse student populations. In Santa Rosa, nearly 40% of students identified as persons of color, mirrored by 43% in Omaha. At Santa Rosa, 26% of students live in homes where a language other than English is spoken. Schoolwide, about 40% of households earned less than \$55,000 annually from 2021-2023. In Omaha, nearly 75% of students receive substantial financial aid from the school.

The high schools make use of a distinctive curriculum designed by subject experts at Opportunity Education, in collaboration with teachers at the schools. The curriculum emphasizes active learning characterized by frequent projects, engineering tasks, experiments, and creation of creative projects or ‘artifacts.’ Students work toward the development of an array of skills, which are articulated across the curriculum and are frequently assessed and incorporated into goal-setting and class learning objectives. The design and use of this curriculum has been a foundation for refining instructional and curricular strategies for supporting active learning, which will be an asset in the lesson planning and professional development training that Opportunity Education can provide to the proposed charter school. (The school will not use the Quest Forward High Schools’ curriculum as its primary curriculum, so that the local teachers can adopt and design around curriculum directly aligned to Iowa standards. However, the numerous projects of this curriculum will be available to teachers and students at the proposed charter school to support differentiation and student-driven curiosity.)

While the pandemic has impacted a significant portion of these schools’ time, they and their students have achieved a variety of indications of soundness and success. Both schools have recently gained full accreditation by their respective agencies (The Western Association of Schools and Colleges, in Santa Rosa, and Cognia in Omaha). Santa Rosa courses are UC a-g approved and the school has NCAA clearance. Students, meanwhile, have a strong record of progressing toward their best-fit colleges and careers. Over the past three years, for instance, graduates from the high schools have outpaced national averages for college admissions to selective (3 out of 3 years), very selective (3 out of 3 years), and highly selective (2 out of 3 years) colleges.

Appendix K: 24.3.1. Evidence of past performance of other charter schools operated by the applicant.

Included below

- Evidence of past performance of charter schools operated by Academica

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEP-AM1A
Rule 6A 6.0786
August 2015

ESP			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure, with supporting documentation if applicable.	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating. F.S. Authorizes may find more detailed academic performance data at http://schoolgrades.fl DOE.org/ .	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
Year 2022 (Most Recent Year)								
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	Active	1290/87.8%	A	\$ 3,958,405	3.49%	No
Dade	Mater Academy East Charter School	13-3100	Active	466/89.5%	A	\$ (130,208)	-2.62%	No
Dade	Mater Academy East Charter Middle School	13-6009	Active	10/90%	A	\$ (56,817)	-19.59%	No
Dade	Mater Academy East Charter High School	13-7037	Active	4/NA	A	\$ 173,821	66.86%	No
Dade	Mater Academy of International Studies	13-1017	Active	487/95.1%	B	\$ 3,579,978	68.87%	No
Dade	Mater International Preparatory	13-6047	Active	214/95.8%	A	\$ 2,450,087	118.25%	No
Dade	Mater International Academy	13-3000	Active	205/98%	C	\$ 769,065	34.98%	No
Dade	Mater Academy Middle School	13-6012	Active	1187/87.2%	A	\$ 3,327,654	29.85%	No
Dade	Mater Academy High School	13-7160	Active	1544/83.5%	A	\$ 3,394,156	20.32%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	Active	327/80.1%	A	\$ 2,446,865	76.39%	No
Dade	Mater Gardens Academy	13-0312	Active	800/63%	A	\$ 57,048	0.68%	No
Dade	Mater Gardens Academy Middle School	13-6042	Active	NA	NA	NA	NA	No
Dade	Mater Lakes Academy Middle School	13-6033	Active	905/77.9%	B	\$ 3,320,528	40.38%	No
Dade	Mater Lakes Academy High School	13-7018	Active	1228/78.7%	A	\$ 3,927,213	30.97%	No
Dade	Mater Academy (Miami Beach)	13-5047	Active	627/77.1%	A	\$ 2,758,904	47.03%	No
Dade	Mater Grove Academy	13-5045	Active	1213/67.1%	A	\$ 4,790,944	41.68%	No
Dade	Mater Brickell Preparatory School	13-5046	Active	NA	NA	N/A	NA	No
Dade	Mater Academy at Mt. Sinai	13-5054	Active	151/61.6%	A	\$ 1,178,482	78.69%	No
Dade	iMater Academy	13-5384	Active	633/95.4%	C	\$ 4,031,829	56.90%	No
Dade	iMater Academy Middle School	13-6014	Active	776/93.4%	B	\$ 3,646,367	49.31%	No
Dade	iMater Preparatory Academy High School	13-7090	Active	989/91%	B	\$ 3,430,402	33.33%	No
Dade	Mater Academy Bay	13-4010	Active	929/60%	A	\$ 350,139	3.56%	No
Dade	Mater Academy Bay Middle	13-6032	Active	483/70.4%	A	\$ 126,395	2.50%	No
Dade	Mater Academy Bay High School	13-7120	Active	214/73.0%	A	\$ (201,438)	-6.72%	No
Dade	Mater Preparatory Academy	13-3003	Active	372/95.2%	C	\$ 266,025	6.62%	No
Dade	Mater Academy Biscayne North Miami Elementary School	13-2022	Active	88/31.8%	NA	\$ 379,811.00	13.99%	No
Dade	Mater Academy Virtual Middle High School	13-6997	Active	149/64.7%	I	\$ 138,475	14.27%	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	Active	978/94.3%	B	\$ 65,766	0.64%	No
Dade	Sports Leadership and Management Charter High School	13-7016	Active	850/91.4%	I	\$ 682,023	7.40%	No
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	13-6024	Active	246/93.5%	C	\$ 392,099	14.42%	No
Dade	SLAM Academy Charter High School (North Campus)	13-7108	Active	196/90.8%	C	\$ 390,326	21.30%	No
Dade	Ben Gamla Charter School	13-5022	Active	245/59.6%	A	\$ 308,621	12.15%	No
Dade	City of Hialeah Educational Academy	13-7262	Active	953/91.7%	A	\$ 2,220,891	23.22%	No
Dade	Doral Academy	13-3030	Active	1081/46.9%	A	\$ 8,778,670	69.50%	No
Dade	Just Arts and Management Middle School	13-6083	Active	267/52.4%	A	\$ 613,154	24.48%	No
Dade	Doral Academy of Technology	13-3029	Active	300/39.3%	A	\$ 4,290,640	151.02%	No
Dade	Doral Academy Charter Middle School	13-6030	Active	1353/53.5%	A	\$ 13,392,667	107.10%	No
Dade	Doral Academy Charter High School	13-7020	Active	1957/52.2%	A	\$ 2,552,916	12.03%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	Active	399/44.4%	A	\$ 3,907,972	95.85%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	Active	148/93.3%	C	\$ 188,938	8.74%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	Active	270/51.1%	A	\$ 1,140,786	38.48%	No
Dade	International Studies Charter Middle School	13-6045	Active	326/60.4%	A	\$ 1,363,520	44.41%	No
Dade	International Studies Charter High School	13-7007	Active	415/64.8%	A	\$ 2,222,454	49.83%	No
Dade	International Studies Virtual Academy	13-6017	Active	37/42.4%	NA	\$ 30,163	10.47%	No
Dade	Miami Children's Museum Charter School	13-4000	Active	304/40.1%	A	\$ 1,595,362	50.50%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	Active	564/63.2%	A	\$ 4,254,531	74.48%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	Active	499/69.7%	A	\$ 3,023,566	64.52%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	Active	509/64.6%	A	\$ 2,658,098	57.30%	No
Dade	Pinecrest Academy South Campus	13-0342	Active	750/66%	A	\$ 2,943,155	38.57%	No
Dade	Pinecrest Academy (North Campus)	13-5048	Active	395/63%	A	\$ 3,912,730	88.63%	No
Dade	Pinecrest North Preparatory (Fountainbleau Campus)	13-5004	Active	757/75.8%	A	\$ (48,272)	-0.68%	No
Dade	Pinecrest Cove Academy	13-5049	Active	944/62%	A	\$ 2,218,424	24.02%	No
Dade	Pinecrest Glades Academy	13-2031	Active	850/56.5%	A	\$ 3,847,347	45.97%	No
Dade	Pinecrest Glades Preparatory Academy Middle High School	13-7027	Active	887/60.7%	A	\$ 969,920	12.35%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	Active	836/74.2%	A	\$ 1,456,831	18.12%	No

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEPG-A1A
Rule 6A 6.0786
August 2015

ESP			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure, with supporting documentation if applicable.	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating. F.S. Authorizes may find more detailed academic performance data at http://schoolgrades.fl DOE.org/ .	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
Year 2022 (Most Recent Year)								
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	Active	250/75.2%	A	\$ 703,733	31.18%	No
Dade	Somerset Academy (Silver Palms)	13-0332	Active	1923/83.6%	A	\$ 1,352,641	6.99%	No
Dade	Somerset Academy High School (Miami-Dade)	13-7042	Active	872/82.4%	A	\$ 183,142	2.18%	No
Dade	Somerset Academy Silver Palms at Princeton	13-4012	Active	540/88.1%	B	\$ 2,239,302	39.52%	No
Dade	Somerset Arts Academy	13-2012	Active	404/75.7%	A	\$ 748,342	17.55%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	Active	NA	NA	N/A	#VALUE!	No
Dade	Somerset Oaks Academy	13-3033	Active	615/85%	B	\$ 904,445	14.21%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	Active	510/20.8%	A	\$ 1,629,664	29.39%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	Active	164/23.8%	A	\$ 813,880	58.38%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	Active	555/73.5%	A	\$ 1,662,486	28.91%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	Active	473/81%	B	\$ 1,109,678	22.81%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	Active	520/88.5%	C	\$ 177,326	3.39%	No
Dade	Somerset Gables Academy	13-5008	Active	472/29.4%	A	\$ (75,271)	-1.60%	No
Dade	Somerset Academy Bay	13-5062	Active	444/17.1%	A	\$ 966,578	20.40%	No
Dade	Somerset Academy Bay Middle School	13-6128	Active	234/16.7%	A	\$ 96,474	4.63%	No
Dade	Somerset Preparatory Academy Sunset	13-5002	Active	399/36.8%	A	\$ 1,055,442	27.98%	No
Dade	Somerset Palms Academy	13-5015	Active	290/55.5%	A	\$ 298,827	10.70%	No
Dade	Somerset Academy Kendall	13-4037	Active	225/35.1%	A	\$ 362,287	12.17%	No
Dade	Somerset Preparatory Academy- Homestead	13-0754	Active	344/83.5%	C	\$ 83,632	2.21%	No
Dade	Somerset Preparatory Academy Middle School (Homestead)	13-6046	Active	238/84.9%	B	\$ 223,936	7.73%	No
Dade	Somerset Preparatory Academy High School (Homestead)	13-7242	Active	189/82%	B	\$ 253,393	11.87%	No
Dade	Somerset Academy Virtual Middle High School	13-6016	Active	208/44.2%	C	\$ 32,332	2.77%	No
Broward	Somerset Academy	06-5141	Active	631/39.9%	A	\$ 1,697,349	31.42%	No
Broward	Somerset Academy Middle School	06-5151	Active	1022/32.3%	A	\$ 690,742	7.26%	No
Broward	Somerset Academy High School	06-5221	Active	1432/38.4%	A	\$ 675,823	5.43%	No
Broward	Somerset Arts Conservatory	06-5396	Active	371/24.3%	A	\$ 1,324,812	40.12%	No
Broward	Somerset Academy South	06-5263	Active	346/40.5%	A	\$ 318,862	8.81%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	Active	524/65.9%	A	\$ 710,121	13.36%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	Active	416/61.6%	A	\$ 655,353	18.79%	No
Broward	Somerset Academy Miramar South	06-5054	Active	218/53.7%	A	\$ 1,355,035	69.93%	No
Broward	Somerset Academy (Davie)	06-5211	Active	150/52.7%	A	\$ 389,525	28.98%	No
Broward	Somerset Academy East Preparatory	06-5391	Active	211/89.6%	B	\$ 1,003,972	49.07%	No
Broward	Somerset Academy Riverside	06-5387	Active	312/62.3%	B	\$ 132,608	3.59%	No
Broward	Somerset Academy Riverside Middle School	06-5419	Active	117/62.9%	B	\$ 163,385	10.89%	No
Broward	Somerset Parkland Academy	06-5056	Active	838/4.0%	A	\$ 80,733	1.02%	No
Broward	Somerset Village Academy	06-5004	Active	252/94.4%	B	\$ 1,113,367	44.95%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	Active	156/94.9%	B	\$ 297,297	20.69%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	Active	707/91.1%	B	\$ 1,209,636	17.58%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	Active	325/82.2%	C	\$ 1,307,928	44.56%	No
Broward	Somerset Academy Neighborhood School	06-5021	Active	447/67.7%	A	\$ 1,237,841	28.54%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	Active	344/73.5%	B	\$ 20,454	0.72%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	Active	253/75.5%	B	\$ 191,911	7.48%	No
Broward	Somerset Pines Academy	06-5030	Active	443/80.4%	C	\$ 1,345,573	30.84%	No
Broward	Somerset Academy Pompano	06-5388	Active	129/91.5%	B	\$ 34,474	2.56%	No
Broward	Somerset Academy Key Middle School	06-5413	Active	329/74.8%	C	\$ 307,011	9.81%	No
Broward	Somerset Academy Key Charter High School	06-5224	Active	284/75.7%	C	\$ 21,259	0.84%	No
Broward	Ben Gamla Charter School	06-5410	Active	375/27.2%	A	\$ 188,822	5.00%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	Active	260/28.8%	A	\$ 224,906	9.52%	No
Broward	Ben Gamla South Broward	06-5392	Active	281/80.9%	B	\$ 392,839	13.21%	No
Broward	Ben Gamla Preparatory Academy	06-5182	Active	76/72.4%	C	\$ 402,013	41.63%	No

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEP-A1A
Rule 6A 6.0786
August 2015

ESP			Status as of the date application is submitted. For any school that is closed, please attach separate page explaining reasons for closure, with supporting documentation if applicable.	Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating. F.S. Authorizes may find more detailed academic performance data at http://schoolgrades.fl DOE.org/ .	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
Year 2022 (Most Recent Year)								
District	School Name	MSID	Status (Active/Closed)	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Broward	International Studies Academy Middle School	06-5556	Active	189/48.5%	B	\$ 54,833	2.90%	No
Broward	International Studies Academy High School	06-5555	Active	187/63.6%	C	\$ 88,906	4.39%	No
Orange	Cornerstone Charter Academy	48-0133	Active	959/32.7%	A	\$ 5,723,166	56.45%	No
Orange	Cornerstone Charter High School	48-0146	Active	507/34.3%	B	\$ 2,753,124	55.63%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	Active	270/75.6%	A	\$ 226,408	8.18%	No
Orange	Pinecrest Creek Academy	48-0203	Active	106/87.6%	A	\$ 173,775	12.73%	No
Orange	Pinecrest Academy Avalon	48-0238	Active	416/38.5%	A	\$ 95,814	2.06%	No
Orange	Pinecrest Collegiate Academy Middle High School Charter	48-0283	Active	12/50%	A	\$ 40,599	34.30%	No
Duval	Somerset Academy (Eagle Campus)	16-1251	Active	379/82.6%	F	\$ 451,067	11.86%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	Active	178/79.8%	D	\$ 510,655	25.40%	No
Duval	Somerset Preparatory Academy	16-5501	Active	N/A	N/A	N/A	#VALUE!	No
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	Active	256/46.9%	A	\$ 423,175	14.36%	No
Palm Beach	Somerset Academy Boca	50-3413	Active	339/27.8%	A	\$ 1,258,015	35.67%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	Active	86/11.6%	A	\$ 538,206	61.18%	No
Palm Beach	Somerset Academy Canyons Middle School	50-4012	Active	685/52.8%	A	\$ 2,258,597	33.81%	No
Palm Beach	Somerset Academy Canyons High School	50-4013	Active	1035/50.8%	A	\$ 1,422,516	12.70%	No
Palm Beach	Somerset Academy Lakes Charter School	50-4091	Active	411/89.3%	C	\$ 602,766	13.94%	No
Palm Beach	Somerset Academy JFK Charter School	50-3395	Active	504/86.3%	D	\$ 40,851	0.78%	No
Palm Beach	Somerset Academy Wellington	50-4031	Active	342/58.8%	C	\$ 674,877	202.73%	No
Palm Beach	SLAM Palm Beach Charter Middle School	50-4090	Active	354/88.1%	C	\$ 330	0.01%	No
Palm Beach	SLAM Boca	50-4103	Active	811/50.9%	C	\$ 46,943	0.55%	No
Palm Beach	SLAM High School Palm Beach	50-4111	Active	276/85.5%	D	\$ 477,146	18.96%	No
Palm Beach	University Preparatory Academy Palm Beach	50-4080	Active	307/93.5%	D	\$ 211,678	6.30%	No
St. Lucie	Somerset College Preparatory Academy	56-0712	Active	1109/40.8%	A	\$ 350,452	3.72%	No
St. Lucie	Somerset Academy St. Lucie	56-0703	Active	672/49.4%	C	\$ 324,922	5.04%	No
St. Lucie	Somerset Academy Bethany	56-0731	Active	197/52.1%	C	\$ 170,762	6.00%	No
Monroe	Somerset Academy Island Preparatory	44-0382	Active	81/29.6%	B	\$ 423,710	41.86%	No
Osceola	Mater Brighton Lakes	49-0163	Active	1152/80.9%	C	\$ (37,678)	-0.35%	No
Osceola	The Mater Academy Preparatory High School	49-0971	Active	311/76.9%	D	\$ 20,552	0.53%	No
Osceola	Mater Palms Academy	49-0185	Active	865/70.5%	B	\$ 102,254	1.32%	No
Osceola	Mater Academy St. Cloud	49-0202	Active	398/60.3%	C	\$ 900,599	22.26%	No
Osceola	SLAM Osceola	49-0183	Active	137/69.9%	A	\$ 128,526	6.27%	No
Lake	Pinecrest Lakes Academy	35-9041	Active	775/31.1%	A	\$ 537,939	7.22%	No
Lake	Pinecrest Lakes Middle/High Academy	35-9061	Active	170/27.1%	A	\$ (46,219)	-2.89%	No
Lake	Pinecrest Academy Four Corners	35-9027	Active	418/56.2%	B	\$ 127,595	2.70%	No
Lake	Pinecrest Academy Tavares	35-9039	Active	649/34.8%	A	\$ 299,233	4.93%	No
Hillsborough	Sports Leadership and Management Academy Tampa	29-7815	Active	350/68%	C	\$ 135,564	2.59%	No
Hillsborough	SLAM Academy Tampa Elementary	29-7824	Active	19/52.6%	A	\$ 325,951	37.31%	No
Hillsborough	SLAM Academy at Apollo Beach	29-7825	Active	906/56%	C	\$ 1,142,767	14.10%	No
Brevard	Pinecrest Academy Space Coast	05-6558	Active	621/17.4%	A	\$ 362,712	6.27%	No
Pasco	Pinecrest Academy Wesley Chapel	51-4332	Active	818/36.5%	A	\$ 87,996	1.19%	No
Jefferson	Jefferson County Elementary A Somerset School	33-0111	Active	318/100%	D	\$ 846,622	11.65%	No
Jefferson	Jefferson County Middle A Somerset School	33-0021	Active	177/100%	D	\$ 47,958	1.56%	No
Jefferson	Jefferson County High A Somerset School	33-0024	Active	178/99.4%	D	\$ 280,452	7.41%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	Active	NA	NA	NA	NA	NA
Dade	Excelsior Academy High School	13-7054	Closed	NA	NA	NA	NA	NA
Brevard	Odyssey Charter School	05-6507	Active	NA	NA	NA	NA	NA
Brevard	Palm Bay Community Charter	05-6519	Closed	NA	NA	NA	NA	NA
Brevard	Palm Bay Municipal Charter High School	05-6520	Closed	NA	NA	NA	NA	NA
Pinellas	Ben Gamla Charter School	52-7321	Closed	NA	NA	NA	NA	NA
Monroe	Key West Montessori Charter School	44-0351	Active	NA	NA	NA	NA	NA
Palm Beach	Bright Futures Academy	50-3385	Active	NA	NA	NA	NA	NA

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEPC-A1A
Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fl DOE.org/ .	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
Year 2021							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	1296/87.9%	NA	\$ 3,338,662	25.14%	No
Dade	Mater Academy East Charter School	13-3100	557/80.4%	NA	\$ (138,702)	-2.48%	No
Dade	Mater Academy East Charter Middle School	13-6009	163/94.5%	NA	\$ 175,032	9.35%	No
Dade	Mater Academy East Charter High School	13-7037	123/92.7%	NA	\$ 463,403	30.09%	No
Dade	Mater Academy of International Studies	13-1017	499/96.8%	NA	\$ 2,990,210	56.74%	No
Dade	Mater International Preparatory	13-6047	204/96.1%	NA	\$ 2,275,464	114.36%	No
Dade	Mater International Academy	13-3000	200/98%	NA	\$ 682,762	31.07%	No
Dade	Mater Academy Middle School	13-6012	1248/87.4%	NA	\$ 3,812,395	32.45%	No
Dade	Mater Academy High School	13-7160	1641/82.6%	NA	\$ 4,033,548	24.44%	
Dade	Mater Performing Arts & Entertainment Academy	13-7014	309/83.8%	NA	\$ 2,304,020	74.42%	No
Dade	Mater Gardens Academy	13-0312	805/41.9%	NA	\$ 30,710	0.39%	No
Dade	Mater Gardens Academy Middle School	13-6042	NA	NA	NA	NA	NA
Dade	Mater Lakes Academy Middle School	13-6033	931/72.4%	NA	\$ 3,093,708	38.17%	No
Dade	Mater Lakes Academy High School	13-7018	1175/76.4%	NA	\$ 3,865,176	33.07%	No
Dade	Mater Academy (Miami Beach)	13-5047	620/69.7%	NA	\$ 2,574,860	44.46%	
Dade	Mater Grove Academy	13-5045	1199/58.5%	NA	\$ 4,548,664	41.24%	
Dade	Mater Brickell Preparatory School	13-5046	NA	NA	NA	NA	NA
Dade	Mater Academy at Mt. Sinai	13-5054	160/58.1%	NA	\$ 1,095,221	69.54%	No
Dade	iMater Academy	13-5384	695/91.5%	NA	\$ 3,829,145	52.76%	No
Dade	iMater Academy Middle School	13-6014	848/93%	NA	\$ 3,352,842	47.45%	No
Dade	iMater Preparatory Academy High School	13-7090	1045/89.4%	NA	\$ 2,940,635	30.07%	No
Dade	Mater Academy Bay	13-4010	863/56.2%	NA	\$ 1,491,215	15.77%	No
Dade	Mater Academy Bay Middle	13-6032	438/66.9%	NA	\$ (271,440)	-7.93%	No
Dade	Mater Academy Bay High School	13-7120	121/64.5%	NA	\$ 34,121	3.07%	No
Dade	Mater Preparatory Academy	13-3003	329/95.1%	NA	\$ 237,345	6.77%	No
Dade	Mater Academy Biscayne North Miami Elementary School	13-2022	NA	NA	NA	NA	NA
Dade	Mater Academy Virtual Middle High School	13-6997	80/32.5%	NA	\$ 15,595	2.26%	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	916/93.8%	NA	\$ 457,434	5.52%	No
Dade	Sports Leadership and Management Charter High School	13-7016	826/92%	NA	\$ (710,015)	-8.82%	No
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	13-6024	304/97%	NA	\$ 2,203,091	76.31%	No
Dade	SLAM Academy Charter High School (North Campus)	13-7108	118/98.3%	NA	\$ (41,197)	-3.93%	No
Dade	Ben Gamla Charter School	13-5022	250/59.2%	A	\$ 204,643	9.04%	No
Dade	City of Hialeah Educational Academy	13-7262	945/90.2%	NA	\$ 2,901,817	32.25%	No
Dade	Doral Academy	13-3030	1067/41%	A	\$ 7,392,082	65.87%	No
Dade	Just Arts and Management Middle School	13-6083	265/50.9%	A	\$ 464,405	20.44%	No
Dade	Doral Academy of Technology	13-3029	293/36.5%	A	\$ 3,535,626	141.50%	No
Dade	Doral Academy Charter Middle School	13-6030	1418/48.7%	A	\$ 10,608,864	88.02%	No
Dade	Doral Academy Charter High School	13-7020	1874/48.5%	A	\$ 5,382,775	30.417%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	426/39.2%	A	\$ 3,215,463	84.37%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	150/96%	NA	\$ 286,692	14.09%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	266/43.2%	A	\$ 902,159	34.43%	No
Dade	International Studies Charter Middle School	13-6045	323/57.9%	A	\$ 949,825	34.79%	No
Dade	International Studies Charter High School	13-7007	405/59%	A	\$ 2,159,633	56.26%	No
Dade	International Studies Virtual Academy	13-6017	30/33.3%	NA	\$ 30,161	17.13%	No
Dade	Miami Children's Museum Charter School	13-4000	315/25.1%	A	\$ 1,728,755	58.00%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	559/60.1%	NA	\$ 4,533,369	81.07%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	497/67.4%	NA	\$ 3,789,125	84.67%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	531/59.7%	NA	\$ 2,754,219	59.90%	No
Dade	Pinecrest Academy South Campus	13-0342	758/57.1%	NA	\$ 2,884,529	39.58%	No
Dade	Pinecrest Academy (North Campus)	13-5048	426/58.9%	A	\$ 3,459,902	77.78%	No
Dade	Pinecrest North Preparatory (Fontainebleau Campus)	13-5004	646/70.6%	A	\$ (160,655)	-2.84%	No
Dade	Pinecrest Cove Academy	13-5049	960/57.4%	NA	\$ 2,127,820	24.04%	No
Dade	Pinecrest Glades Academy	13-2031	876/53.1%	NA	\$ 3,908,422	48.57%	No
Dade	Pinecrest Glades Preparatory Academy Middle High School	13-7027	796/57.2%	NA	\$ 503,800	7.46%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	819/66.3%	NA	\$ 2,238,171	27.40%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	279/67.7%	NA	\$ 1,911,080	54.99%	No
Dade	Somerset Academy (Silver Palms)	13-0332	1969/79.6%	NA	\$ 1,154,792	6.19%	No

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Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fl DOE.org/ .	Unassigned Fund Balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/auden/ or request from authorizing district.
Year 2021							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy High School (Miami-Dade)	13-7042	833/77.8%	NA	\$ 345,283	4.58%	No
Dade	Somerset Academy Silver Palms at Princeton	13-4012	511/71.4%	NA	\$ 2,309,194	46.87%	No
Dade	Somerset Arts Academy	13-2012	414/75.1%	NA	\$ 1,214,687	26.24%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	NA	NA	NA	NA	No
Dade	Somerset Oaks Academy	13-3033	612/85.8%	NA	\$ 972,434	15.80%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	487/19.1%	A	\$ 2,165,315	42.96%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	158/23.4%	A	\$ 1,131,139	80.64%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	573/75.4%	NA	\$ 3,237,319	54.74%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	505/81.6%	NA	\$ 1,149,263	23.29%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	494/84.8%	NA	\$ (129,047)	-2.86%	No
Dade	Somerset Gables Academy	13-5008	502/24.1%	A	\$ (367,830)	-7.72%	No
Dade	Somerset Academy Bay	13-5062	426/13.6%	NA	\$ 747,512	16.76%	No
Dade	Somerset Academy Bay Middle School	13-6128	231/19.9%	A	\$ (128,046)	-6.51%	No
Dade	Somerset Preparatory Academy Sunset	13-5002	330/34.8%	A	\$ 914,367	29.21%	No
Dade	Somerset Palms Academy	13-5015	227/51.5%	B	\$ (40,153)	-1.82%	No
Dade	Somerset Academy Kendall	13-4037	205/42.4%	NA	\$ 85,621	3.73%	No
Dade	Somerset Preparatory Academy- Homestead	13-0754	239/77.4%	NA	\$ 148,824	5.57%	No
Dade	Somerset Preparatory Academy Middle School (Homestead)	13-6046	214/80.4%	NA	\$ 313,428	11.94%	No
Dade	Somerset Preparatory Academy High School (Homestead)	13-7242	143/76.9%	NA	\$ 183,067	11.01%	No
Dade	Somerset Academy Virtual Middle High School	13-6016	3/na	NA	\$ 11,876	26.33%	No
Broward	Somerset Academy	06-5141	651/34.1%	A	\$ 1,419,396	26.04%	No
Broward	Somerset Academy Middle School	06-5151	1126/28.2%	NA	\$ 74,233	0.78%	No
Broward	Somerset Academy High School	06-5221	1395/30.4%	NA	\$ (561,691)	-4.89%	No
Broward	Somerset Arts Conservatory	06-5396	389/22.9%	A	\$ 424,301	13.55%	No
Broward	Somerset Academy South	06-5263	331/30.8%	A	\$ 372,873	11.74%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	540/52.8%	NA	\$ 852,984	17.01%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	430/45.6%	NA	\$ 938,380	27.15%	No
Broward	Somerset Academy Miramar South	06-5054	216/42.6%	A	\$ 1,145,378	60.66%	No
Broward	Somerset Academy (Davie)	06-5211	150/47.3%	A	\$ 514,483	37.79%	No
Broward	Somerset Academy East Preparatory	06-5391	222/86.9%	NA	\$ 1,254,935	60.51%	No
Broward	Somerset Academy Riverside	06-5387	271/54.2%	C	\$ 205,163	7.37%	No
Broward	Somerset Academy Riverside Middle School	06-5419	113/46%	NA	\$ (7,057)	-0.68%	No
Broward	Somerset Parkland Academy	06-5056	534/16.7%	B	\$ 66,106	1.30%	No
Broward	Somerset Village Academy	06-5004	228/95.2%	NA	\$ 1,095,942	49.37%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	159/91.8%	NA	\$ 342,717	24.23%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	736/83.7%	NA	\$ 1,599,630	22.38%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	319/74%	NA	\$ 1,334,878	49.94%	No
Broward	Somerset Academy Neighborhood School	06-5021	494/65%	NA	\$ 1,197,987	27.09%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	347/59.1%	NA	\$ 170,608	6.20%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	278/29.1%	NA	\$ 217,816	8.87%	No
Broward	Somerset Pines Academy	06-5030	448/71.4%	C	\$ 1,526,934	36.51%	No
Broward	Somerset Academy Pompano	06-5388	119/83.2%	C	\$ 202,414	17.11%	No
Broward	Somerset Academy Key Middle School	06-5413	335/80.3%	NA	\$ 427,956	14.04%	No
Broward	Somerset Academy Key Charter High School	06-5224	268/84.7%	NA	\$ 157,861	7.32%	No
Broward	Ben Gamla Charter School	06-5410	454/27.5%	NA	\$ 1,781,312	44.31%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	207/27.5%	NA	\$ 20,203	1.19%	No
Broward	Ben Gamla South Broward	06-5392	348/78.2%	NA	\$ 241,567	7.50%	No
Broward	Ben Gamla Preparatory Academy	06-5182	376/42.3%	NA	\$ 8,653	0.26%	No
Broward	International Studies Academy Middle School	06-5556	NA	NA	NA	NA	NA
Broward	International Studies Academy High School	06-5555	NA	NA	NA	NA	NA
Orange	Cornerstone Charter Academy	48-0133	984/34.2%	NA	\$ 6,885,379	71.68%	No
Orange	Cornerstone Charter High School	48-0146	528/40%	NA	\$ 2,334,694	50.01%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	235/79.6%	A	\$ 274,079	11.24%	No

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEP-A11A
Rule 6A 6.0786
August 2015

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Year 2021							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Orange	Pinecrest Creek Academy	48-0203	100/78%	NA	\$ (2,704)	-0.20%	No
Orange	Pinecrest Academy Avalon	48-0238	364/38.2%	A	\$ 4,637	0.12%	No
Orange	Pinecrest Collegiate Academy Middle High School Charter	48-0283	13/23.1%	A	\$ 47,033	31.74%	No
Duval	Somerset Academy (Eagle Campus)	16-1251	273/86.4%	NA	\$ 457,966	15.71%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	163/84%	NA	\$ 450,518	26.38%	No
Duval	Somerset Preparatory Academy	16-5501	NA	NA	N/A	N/A	N/A
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	254/41.7%	NA	\$ 72,465	3.05%	No
Palm Beach	Somerset Academy Boca	50-3413	353/26.9%	NA	\$ 2,123,805	66.02%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	89/40.4%	A	\$ 395,194	51.69%	No
Palm Beach	Somerset Academy Canyons Middle School	50-4012	704/50.4%	NA	\$ 2,377,284	38.12%	No
Palm Beach	Somerset Academy Canyons High School	50-4013	966/46.5%	NA	\$ 1,675,238	18.88%	No
Palm Beach	Somerset Academy Lakes Charter School	50-4091	331/89.1%	NA	\$ 264,676	7.35%	No
Palm Beach	Somerset Academy JFK Charter School	50-3395	518/85.9%	NA	\$ 826,669	17.00%	No
Palm Beach	Somerset Academy Wellington	50-4031	213/58.2%	NA	\$ 413,932	15.67%	No
Palm Beach	SLAM Palm Beach Charter Middle School	50-4090	269/86.6%	NA	\$ 24,933	1.04%	No
Palm Beach	SLAM Boca	50-4103	645/47.6%	NA	\$ (215,276)	-3.37%	No
Palm Beach	SLAM High School Palm Beach	50-4111	152/78.3%	NA	\$ 40,891	2.56%	No
Palm Beach	University Preparatory Academy Palm Beach	50-4080	348/94.5%	NA	\$ 524,654	14.37%	No
St. Lucie	Somerset College Preparatory Academy	56-0712	1008/42.9%	A	\$ (162,465)	-0.07%	No
St. Lucie	Somerset Academy St. Lucie	56-0703	622/59.5%	NA	\$ (169,585)	-2.89%	No
St. Lucie	Somerset Academy Bethany	56-0731	38/60.5%	NA	\$ 339,099	30.99%	No
Monroe	Somerset Academy Island Preparatory	44-0382	65/29.2%	NA	\$ 280,513	29.98%	No
Osceola	Mater Brighton Lakes	49-0163	886/80.2%	NA	\$ 776,852	8.97%	No
Osceola	The Mater Academy Preparatory High School	49-0971	139/78.4%	NA	\$ 560,230	33.00%	No
Osceola	Mater Palms Academy	49-0185	839/80.6%	NA	\$ (181,395)	-2.45%	No
Osceola	Mater Academy St. Cloud	49-0202	268/64.6%	NA	\$ 544,103	19.94%	No
Osceola	SLAM Osceola	49-0183	144/79.9%	A	\$ 587,740	28.63%	No
Lake	Pinecrest Lakes Academy	35-9041	746/29.1%	A	\$ 228,173	3.30%	No
Lake	Pinecrest Lakes Middle/High Academy	35-9061	67/3%	B	\$ 93,036	14.96%	No
Lake	Pinecrest Academy Four Corners	35-9027	360/53.6%	NA	\$ 198,650	5.70%	No
Lake	Pinecrest Academy Tavares	35-9039	473/5.5%	A	\$ (171,935)	-3.58%	No
Hillsborough	Sports Leadership and Management Academy Tampa	29-7815	355/69.6%	NA	\$ (89,672)	-2.42%	No
Hillsborough	SLAM Academy Tampa Elementary	29-7824	NA	NA	NA	NA	NA
Hillsborough	SLAM Academy at Apollo Beach	29-7825	669/51.9%	NA	\$ 322,921	5.11%	No
Brevard	Pinecrest Academy Space Coast	05-6558	344/9.6%	A	\$ (8,181)	-0.22%	No
Pasco	Pinecrest Academy Wesley Chapel	51-4332	598/44.1%	B	\$ 440,602	7.29%	No
Jefferson	Jefferson County Elementary A Somerset School	33-0111	340/100%	NA	\$ 1,350,562	18.08%	No
Jefferson	Jefferson County Middle A Somerset School	33-0021	185/100%	NA	\$ 41,544	1.19%	No
Jefferson	Jefferson County High A Somerset School	33-0024	180/100%	NA	\$ 79,499	2.30%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	NA	NA	NA	NA	NA
Dade	Excelsior Academy High School	13-7054	NA	NA	NA	NA	NA
Brevard	Odyssey Charter School	05-6507	NA	NA	NA	NA	NA
Brevard	Palm Bay Community Charter	05-6519	NA	NA	NA	NA	NA
Brevard	Palm Bay Municipal Charter High School	05-6520	NA	NA	NA	NA	NA
Pinellas	Ben Gamla Charter School	52-7321	NA	NA	NA	NA	NA
Monroe	Key West Montessori Charter School	44-0351	NA	NA	NA	NA	NA
Palm Beach	Bright Futures Academy	50-3385	NA	NA	NA	NA	NA

Applicant Worksheet History - Addendum C
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Form IEP-41A
Rule 6A 6.0786
August 2015

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Year 2020							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	1192/90.3%	NA	\$ 2,237,622.00	20%	No
Dade	Mater Academy East Charter School	13-3100	495/86.7%	NA	\$ 507,656.00	11%	No
Dade	Mater Academy East Charter Middle School	13-6009	147/90.5%	NA	\$ 368,793.00	22%	No
Dade	Mater Academy East Charter High School	13-7037	141/87.2%	NA	\$ 450,413.00	21%	No
Dade	Mater Academy of International Studies	13-1017	487/97.7%	NA	\$ 2,698,835.00	58%	No
Dade	Mater International Preparatory	13-6047	177/94.4%	NA	\$ 2,311,882.00	152%	No
Dade	Mater International Academy	13-3000	185/99.5%	NA	\$ 534,808.00	30%	No
Dade	Mater Academy Middle School	13-6012	1305/85.7%	NA	\$ 2,760,038.00	25%	No
Dade	Mater Academy High School	13-7160	1618/81.9%	NA	\$ 2,636,279.00	19%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	314/82.2%	NA	\$ 2,061,441.00	77%	No
Dade	Mater Gardens Academy	13-0312	801/43.4%	NA	\$ 185,866.00	3%	No
Dade	Mater Gardens Academy Middle School	13-6042	NA	NA	NA	NA	No
Dade	Mater Lakes Academy Middle School	13-6033	856/76.2%	NA	\$ 2,890,930.00	41%	No
Dade	Mater Lakes Academy High School	13-7018	1212/76.7%	NA	\$ 3,496,838.00	36%	No
Dade	Mater Academy (Miami Beach)	13-5047	570/64.7%	NA	\$ 2,568,982.00	52%	No
Dade	Mater Grove Academy	13-5045	1129/51.3%	NA	\$ 3,836,932.00	35%	No
Dade	Mater Brickell Preparatory School	13-5046	NA	NA	NA	NA	No
Dade	Mater Academy at Mt. Sinai	13-5054	140/43.9%	NA	\$ 1,042,702.00	79%	No
Dade	iMater Academy	13-5384	680/89.4%	NA	\$ 3,206,910.00	48%	No
Dade	iMater Academy Middle School	13-6014	810/92.2%	NA	\$ 3,089,056.00	45%	No
Dade	iMater Preparatory Academy High School	13-7090	980/85.6%	NA	\$ 2,742,784.00	33%	No
Dade	Mater Academy Bay	13-4010	759/56.5%	NA	\$ 30,820.00	0%	No
Dade	Mater Academy Bay Middle	13-6032	365/63.6%	NA	\$ (71,960.00)	-2%	No
Dade	Mater Academy Bay High School	13-7120	29/58.6%	NA	\$ 51,294.00	21%	No
Dade	Mater Preparatory Academy	13-3003	272/84.6%	NA	\$ 226,764.00	8%	No
Dade	Mater Academy Biscayne North Miami Elementary School	13-2022	NA	NA	NA	NA	NA
Dade	Mater Academy Virtual Middle High School	13-6997	92/32.5%	NA	\$ 41,455.00	8%	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	897/90.3%	NA	\$ 414,147.00	5%	No
Dade	Sports Leadership and Management Charter High School	13-7016	678/87.9%	NA	\$ 164,864.00	3%	No
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	13-6024	287/96.9%	NA	\$ 345,338.00	13%	No
Dade	SLAM Academy Charter High School (North Campus)	13-7108	37/100%	NA	\$ 8,488.00	2%	No
Dade	Ben Gamla Charter School	13-5022	245/55.9%	NA	\$ 274,679.00	13%	No
Dade	City of Hialeah Educational Academy	13-7262	928/89.2%	NA	\$ 2,461,714.00	31%	No
Dade	Doral Academy	13-3030	1039/40.8%	NA	\$ 6,819,587.00	69%	No
Dade	Just Arts and Management Middle School	13-6083	245/46.9%	NA	\$ 616,166.00	32%	No
Dade	Doral Academy of Technology	13-3029	303/34.3%	NA	\$ 2,983,142.00	124%	No
Dade	Doral Academy Charter Middle School	13-6030	1483/44.7%	NA	\$ 8,589,523.00	76%	No
Dade	Doral Academy Charter High School	13-7020	1802/46.3%	NA	\$ 2,144,823.00	14%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	403/37.2%	NA	\$ 2,646,175.00	79%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	160/100%	NA	\$ 200,263.00	10%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	242/49.6%	NA	\$ 602,889.00	27%	No
Dade	International Studies Charter Middle School	13-6045	322/48.6%	NA	\$893,421	36%	No
Dade	International Studies Charter High School	13-7007	413/54.7%	NA	\$1,473,541	43%	No
Dade	International Studies Virtual Academy	13-6017	13/15.4%	NA	\$16,788	24%	No
Dade	Miami Children's Museum Charter School	13-4000	298/30.2%	NA	\$ 1,475,083.00	54%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	590/60.5%	NA	\$ 4,031,306.00	76%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	531/61.0%	NA	\$ 3,825,698.00	90%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	462/54.3%	NA	\$ 2,549,567.00	69%	No
Dade	Pinecrest Academy South Campus	13-0342	737/61.3%	NA	\$ 3,802,191.00	56%	No
Dade	Pinecrest Academy (North Campus)	13-5048	351/54.8%	NA	\$ 3,248,368.00	92%	No
Dade	Pinecrest North Preparatory (Fontainebleau Campus)	13-5004	412/26.8%	NA	\$ 56,525.00	1%	No
Dade	Pinecrest Cove Academy	13-5049	950/53.7%	NA	\$ 3,713,415.00	45%	No
Dade	Pinecrest Glades Academy	13-2031	788/52.1%	NA	\$ 2,376,654.00	34%	No
Dade	Pinecrest Glades Preparatory Academy Middle High School	13-7027	600/50.0%	NA	\$ 364,049.00	8%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	766/70.2%	NA	\$ 1,207,398.00	19%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	295/63.7%	NA	\$ 797,474.00	35%	No
Dade	Somerset Academy (Silver Palms)	13-0332	1906/79.8%	NA	\$ 1,211,262.00	7%	No

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Year 2020							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy High School (Miami-Dade)	13-7042	604/78.1%	NA	\$ 562,151.00	10%	No
Dade	Somerset Academy Silver Palms at Princeton	13-4012	396/78.3%	NA	\$ 690,896.00	19%	No
Dade	Somerset Arts Academy	13-2012	474/76.2%	NA	\$ 650,644.00	15%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	NA	NA	NA	NA	No
Dade	Somerset Oaks Academy	13-3033	611/87.2%	NA	\$ 921,470.00	17%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	453/16.6%	NA	\$ 1,792,973.00	41%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	177/11.3%	NA	\$ 1,130,307.00	83%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	585/81.2%	NA	\$ 3,381,055.00	63%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	556/80.8%	NA	\$ 1,034,452.00	22%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	438/82.6%	NA	\$ 89,336.00	2%	No
Dade	Somerset Gables Academy	13-5008	452/21.9%	NA	\$ 136,439.00	3%	No
Dade	Somerset Academy Bay	13-5062	397/16.1%	NA	\$ 159,773.00	4%	No
Dade	Somerset Academy Bay Middle School	13-6128	172/21.8%	NA	\$ 76,765.00	6%	No
Dade	Somerset Preparatory Academy Sunset	13-5002	311/37.1%	NA	\$ 815,640.00	29%	No
Dade	Somerset Palms Academy	13-5015	156/53.5%	NA	\$ 120,350.00	8%	No
Dade	Somerset Academy Kendall	13-4037	157/23.6%	NA	\$ 167,286.00	9%	No
Dade	Somerset Preparatory Academy- Homestead	13-0754	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy Middle School (Homestead)	13-6046	202/78.7%	NA	\$ 225,174.00	11%	No
Dade	Somerset Preparatory Academy High School (Homestead)	13-7242	70/70.9%	NA	\$ 87,401.00	8%	No
Dade	Somerset Academy Virtual Middle High School	13-6016	4/NA	NA	\$ 12,597.00	31%	No
Broward	Somerset Academy	06-5141	702/39.2%	NA	\$ 1,082,418.00	19%	No
Broward	Somerset Academy Middle School	06-5151	896/36.1%	NA	\$ 895,957.00	12%	No
Broward	Somerset Academy High School	06-5221	1177/39.6%	NA	\$ 167,786.00	2%	No
Broward	Somerset Arts Conservatory	06-5396	184/23.4%	NA	\$ 941,733.00	63%	No
Broward	Somerset Academy South	06-5263	296/36.1%	NA	\$ 196,818.00	7%	No
Broward	Somerset Academy (Miramar Campus)	06-5405	524/66.8%	NA	\$ 716,536.00	15%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	413/57.1%	NA	\$ 1,052,557.00	33%	No
Broward	Somerset Academy Miramar South	06-5054	212/50.5%	NA	\$ 1,560,509.00	87%	No
Broward	Somerset Academy (Davie)	06-5211	152/53.9%	NA	\$ 807,715.00	61%	No
Broward	Somerset Academy East Preparatory	06-5391	217/88.0%	NA	\$ 1,328,837.00	67%	No
Broward	Somerset Academy Riverside	06-5387	236/99.6%	NA	\$ 239,972.00	10%	No
Broward	Somerset Academy Riverside Middle School	06-5419	80/100.0%	NA	\$ 6,413.00	1%	No
Broward	Somerset Parkland Academy	06-5056	NA	NA	NA	NA	NA
Broward	Somerset Village Academy	06-5004	230/94.8%	NA	\$ 1,062,237.00	49%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	154/89.6%	NA	\$ 397,382.00	31%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	757/91.8%	NA	\$ 2,248,747.00	34%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	300/82.3%	NA	\$ 1,400,163.00	61%	No
Broward	Somerset Academy Neighborhood School	06-5021	492/83.1%	NA	\$ 1,195,620.00	26%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	315/73.3%	NA	\$ 567,937.00	23%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	269/69.1%	NA	\$ 149,130.00	7%	No
Broward	Somerset Pines Academy	06-5030	450/80.7%	NA	\$ 1,701,849.00	42%	No
Broward	Somerset Academy Pompano	06-5388	117/70.1%	NA	\$ 317,560.00	29%	No
Broward	Somerset Academy Key Middle School	06-5413	393/77.4%	NA	\$ 285,232.00	9%	No
Broward	Somerset Academy Key Charter High School	06-5224	248/97.6%	NA	\$ 102,888.00	5%	No
Broward	Ben Gamla Charter School	06-5410	504/30.0%	NA	\$ 361,726.00	9%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	152/29.6%	NA	\$ 125,244.00	10%	No
Broward	Ben Gamla South Broward	06-5392	339/79.9%	NA	\$ 265,075.00	9%	No
Broward	Ben Gamla Preparatory Academy	06-5182	391/50.9%	NA	\$ 32,554.00	1%	No
Broward	International Studies Academy Middle School	06-5556	NA	NA	NA	NA	NA
Broward	International Studies Academy High School	06-5555	NA	NA	NA	NA	NA
Orange	Cornerstone Charter Academy	48-0133	996/28.7%	NA	\$ 5,574,477.00	64%	No
Orange	Cornerstone Charter High School	48-0146	490/35.5%	NA	\$ 1,825,013.00	47%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	244/79.1%	NA	\$ 257,451.00	12%	No

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ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fdoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.50(11), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
Year 2020							
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Unassigned Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Orange	Pinecrest Creek Academy	48-0203	91/72.5%	NA	\$ 80,889.00	7%	No
Orange	Pinecrest Academy Avalon	48-0238	301/47.4%	NA	\$ 195,709.00	6%	No
Orange	Pinecrest Collegiate Academy Middle High School Charter	48-0283	11/54.5%	NA	\$ 38,242.00	37%	No
Duval	Somerset Academy (Eagle Campus)	16-1251	253/83.0%	NA	\$ 185,452.00	7%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	152/60.6%	NA	\$ 372,872.00	26%	No
Duval	Somerset Preparatory Academy	16-5501	NA	NA	NA	NA	No
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	243/36.1%	NA	\$ 158,425.00	7%	No
Palm Beach	Somerset Academy Boca	50-3413	357/27.1%	NA	\$ 2,038,269.00	65%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	66/27.7%	NA	\$ 415,288.00	83%	No
Palm Beach	Somerset Academy Canyons Middle School	50-4012	805/43.4%	NA	\$ 2,066,401.00	34%	No
Palm Beach	Somerset Academy Canyons High School	50-4013	859/40.9%	NA	\$ 1,913,437.00	26%	No
Palm Beach	Somerset Academy Lakes Charter School	50-4091	268/92.5%	NA	\$ 418,302.00	16%	No
Palm Beach	Somerset Academy JFK Charter School	50-3395	528/81.6%	NA	\$ 568,244.00	12%	No
Palm Beach	Somerset Academy Wellington	50-4031	71/56.9%	NA	\$ 817,274.00	45%	No
Palm Beach	SLAM Palm Beach Charter Middle School	50-4090	237/86.0%	NA	\$ 10,470.00	0%	No
Palm Beach	SLAM Boca	50-4103	431/46.8%	NA	\$ 131,677.00	3%	No
Palm Beach	SLAM High School Palm Beach	50-4111	72/73.2%	NA	\$ 288,915.00	28%	No
Palm Beach	University Preparatory Academy Palm Beach	50-4080	329/91.5%	NA	\$ 52,505.00	2%	No
St. Lucie	Somerset College Preparatory Academy	56-0712	959/43.1%	NA	\$ 350,228.00	5%	No
St. Lucie	Somerset Academy St. Lucie	56-0703	579/55.8%	NA	\$ 86,324.00	2%	No
St. Lucie	Somerset Academy Bethany	56-0731	NA	NA	NA	NA	NA
Monroe	Somerset Academy Island Preparatory	44-0382	53/46.0%	NA	\$ 217,662.00	29%	No
Osceola	Mater Brighton Lakes	49-0163	975/87.4%	NA	\$ 672,069.00	8%	No
Osceola	The Mater Academy Preparatory High School	49-0971	72/75.0%	NA	\$ 21,181.00	3%	No
Osceola	Mater Palms Academy	49-0185	714/79.6%	NA	\$ 266,118.00	5%	No
Osceola	Mater Academy St. Cloud	49-0202	215/62.3%	NA	\$ 447,217.00	19%	No
Osceola	SLAM Osceola	49-0183	127/81.9%	NA	\$ 34,073.00	2%	No
Lake	Pinecrest Lakes Academy	35-9041	746/24.5%	NA	\$ 66,725.00	1%	No
Lake	Pinecrest Lakes Middle/High Academy	35-9061	NA	NA	NA	NA	NA
Lake	Pinecrest Academy Four Corners	35-9027	222/59.9%	NA	\$ 148,755.00	7%	No
Lake	Pinecrest Academy Tavares	35-9039	NA	NA	NA	NA	NA
Hillsborough	Sports Leadership and Management Academy Tampa	29-7815	414/63.1%	NA	\$ 1,426.00	0%	No
Hillsborough	SLAM Academy Tampa Elementary	29-7824	NA	NA	NA	NA	NA
Hillsborough	SLAM Academy at Apollo Beach	29-7825	677/57.3%	NA	\$ 401,000.00	9%	No
Brevard	Pinecrest Academy Space Coast	05-6558	NA	NA	NA	NA	NA
Pasco	Pinecrest Academy Wesley Chapel	51-4332	NA	NA	NA	NA	NA
Jefferson	Jefferson County Elementary A Somerset School	33-0111	377/75.5%	NA	\$ 1,758,655.00	22%	No
Jefferson	Jefferson County Middle A Somerset School	33-0021	171/72.9%	NA	\$ 83,985.00	3%	No
Jefferson	Jefferson County High A Somerset School	33-0024	187/68.8%	NA	\$ 222,885.00	7%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	NA	NA	NA	NA	NA
Dade	Excelsior Academy High School	13-7054	NA	NA	NA	NA	NA
Brevard	Odyssey Charter School	05-6507	NA	NA	NA	NA	NA
Brevard	Palm Bay Community Charter	05-6519	NA	NA	NA	NA	NA
Brevard	Palm Bay Municipal Charter High School	05-6520	NA	NA	NA	NA	NA
Pinellas	Ben Gamla Charter School	52-7321	NA	NA	NA	NA	NA
Monroe	Key West Montessori Charter School	44-0351	NA	NA	NA	NA	NA
Palm Beach	Bright Futures Academy	50-3385	NA	NA	NA	NA	NA

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEPD-A1A
Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizes may find more detailed academic performance data at http://schoolgrades.fl.doe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
			Year -2019				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	1171/88.8%	A	\$ 2,469,431.00	23%	No
Dade	Mater Academy East Charter School	13-3100	487/86.7%	A	\$ 1,084,756.00	24%	No
Dade	Mater Academy East Charter Middle School	13-6009	139/91.9%	A	\$ 554,283.00	35%	No
Dade	Mater Academy East Charter High School	13-7037	204/93.5%	A	\$ 260,310.00	11%	No
Dade	Mater Academy of International Studies	13-1017	526/97.3%	A	\$ 2,523,068.00	52%	No
Dade	Mater International Preparatory	13-6047	162/96.3%	A	\$ 2,071,783.00	144%	No
Dade	Mater International Academy	13-3000	171/97.6%	B	\$ 355,980.00	20%	No
Dade	Mater Academy Middle School	13-6012	1344/85.6%	A	\$ 2,346,098.00	22%	No
Dade	Mater Academy High School	13-7160	1687/83.6%	B	\$ 1,750,069.00	12%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	331/79.7%	A	\$ 1,950,768.00	68%	No
Dade	Mater Gardens Academy	13-0312	648/51.7%	A	\$ 353,897.00	6%	No
Dade	Mater Gardens Academy Middle School	13-6042	186/47.8%	A	\$ (131,984.00)	-9%	No
Dade	Mater Lakes Academy Middle School	13-6033	851/75.7%	A	\$ 2,800,021.00	41%	No
Dade	Mater Lakes Academy High School	13-7018	291/77.2%	A	\$ 3,862,771.00	40%	No
Dade	Mater Academy (Miami Beach)	13-5047	582/69%	A	\$ 2,285,250.00	48%	No
Dade	Mater Grove Academy	13-5045	901/42.2%	A	\$ 2,182,613.00	29%	No
Dade	Mater Brickell Preparatory School	13-5046	189/37.2%	A	\$ 1,135,214.00	74%	No
Dade	Mater Academy at Mt. Sinai	13-5054	152/63.4%	A	\$ 951,052.00	70%	No
Dade	iMater Academy	13-5384	171/95.9%	B	\$ 2,736,984.00	42%	No
Dade	iMater Academy Middle School	13-6014	840/90.9%	A	\$ 2,637,512.00	39%	No
Dade	iMater Preparatory Academy High School	13-7090	922/86.8%	A	\$ 2,536,286.00	32%	No
Dade	Mater Academy Bay	13-4010	729/54.6%	B	\$ (82,136.00)	(0.013%)	No
Dade	Mater Academy Bay Middle	13-6032	215/43.1%	A	\$ 308,510.00	16%	No
Dade	Mater Academy Bay High School	13-7120	NA	NA	NA	NA	NA
Dade	Mater Preparatory Academy	13-3003	NA	NA	NA	NA	NA
Dade	Mater Academy Biscayne North Miami Elementary School	13-2022	NA	NA	NA	NA	NA
Dade	Mater Academy Virtual Middle High School	13-6997	23/17.4%	NA	\$ 39,236.00	20%	N/A
Dade	Sports Leadership and Management Charter Middle School	13-6015	684/92.5%	C	\$ 150,222.00	2%	No
Dade	Sports Leadership and Management Charter High School	13-7016	710/89.9%	B	\$ (28,881.00)	(0.005%)	No
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	13-6024	269/92.5%	C	\$ 434,259.00	17%	No
Dade	SLAM Academy Charter High School (North Campus)	13-7108	NA	NA	NA	NA	NA
Dade	Ben Gamla Charter School	13-5022	251/52.4%	A	\$ 227,983.00	11%	No
Dade	City of Hialeah Educational Academy	13-7262	933/87.4%	A	\$ 1,578,760.00	21%	NA
Dade	Doral Academy	13-3030	1166/42.6%	A	\$ 6,081,391.00	61%	No
Dade	Just Arts and Management Middle School	13-6083	230/49.1%	A	\$ 559,567.00	31%	No
Dade	Doral Academy of Technology	13-3029	300/39.8%	A	\$ 2,297,743.00	98%	No
Dade	Doral Academy Charter Middle School	13-6030	1438/48.8%	A	\$ 6,170,050.00	56%	No
Dade	Doral Academy Charter High School	13-7020	1800/51.9%	A	\$ 964,849.00	7%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	403/45.5%	A	\$ 2,296,171.00	71%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	154/99.3%	C	\$ (25,312.00)	(0.01%)	No
Dade	Integrated Science and Asian Culture Academy	13-2004	216/50%	A	\$ 375,714.00	19%	No
Dade	International Studies Charter Middle School	13-6045	321/58.7%	A	\$ 779,507	30%	No
Dade	International Studies Charter High School	13-7007	400/74.4%	A	\$ 1,133,946	33%	No
Dade	International Studies Virtual Academy	13-6017	14/6.1%	NA	\$ 8,466	10%	No
Dade	Miami Children's Museum Charter School	13-4000	292/34.9%	A	\$ 1,375,136.00	55%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	626/61.9%	A	\$ 3,767,370.00	71%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	514/65.7%	A	\$ 3,361,577.00	83%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	8.18%	A	\$ 2,362,825.00	61%	No
Dade	Pinecrest Academy South Campus	13-0342	803/58.3%	A	\$ 4,097,193.00	60%	No
Dade	Pinecrest Academy (North Campus)	13-5048	530/61.9%	A	\$ 2,820,592.00	65%	No
Dade	Pinecrest North Preparatory (Fountainbleau Campus)	13-5004	82/80.3%	NA	\$ 149,650.00	17%	NA
Dade	Pinecrest Cove Academy	13-5049	947/56.8%	A	\$ 3,013,739.00	37%	No
Dade	Pinecrest Glades Academy	13-2031	756/49.9%	A	\$ 1,448,957.00	23%	No
Dade	Pinecrest Glades Preparatory Academy Middle High School	13-7027	509/44.5%	A	\$ (533.00)	(0.0001%)	No
Dade	Somerset Academy (Miami-Dade)	13-0520	661/69%	A	\$ 1,425,906.00	24%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	272/62%	A	\$ 763,416.00	37%	No
Dade	Somerset Academy (Silver Palms)	13-0332	1820/78.8%	A	\$ 1,471,111.00	10%	No

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEP-A1A
Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizes may find more detailed academic performance data at http://schoolgrades.fl.doe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Applicant should indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at http://www.myflorida.com/audgen/ or request from authorizing district.
			Year -2019				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy High School (Miami-Dade)	13-7042	548/77.8%	A	\$ (9,735.00)	(0.002%)	No
Dade	Somerset Academy Silver Palms at Princeton	13-4012	236/80.3%	A	\$ 498,527.00	21%	No
Dade	Somerset Arts Academy	13-2012	405/76.4%	B	\$ 272,884.00	8%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	NA	NA	N/A	N/A	NA
Dade	Somerset Oaks Academy	13-3033	575/88.1%	C	\$ 1,106,294.00	22%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	431/16.3%	A	\$ 1,338,508.00	36%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	200/16.2%	A	\$ 1,055,629.00	71%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	556/78.7%	B	\$ 2,800,918.00	58%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	590/82.5%	A	\$ 1,340,987.00	28%	No
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	408/80.7%	B	\$ 54,072.00	2%	No
Dade	Somerset Gables Academy	13-5008	473/19.2%	A	\$ (43,865.00)	(0.01%)	No
Dade	Somerset Academy Bay	13-5062	276/3.3%	A	\$ 61,323.00	3%	No
Dade	Somerset Academy Bay Middle School	13-6128	91/2.2%	A	\$ (20,445.00)	(0.03%)	No
Dade	Somerset Preparatory Academy Sunset	13-5002	330/35.8%	B	\$ 469,733.00	17%	No
Dade	Somerset Palms Academy	13-5015	96/66.3%	A	\$ 4,496.00	0.003%	No
Dade	Somerset Academy Kendall	13-4037	72/16.7%	A	\$ 6,961.00	0.005%	NA
Dade	Somerset Preparatory Academy- Homestead	13-0754	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy Middle School (Homestead)	13-6046	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy High School (Homestead)	13-7242	NA	NA	NA	NA	NA
Dade	Somerset Academy Virtual Middle High School	13-6016	5/NA	NA	\$ 3,846.00	8%	NA
Broward	Somerset Academy	06-5141	667/36.7%	A	\$ 495,206.00	24%	No
Broward	Somerset Academy Middle School	06-5151	892/39.8%	A	\$ 1,094,775.00	16%	No
Broward	Somerset Academy High School	06-5221	1034/40.2%	A	\$ 254,610.00	3%	No
Broward	Somerset Arts Conservatory	06-5396	164/26.2%	A	\$ 791,801.00	61%	No
Broward	Somerset Academy South	06-5263	342/36.2%	NA	\$ (208,363.00)	(0.010%)	No
Broward	Somerset Academy (Miramar Campus)	06-5405	570/68.2%	A	\$ 495,206.00	11%	No
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	417/64%	A	\$ 1,564,040.00	48%	No
Broward	Somerset Academy Miramar South	06-5054	212/51.9%	A	\$ 1,352,582.00	75%	No
Broward	Somerset Academy (Davie)	06-5211	150/63.3%	A	\$ 1,118,368.00	86%	No
Broward	Somerset Academy East Preparatory	06-5391	237/84.8%	B	\$ 1,326,915.00	63%	No
Broward	Somerset Academy Riverside	06-5387	142/57.9%	D	\$ 241,319.00	14%	No
Broward	Somerset Academy Riverside Middle School	06-5419	44/52.5%	A	\$ (10,593.00)	(0.030%)	No
Broward	Somerset Parkland Academy	06-5056	NA	NA	NA	NA	NA
Broward	Somerset Village Academy	06-5004	246/95.8%	A	\$ 914,750.00	40%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	151/91.7%	B	\$ 361,272.00	28%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	754/93.1%	B	\$ 2,534,620.00	38%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	260/76.4%	C	\$ 1,114,355.00	54%	No
Broward	Somerset Academy Neighborhood School	06-5021	548/90.2%	A	\$ 2,494,104.00	24%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	350/89.6%	C	\$ 581,902.00	21%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	286/82.9%	I	\$ 246,516.00	11%	No
Broward	Somerset Pines Academy	06-5030	420/80.2%	C	\$ 1,540,764.00	40%	No
Broward	Somerset Academy Pompano	06-5388	138/87.9%	D	\$ 327,480.00	27%	No
Broward	Somerset Academy Key Middle School	06-5413	425/77.3%	C	\$ 226,442.00	7%	No
Broward	Somerset Academy Key Charter High School	06-5224	227/64.5%	C	\$ (3,812.00)	(0.002%)	No
Broward	Ben Gamla Charter School	06-5410	524/36.4%	A	\$ 157,818.00	4%	No
Broward	Ben Gamla Charter School (North Campus)	06-5001	135/24.2%	A	\$ 113,810.00	10%	No
Broward	Ben Gamla South Broward	06-5392	337/80.1%	C	\$ 232,259.00	8%	No
Broward	Ben Gamla Preparatory Academy	06-5182	492/55.4%	B	\$ 224,230.00	60%	No
Broward	International Studies Academy Middle School	06-5556	NA	NA	NA	NA	NA
Broward	International Studies Academy High School	06-5555	NA	NA	NA	NA	NA
Orange	Cornerstone Charter Academy	48-0133	1003/29.4%	A	\$ 3,509,529.00	41%	No
Orange	Cornerstone Charter High School	48-0146	478/38.6%	A	\$ 1,421,314.00	38%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	244/75.7%	A	\$ 585,585.00	28%	No

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEPC-A11A
Rule 6A 6.0786
August 2015

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			Year -2019				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Orange	Pinecrest Creek Academy	48-0203	109/90.6%	A	\$ 86,510.00	7%	No
Orange	Pinecrest Academy Avalon	48-0238	183/46.6%	A	\$ (30,372.00)	(0.01%)	No
Orange	Pinecrest Collegiate Academy Middle High School Charter	48-0283	NA	NA	NA	NA	NA
Duval	Somerset Academy (Eagle Campus)	16-1251	63/82.5%	A	\$ 315,673.00	37%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	127/95.9%	B	\$ 172,241.00	13%	No
Duval	Somerset Preparatory Academy	16-5501	213/90.4%	B	\$ 43,554.00	26%	NA
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	245/34.7%	B	\$ 217,151.00	10%	NA
Palm Beach	Somerset Academy Boca	50-3413	358/29.7%	A	\$ 1,680,255.00	57%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	65/40.6%	A	\$ 344,321.00	71%	N/A
Palm Beach	Somerset Academy Canyons Middle School	50-4012	829/42.7%	B	\$ 2,498,168.00	41%	No
Palm Beach	Somerset Academy Canyons High School	50-4013	18.74%	A	\$ 2,459,332.00	40%	N/A
Palm Beach	Somerset Academy Lakes Charter School	50-4091	237/92%	B	\$ 310,423.00	13%	N/A
Palm Beach	Somerset Academy JFK Charter School	50-3395	520/77.1%	A	\$ 391,105.00	9%	N/A
Palm Beach	Somerset Academy Wellington	50-4031	NA	NA	NA	NA	NA
Palm Beach	SLAM Palm Beach Charter Middle School	50-4090	224/89.4%	B	\$ 160,193.00	8%	N/A
Palm Beach	SLAM Boca	50-4103	236/53.4%	B	\$ 165,765.00	6%	No
Palm Beach	SLAM High School Palm Beach	50-4111	NA	NA	NA	NA	NA
Palm Beach	University Preparatory Academy Palm Beach	50-4080	285/92.3%	C	\$ (117,437.00)	(0.05%)	No
St. Lucie	Somerset College Preparatory Academy	56-0712	850/46.9%	A	\$ 22,362.00	0.003%	No
St. Lucie	Somerset Academy St. Lucie	56-0703	526/59.5%	B	\$ 453,361.00	11%	No
St. Lucie	Somerset Academy Bethany	56-0731	NA	NA	NA	NA	NA
Monroe	Somerset Academy Island Preparatory	44-0382	40/43.9%	B	\$ 172,422.00	38%	No
Osceola	Mater Brighton Lakes	49-0163	954/86.9%	B	\$ 381,043.00	5%	No
Osceola	The Mater Academy Preparatory High School	49-0971	NA	NA	NA	NA	NA
Osceola	Mater Palms Academy	49-0185	551/85.1%	A	\$ 270,888.00	6%	No
Osceola	Mater Academy St. Cloud	49-0202	90/49%	C	\$ 472,650.00	28%	No
Osceola	SLAM Osceola	49-0183	92/85.4%	D	\$ 186,199.00	13%	N/A
Lake	Pinecrest Lakes Academy	35-9041	606/32.5%	A	\$ 325,223.00	6%	No
Lake	Pinecrest Lakes Middle/High Academy	35-9061	NA	NA	NA	NA	NA
Lake	Pinecrest Academy Four Corners	35-9027	NA	NA	NA	NA	NA
Lake	Pinecrest Academy Tavares	35-9039	NA	NA	NA	NA	NA
Hillsborough	Sports Leadership and Management Academy Tampa	29-7815	532/70.3%	C	\$ 277,953.00	5%	No
Hillsborough	SLAM Academy Tampa Elementary	29-7824	NA	NA	NA	NA	NA
Hillsborough	SLAM Academy at Apollo Beach	29-7825	NA	NA	NA	NA	NA
Brevard	Pinecrest Academy Space Coast	05-6558	NA	NA	NA	NA	NA
Pasco	Pinecrest Academy Wesley Chapel	51-4332	NA	NA	NA	NA	NA
Jefferson	Jefferson County Elementary A Somerset School	33-0111	416/76.4%	D	\$ 1,601,006.00	28%	No
Jefferson	Jefferson County Middle A Somerset School	33-0021	182/87.7%	C	\$ (20,246.00)	(0.008%)	No
Jefferson	Jefferson County High A Somerset School	33-0024	176/79.5%	C	\$ (330,635.00)	(16%)	No
Dade	Excelsior Language Academy of Hialeah	13-5029	NA	NA	NA	NA	NA
Dade	Excelsior Academy High School	13-7054	NA	NA	NA	NA	NA
Brevard	Odyssey Charter School	05-6507	NA	NA	NA	NA	NA
Brevard	Palm Bay Community Charter	05-6519	NA	NA	NA	NA	NA
Brevard	Palm Bay Municipal Charter High School	05-6520	NA	NA	NA	NA	NA
Pinellas	Ben Gamla Charter School	52-7321	NA	NA	NA	NA	NA
Monroe	Key West Montessori Charter School	44-0351	NA	NA	NA	NA	NA
Palm Beach	Bright Futures Academy	50-3385	NA	NA	NA	NA	NA

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

Form IEPC-A1A
Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at
			Year -2018				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Mater Academy	13-0100	1122/89.2%	A	\$ 4,202,355.00	42%	Yes
Dade	Mater Academy East Charter School	13-3100	502/87.6%	A	\$ 1,382,130.00	31%	No
Dade	Mater Academy East Charter Middle School	13-6009	167/90.4%	B	\$ 568,242.00	30%	No
Dade	Mater Academy East Charter High School	13-7037	247/76.3%	B	\$ 133,328.00	5%	No
Dade	Mater Academy of International Studies	13-1017	536/95.1%	C	\$ 2,047,118.00	42%	No
Dade	Mater International Preparatory	13-6047	169/94.1%	A	\$ 1,296,768.00	92%	No
Dade	Mater International Academy	13-3000	165/96.4%	A	\$ 378,578.00	24%	Yes
Dade	Mater Academy Middle School	13-6012	1282/84.1%	A	\$ 2,104,085.00	21%	No
Dade	Mater Academy High School	13-7160	1742/79.9%	A	\$ 1,594,706.00	12%	No
Dade	Mater Performing Arts & Entertainment Academy	13-7014	342/78.9%	A	\$ 1,744,614.00	62%	No
Dade	Mater Gardens Academy	13-0312	596/50.8%	A	\$ 367,501.00	7%	Yes
Dade	Mater Gardens Academy Middle School	13-6042	203/50.2%	A	\$ 166,387.00	11%	No
Dade	Mater Lakes Academy Middle School	13-6033	848/75.9%	A	\$ 2,517,212.00	38%	No
Dade	Mater Lakes Academy High School	13-7018	1281/74.9%	B	\$ 3,491,610.00	33%	No
Dade	Mater Academy (Miami Beach)	13-5047	547/67.3%	A	\$ 1,962,784.00	49%	Yes
Dade	Mater Grove Academy	13-5045	707/60.7%	A	\$ 1,240,314.00	21%	No
Dade	Mater Brickell Preparatory School	13-5046	170/53.5%	A	\$ 931,936.00	70%	No
Dade	Mater Academy at Mt. Sinai	13-5054	167/65.3%	A	\$ 779,611.00	53%	No
Dade	iMater Academy	13-5384	662/88.7%	C	\$ 1,757,800.00	29%	No
Dade	iMater Academy Middle School	13-6014	804/88.9%	B	\$ 1,813,403.00	29%	No
Dade	iMater Preparatory Academy High School	13-7090	799/87.5%	A	\$ 1,855,157.00	29%	Yes
Dade	Mater Academy Bay	13-4010	480/55.4%	A	\$ 132,293.00	3%	No
Dade	Mater Academy Bay Middle	13-6032	93/34.4%	A	\$ 72,502.00	7%	No
Dade	Mater Academy Bay High School	13-7120	NA	NA	NA	NA	NA
Dade	Mater Preparatory Academy	13-3003	NA	NA	NA	NA	NA
Dade	Mater Academy Biscayne North Miami Elementary School	13-2022	NA	NA	NA	NA	NA
Dade	Mater Academy Virtual Middle High School	13-6997	NA/26.8%	A	\$ 64,817.00	20%	No
Dade	Sports Leadership and Management Charter Middle School	13-6015	606/92.6%	D	\$ 511,656.00	9%	No
Dade	Sports Leadership and Management Charter High School	13-7016	605/87.8%	B	\$ 170,400.00	3%	No
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	13-6024	148/95.9%	C	\$ 578,814.00	37%	No
Dade	SLAM Academy Charter High School (North Campus)	13-7108	NA	NA	NA	NA	NA
Dade	Ben Gamla Charter School	13-5022	248/46.8%	A	\$ 201,623.00	9%	No
Dade	City of Hialeah Educational Academy	13-7262	824/86.4%	A	\$ 1,231,059.00	19%	No
Dade	Doral Academy	13-3030	1076/41%	A	\$ 5,885,144.00	60%	Yes
Dade	Just Arts and Management Middle School	13-6083	176/40.9%	A	\$ 634,181.00	46%	No
Dade	Doral Academy of Technology	13-3029	216/36.6%	A	\$ 855,352.00	51%	No
Dade	Doral Academy Charter Middle School	13-6030	1189/47.5%	A	\$ 2,263,119.00	26%	No
Dade	Doral Academy Charter High School	13-7020	1673/49.9%	A	\$ 1,918,971.00	15%	No
Dade	Doral Performing Arts and Entertainment Academy	13-7009	395/44.1%	A	\$ 540,752.00	18%	No
Dade	Theodore R. and Thelma A. Gibson Charter School	13-2060	153/94.1%	B	\$ 49,021.00	3%	No
Dade	Integrated Science and Asian Culture Academy	13-2004	183/54.1%	A	\$ 282,224.00	17%	Yes
Dade	International Studies Charter Middle School	13-6045	312/76.0%	A	\$ 750,526.00	31%	No
Dade	International Studies Charter High School	13-7007	404/74.8%	A	\$ 1,034,508.00	32%	No
Dade	International Studies Virtual Academy	13-6017	NA	NA	\$ 13,565.00	31%	No
Dade	Miami Children's Museum Charter School	13-4000	294/34.4%	C	\$ 1,251,857.00	52%	No
Dade	Pinecrest Preparatory Academy Charter School	13-0600	604/63.1%	A	\$ 3,498,127.00	67%	No
Dade	Pinecrest Preparatory Academy Charter Middle School	13-6022	527/64.1%	A	\$ 2,862,709.00	71%	No
Dade	Pinecrest Preparatory Academy High School	13-7053	497/56.1%	A	\$ 2,065,865.00	54%	No
Dade	Pinecrest Academy South Campus	13-0342	750/3.1%	A	\$ 3,194,644.00	48%	No
Dade	Pinecrest Academy (North Campus)	13-5048	516/64.7%	A	\$ 2,529,797.00	60%	No
Dade	Pinecrest North Preparatory (Fontainebleau Campus)	13-5004	NA	NA	NA	NA	NA
Dade	Pinecrest Cove Academy	13-5049	938/55.2%	A	\$ 1,915,260.00	24%	No
Dade	Pinecrest Glades Academy	13-2031	586/51.9%	A	\$ 828,901.00	16%	No
Dade	Pinecrest Glades Preparatory Academy Middle High School	13-7027	319/49.3%	A	\$ 230,791.00	8%	No
Dade	Somerset Academy (Miami-Dade)	13-0520	659/62.7%	A	\$ 1,917,760.00	35%	No
Dade	Somerset Academy Middle School (Miami-Dade)	13-6004	241/48.4%	A	\$ 815,340.00	46%	No
Dade	Somerset Academy (Silver Palms)	13-0332	797/76.3%	A	\$ 1,566,951.00	22%	No

Applicant Worksheet History - Addendum C
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Rule 6A 6.0786
August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at
			Year -2018				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Dade	Somerset Academy High School (Miami-Dade)	13-7042	407/76.4%	A	\$ (133,020.00)	-4%	No
Dade	Somerset Academy Silver Palms at Princeton	13-4012	759/73.4%	A	\$ 1,087,347.00	17%	No
Dade	Somerset Arts Academy	13-2012	407/67.3%	B	\$ 663,750.00	19%	No
Dade	Somerset Academy Middle School (Country Palms)	13-6043	NA	NA	NA	NA	NA
Dade	Somerset Oaks Academy	13-3033	581/84.3%	C	\$ 1,048,871.00	21%	No
Dade	Somerset Academy Elementary School (South Miami Campus)	13-2007	407/16.5%	A	\$ 1,703,464.00	48%	No
Dade	Somerset Academy Middle School (South Miami)	13-6053	218/14.7%	A	\$ 972,461.00	62%	No
Dade	Somerset Academy Charter Elementary School (South Homestead)	13-0339	531/7.2%	A	\$ 2,805,955.00	59%	No
Dade	Somerset Academy Charter Middle School (South Homestead)	13-6013	510/79.0%	A	\$ 905,711.00	23%	Yes
Dade	Somerset Academy Charter High School (South Homestead)	13-7034	339/77.6%	B	\$ 136,990.00	5%	No
Dade	Somerset Gables Academy	13-5008	478/16.5%	A	\$ 225,530.00	6%	No
Dade	Somerset Academy Bay	13-5062	275/15.4%	A	\$ 411,087.00	18%	No
Dade	Somerset Academy Bay Middle School	13-6128	71/38.9%	A	\$ 51,925.00	10%	No
Dade	Somerset Preparatory Academy Sunset	13-5002	297/11.8%	A	\$ 220,619.00	9%	No
Dade	Somerset Palms Academy	13-5015	NA	NA	NA	NA	NA
Dade	Somerset Academy Kendall	13-4037	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy- Homestead	13-0754	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy Middle School (Homestead)	13-6046	NA	NA	NA	NA	NA
Dade	Somerset Preparatory Academy High School (Homestead)	13-7242	NA	NA	NA	NA	NA
Dade	Somerset Academy Virtual Middle High School	13-6016	NA	NA	\$ 2,369.00	5%	No
Broward	Somerset Academy	06-5141	941/34.9%	A	\$ 2,768,346.00	23%	No
Broward	Somerset Academy Middle School	06-5151	748/38.8%	A	\$ 915,819.00	17%	No
Broward	Somerset Academy High School	06-5221	885/37.2%	A	\$ 373,925.00	6%	No
Broward	Somerset Arts Conservatory	06-5396	129/24.0%	A	\$ 777,615.00	79%	No
Broward	Somerset Academy South	06-5263	NA	NA	NA	NA	NA
Broward	Somerset Academy (Miramar Campus)	06-5405	548/63.0%	A	\$ 1,310,415.00	27%	Yes
Broward	Somerset Academy Middle School (Miramar Campus)	06-5406	430/57.0%	A	\$ 1,873,878.00	59%	No
Broward	Somerset Academy Miramar South	06-5054	182/44.5%	A	\$ 1,532,954.00	-1%	No
Broward	Somerset Academy (Davie)	06-5211	153/62.1%	A	\$ 1,117,126.00	88%	No
Broward	Somerset Academy East Preparatory	06-5391	225/75.6%	B	\$ 1,200,290.00	60%	No
Broward	Somerset Academy Riverside	06-5387	24/83.3%	NA	\$ 176,643.00	80%	No
Broward	Somerset Academy Riverside Middle School	06-5419	19/73.7%	B	\$ 40,332.00	29%	No
Broward	Somerset Parkland Academy	06-5056	NA	NA	NA	NA	NA
Broward	Somerset Village Academy	06-5004	261/95.0%	C	\$ 747,951.00	34%	No
Broward	Somerset Academy Village Charter Middle School	06-5002	140/92.1%	B	\$ 299,542.00	26%	No
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	06-5003	786/92.0%	C	\$ 2,196,190.00	34%	No
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	06-5006	249/97.2%	C	\$ 1,171,485.00	62%	No
Broward	Somerset Academy Neighborhood School	06-5021	540/2.0%	A	\$ 2,768,346.00	23%	No
Broward	Somerset Preparatory Academy Charter Middle School	06-5441	333/75.7%	B	\$ 543,590.00	22%	No
Broward	Somerset Academy Charter High School (Miramar Campus)	06-5007	286/67.5%	B	\$ 256,602.00	12%	No
Broward	Somerset Pines Academy	06-5030	353/71.5%	D	\$ 1,349,795.00	38%	No
Broward	Somerset Academy Pompano	06-5388	159/17.6%	C	\$ 188,151.00	13%	No
Broward	Somerset Academy Key Middle School	06-5413	376/74.5%	D	\$ 312,610.00	11%	Yes
Broward	Somerset Academy Key Charter High School	06-5224	176/60.2%	D	\$ 106,313.00	7%	No
Broward	Ben Gamla Charter School	06-5410	539/50.9%	A	\$ 108,779.00	3%	Yes
Broward	Ben Gamla Charter School (North Campus)	06-5001	114/37.7%	A	\$ 295.00	0%	No
Broward	Ben Gamla South Broward	06-5392	365/78.4%	B	\$ 68,427.00	2%	Yes
Broward	Ben Gamla Preparatory Academy	06-5182	260/55.0%	B	\$ 354,648.00	20%	No
Broward	International Studies Academy Middle School	06-5556	NA	NA	NA	NA	NA
Broward	International Studies Academy High School	06-5555	NA	NA	NA	NA	NA
Orange	Cornerstone Charter Academy	48-0133	979/22.1%	A	\$ 2,657,104.00	33%	No
Orange	Cornerstone Charter High School	48-0146	453/26.0%	A	\$ 1,211,396.00	35%	No
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	48-0155	254/89.3%	A	\$ 581,246.00	28%	Yes

Applicant Worksheet History - Addendum C
Schools Currently or Previously Operated by Management Company

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August 2015

ESP			Indicate final membership as reported in February survey (Survey 3) and percentage of students eligible for Free/Reduced Lunch	Indicate school grade issued pursuant to s. 1008.34, F.S., or School Improvement Rating issued pursuant to s. 1008.341, F.S. Authorizers may find more detailed academic performance data at http://schoolgrades.fldoe.org/ .	Unassigned fund balance from independent annual audit. Deficit fund balances should be reported in parentheses. For example, an unassigned fund balance deficit should be reported as (\$25,000).	Indicate the unassigned fund balance as a percentage of total revenue. (Unassigned fund balance divided by total revenue)	Indicate whether the independent financial audit included any of the following findings: financial emergency condition pursuant to s. 218.503(1), deteriorating financial condition, or going concern. If response is "Yes," please attach separate page explaining why. If audit is not yet available, indicate with N/A. Authorizer may review complete audits at
			Year -2018				
District	School Name	MSID	Enrollment /FRL%	School Grade/School Improvement Rating	Year End Fund Balance	Unassigned Fund Balance as Percentage of Total Revenue	Audit Finding (Yes/No)
Orange	Pinecrest Creek Academy	48-0203	110/93.0%	C	\$ 84,084.00	6%	Yes
Orange	Pinecrest Academy Avalon	48-0238	NA	NA	NA	NA	NA
Orange	Pinecrest Collegiate Academy Middle High School Charter	48-0283	NA	NA	NA	NA	NA
Duval	Somerset Academy (Eagle Campus)	16-1251	99/84.8%	B	\$ 295,924.00	22%	No
Duval	Somerset Academy Charter Middle School (Eagle Campus)	16-1261	146/91.1%	C	\$ 167,588.00	12%	No
Duval	Somerset Preparatory Academy	16-5501	265/85.7%	F	\$ 639,686.00	23%	Yes
Palm Beach	Ben Gamla Charter School Palm Beach	50-3941	255/28.6%	A	\$ 256,947.00	12%	No
Palm Beach	Somerset Academy Boca	50-3413	352/28.4%	A	\$ 1,409,094.00	49%	No
Palm Beach	Somerset Academy Boca Middle	50-4041	63/42.9%	A	\$ 309,381.00	65%	No
Palm Beach	Somerset Academy Canyons Middle School	50-4012	875/36.1%	A	\$ 2,189,576.00	33%	Yes
Palm Beach	Somerset Academy Canyons High School	50-4013	736/10.1%	C	\$ 1,823,375.00	31%	No
Palm Beach	Somerset Academy Lakes Charter School	50-4091	178.87.1%	D	\$ 137,669.00	8%	No
Palm Beach	Somerset Academy JFK Charter School	50-3395	520/14.8%	B	\$ 208,994.00	5%	No
Palm Beach	Somerset Academy Wellington	50-4031	NA	NA	NA	NA	NA
Palm Beach	SLAM Palm Beach Charter Middle School	50-4090	17/86.1%	C	\$ 38,922.00	3%	No
Palm Beach	SLAM Boca	50-4103	NA	NA	NA	NA	NA
Palm Beach	SLAM High School Palm Beach	50-4111	NA	NA	NA	NA	NA
Palm Beach	University Preparatory Academy Palm Beach	50-4080	257/91.1%	C	\$ 67,398.00	3%	Yes
St. Lucie	Somerset College Preparatory Academy	56-0712	685/47.5%	A	\$ 202,111.00	4%	No
St. Lucie	Somerset Academy St. Lucie	56-0703	354/63.6%	C	\$ 159,960.00	5%	No
St. Lucie	Somerset Academy Bethany	56-0731	NA	NA	NA	NA	NA
Monroe	Somerset Academy Island Preparatory	44-0382	71/40.8%	I	\$ 395,064.00	48%	No
Osceola	Mater Brighton Lakes	49-0163	1039/63.8%	C	\$ 392,203.00	5%	Yes
Osceola	The Mater Academy Preparatory High School	49-0971	NA	NA	NA	NA	NA
Osceola	Mater Palms Academy	49-0185	251/67.7%	C	\$ 81,267.00	3%	Yes
Osceola	Mater Academy St. Cloud	49-0202	NA	NA	NA	NA	NA
Osceola	SLAM Osceola	49-0183	NA	NA	NA	NA	NA
Lake	Pinecrest Lakes Academy	35-9041	419/22.7%	A	\$ 54,134.00	2%	Yes
Lake	Pinecrest Lakes Middle/High Academy	35-9061	NA	NA	NA	NA	NA
Lake	Pinecrest Academy Four Corners	35-9027	NA	NA	NA	NA	NA
Lake	Pinecrest Academy Tavares	35-9039	NA	NA	NA	NA	NA
Hillsborough	Sports Leadership and Management Academy Tampa	29-7815	371/69%	C	\$ 53,151.00	2%	Yes
Hillsborough	SLAM Academy Tampa Elementary	29-7824	NA	NA	NA	NA	NA
Hillsborough	SLAM Academy at Apollo Beach	29-7825	NA	NA	NA	NA	NA
Brevard	Pinecrest Academy Space Coast	05-6558	NA	NA	NA	NA	NA
Pasco	Pinecrest Academy Wesley Chapel	51-4332	NA	NA	NA	NA	NA
Jefferson	Jefferson County Elementary A Somerset School	33-0111	368/89.5%	C	\$ 1,000,394.00	15%	Yes
Jefferson	Jefferson County Middle A Somerset School	33-0021	166/82.5%	C	\$ 148,355.00	6%	No
Jefferson	Jefferson County High A Somerset School	33-0024	187/79.1%	B	\$ 191,304.00	6%	No
Dade	Excelsior Language Academy of Hialeah	13-5029	NA	NA	NA	NA	NA
Dade	Excelsior Academy High School	13-7054	NA	NA	NA	NA	NA
Brevard	Odyssey Charter School	05-6507	NA	NA	NA	NA	NA
Brevard	Palm Bay Community Charter	05-6519	NA	NA	NA	NA	NA
Brevard	Palm Bay Municipal Charter High School	05-6520	NA	NA	NA	NA	NA
Pinellas	Ben Gamla Charter School	52-7321	NA	NA	NA	NA	NA
Monroe	Key West Montessori Charter School	44-0351	NA	NA	NA	NA	NA
Palm Beach	Bright Futures Academy	50-3385	271/72.3%	I	\$ 89,684.00	4%	Yes

Appendix L: 26.1. Attach an outline of the proposed charter school contract with the State Board.

Included below

- Draft charter contract

**Iowa Department of Education
Charter Contract**

THIS CHARTER entered into as of the ____ day
of _____, 20____ by and between

THE IOWA DEPARTMENT OF EDUCATION

And

Entity Name

DBA

School Name

School Address

a non-profit organization

Definitions

Definitions: The following terms shall have the following meanings herein unless the context clearly requires otherwise:

Application shall mean the School's application for a Charter (including amendments) as submitted to and approved by the Sponsor.

Governing Board shall mean the governing board or body of the School.

Charter shall mean this Charter entered into between the School and the Sponsor.

IDOE shall mean the Iowa Department of Education.

High-Stakes Review shall mean an in-depth sponsor review of important charter school performance data utilizing the agreed upon goals and objectives referenced in this Charter. This review differs from routine annual reports in terms of depth and comprehensiveness of the data reviewed.

School shall mean _____

Sponsor shall mean the Iowa Department of Education.

State shall mean the State of Iowa.

Superintendent shall mean the superintendent of schools for the Sponsor

Section 1

- A. Application is Approved. The Application as approved by the Sponsor is incorporated into and is part of this Charter. A copy of the Application is attached hereto as Appendix 1. In the event of any conflict between the Application and any other provision of this Charter, the Charter provision shall control. In the event of any conflict between the provisions of this Charter and the Application and Iowa Code, Iowa Code shall control.
- B. Term of Charter.
 - 1. Effective Date. This Charter shall become effective on the date it is approved by the both parties.
 - 2. Term. The term of this Charter shall be 5 years commencing on July 1, 20XX and ending on June 30, 20XX unless terminated sooner as provided herein, or extended pursuant to Section 1.B.2., herein. The term shall be automatically extended on a month-to-month basis until the Charter has been renewed, non-renewed, or terminated by the Sponsor. If the parties cannot reach agreement on the terms of a new contract, either party may request mediation from

the IDOE, pursuant to IDOE rules. If the Commissioner of Education determines that the dispute cannot be settled through mediation, the dispute may be appealed to an administrative law judge appointed by the Division of Administrative Hearings. The administrative law judge has final order authority to rule on the dispute, including whether proposed provisions of the Charter violate the intended flexibility granted charter schools by statute. The administrative law judge shall award the prevailing party reasonable attorney fees and costs incurred during the mediation process, administrative proceeding, and any appeals, to be paid by the party against whom the administrative law judge rules.

3. Charter Modification. This Charter may be modified during its initial term or any renewal term only upon approval of both parties. No such modification shall be enforceable unless it is in writing and approved by both the Governing Board and the Sponsor. If the modification involves changes to the grade levels, except as provided by law for high-performing charter schools, the School must provide information acceptable to the Sponsor relating to operational capacity, curriculum, budget, facilities, and staff.
4. Charter Renewal. This Charter may be renewed as provided for by law. No later than September 15th in the final academic year of the term of this charter, a Sponsor shall provide notice to the School regarding the process and timeline for completing the programmatic review required Iowa law. Upon completion of the programmatic review, but no later than 90 days prior to the end of the charter term, the Sponsor shall notify the governing board of the Charter School in writing of the proposed action to renew, terminate, or non-renew the charter.
5. Periodic Review and Evaluation. The Sponsor shall annually evaluate the Charter School on its performance and progress toward meeting the standards and targets included in this Charter, including academic achievement goals. If the term of this Charter exceeds five years, the Sponsor shall conduct a High-Stakes Review at least every five years and shall present the findings of the review to the Governing Board of the School. The Sponsor's evaluation of the School shall not compromise individual student privacy and shall include, but not be limited to, the following performance provisions:
 - a. Student academic growth and proficiency in English language arts on statewide outcome assessments.
 - b. Student academic growth and proficiency in mathematics on statewide outcome assessments.
 - c. Achievement gaps in both proficiency and growth on statewide outcome assessments between specified populations or groups of students, including groups based on gender, race, poverty, special education status, limited English proficiency, and gifted status.
 - d. Benchmark status on early literacy approved screening measure(s) in grades kindergarten through three.
 - e. Attendance.
 - f. Conditions for learning data (as required by Iowa's state plan under the Every Student Succeeds Act).

- g. Enrollment attrition and mobility.
- h. Postsecondary readiness for students in grades nine through 12.
- i. Goals specified in the charter school's mission.
- j. Financial performance and sustainability.
- k. Governing board performance and stewardship, including compliance with all applicable laws, regulations, and terms of the charter contract.

C. Education Program and Curriculum

- 1. Any material change to the education program or curriculum as described in the approved Application or Charter requires Sponsor approval.
- 2. The School agrees to implement its educational and related programs as specified in the Application unless otherwise modified by this Charter.
- 3. The School shall make reading a primary focus of the curriculum and provide sufficient resources to identify and provide specialized instruction for students who are reading below grade level. The reading curriculum and instructional strategies shall be grounded in scientifically-based reading research.
- 4. The School shall adopt the District's plan for English Language Learners, or implement an alternate District approved plan. If applicable, the School's plan for English Language Learners is attached hereto as Appendix 3. The plan must include sufficient information and detail to allow the Sponsor to determine legal sufficiency.
- 5. The School will establish the current incoming baseline standard of student academic achievement, the outcomes to be achieved, and the method of measurement that will be used, as described in the approved Application or otherwise described in this Charter.

D. Renewal, Non-Renewal, or Termination

- 1. Non-Renewal/Termination of this Charter. The Sponsor shall make student academic achievement for all students the most important factor when determining whether to renew or terminate this Charter. The Sponsor may choose not to renew or terminate this Charter if it finds that any of the following grounds below exist by clear and convincing evidence, which is not cured after notice and reasonable opportunity to cure, except for deficiencies regarding immediate threats to student and staff health, safety and welfare.
 - i. Failure to participate in Iowa's education accountability system or failure to meet the requirements for student performance established pursuant to this Charter.

- ii. Failure to meet generally accepted standards of fiscal management
 - iii. Material violation of law.
- 2. The Sponsor shall notify the Governing Board in writing at least ninety days prior to renewing, non-renewing, or terminating this Charter, following the procedures set forth in Iowa Code.
 - i. If the Sponsor issues a notice of non-renewal or termination, the notice shall state in reasonable detail the grounds for the proposed action and stipulate that the Governing Board may, within 14 calendar days of receipt of the notice, request a hearing.
 - ii. A request for a hearing must be authorized by a vote of the Governing Board and be submitted pursuant to the Notice provisions of this Charter.
- 3. If the School elects to terminate or non-renew the Charter, it shall provide reasonable prior notice of the election to the Sponsor indicating the final date of operation as voted by the Governing Board at a publicly noticed meeting. A board resolution signed by the School's Governing Board chair and secretary, indicating support of this action, shall accompany the written notification provided to the Sponsor. The School agrees that such notification shall be considered a voluntary termination by the Governing Board and a waiver of its right to a hearing or appeal.
- 4. Upon notice of termination or non-renewal the School shall not remove any public property from the premises without written Sponsor approval.

E. Post Termination Provisions

- 1. If this Charter is not renewed or is terminated, the School shall be responsible for all the debts of the School. Sponsor shall not assume the debt from any contract for services including lease or rental agreements, made between the School and a third party, except for a debt previously detailed and agreed upon, in writing, by both the Sponsor and the Governing Board and that may not reasonably be assumed to have been satisfied by the Sponsor.
- 2. In the event of termination or non-renewal of this Charter, any and all leases existing between the Sponsor and the School shall be automatically cancelled, unless the lease provides otherwise. In no event shall the Sponsor be responsible under any assignment of a lease for any debts or obligations of the School incurred prior to such assignment.
- 3. In the event of termination or non-renewal, any students enrolled at the School may be enrolled at their home District school, or any other school, consistent with the Sponsor's student transfer procedures including transfer of all student records to the

receiving school. All sponsor property and improvements, furnishings, and equipment purchased with public funds shall automatically revert to full ownership by the Sponsor, subject to complete satisfaction of any lawful liens or encumbrances. Any unencumbered public funds from the School, property and improvements of the Sponsor, furnishings, and equipment purchased with public funds, or financial or other records pertaining to the School, in the possession of any person, entity, or holding company, other than the School, shall be held in trust upon the Sponsor's request, until any appeal is resolved. If the School's accounting records fail to clearly establish whether a particular asset was purchased with public funds, then it shall be presumed public funds were utilized and ownership of the asset shall automatically revert to the Sponsor.

4. Final Audit: Upon notice of non-renewal, closure, or termination, an independent audit shall be completed within 30 days to account for all public funds and assets. During the fiscal year in which the termination or non-renewal occurs, the Sponsor may withhold from the School's public funds, without penalty or interest, an amount necessary to cover the costs for a final financial audit of the School. The audit shall be conducted by an independent certified public accountant.

F. General Statutory Requirements

A charter school established under Iowa Code, Chapter 256E is exempt from all state statutes and rules and any local rule, regulation, or policy, applicable to a noncharter school, except that the charter school shall do all of the following:

1. The School shall meet all applicable federal, state, and local health and safety requirements and laws prohibiting discrimination on the basis of race, creed, color, sex, sexual orientation, gender identity, national origin, religion, ancestry, or disability.
2. The School shall not discriminate in educational programs/activities or employment and shall provide equal opportunity for all as required by all applicable Federal, State and local law, rule regulation and court order.
3. The School shall operate as a nonsectarian, nonreligious school.
4. The School shall be free of tuition and application fees to Iowa resident students between the ages of five and twenty-one years.
5. The School shall be subject to and comply with Iowa Code chapters 216 and 216A relating to civil and human rights.
6. The School shall provide special education services in accordance with Iowa Code chapter 256B.
7. Be subject to the same financial audits, audit procedures, and audit requirements as a school district. The audit shall be consistent with the requirements of sections 11.6, 11.14, 11.19, and 279.29, and section 256.9, subsection 20, except to the extent deviations are necessary because of the program at the school. The department, the auditor of state, or the legislative services agency may conduct financial, program, or compliance audits
8. The School shall be subject to and comply with the requirements of section 256.7, subsection 21, and the educational standards of section 256.11, unless specifically waived by the state board during the application process.
9. The School shall provide instruction for at least the number of days or hours required by section 279.10, subsection 1, unless specifically waived by the state board as part

- of the application process.
10. The School shall be subject to and comply with section 279.76 relating to physical examinations and health screenings in the same manner as a school district. j. Comply with the requirements of this chapter.
 11. Additionally, the School shall comply with those statutes that specifically apply to charter schools as set forth in Iowa Code generally, and other applicable State laws. The School agrees that it will abide by all Federal and State laws, statutes, rules, and regulations applicable to charter schools and also abide by the terms and conditions of the Charter.

Section 2: Academic Accountability

Student academic achievement for all students shall be the most important factor when considering whether to renew, non-renew, or terminate this charter.

A. Annual Objectives

1. By September 15 of each year the Sponsor shall provide the School with academic student performance data on state required assessments for each student attending the School that was enrolled the prior year in another public school. The Sponsor may fulfill this requirement by providing the School access to the data.
2. By September 15 of each year the Sponsor shall provide the School the rates of academic progress for the prior year for comparable student populations in the District. The data shall include proficiency and growth on state assessments for English Language Arts and Mathematics by grade groupings.
3. By October 15 of the first year of this Charter, the School shall provide its proposed academic achievement goals for the remaining years of the Charter to the Sponsor. The academic achievement goals shall include, at a minimum, growth and proficiency on state assessments, and may include performance on additional assessments included in the approved Application. If the School will not serve students in grades that participate in the statewide assessments the academic achievement goals shall be based on the assessments included in the approved application, and at least one assessment administered in traditional public schools in the District.
4. By October 15 of the second year of the School's operation, the School shall provide its proposed academic achievement goals for the remaining years of the Charter, up to a maximum of four years or the end of the current Charter term, whichever occurs first, using the same parameters and testing set forth in Section 2.A.3, above. Schools that have contracts in excess of five years shall resubmit proposed academic achievement goals every four years pursuant to the process described in this paragraph.
5. Annually, the School shall report its performance against the academic goals. If the School falls short of the academic achievement goals set forth under the provisions

of this Charter the Sponsor shall report such shortcomings to the School's Governing Board.

2. The School may propose adjustments to the goals through the same process set forth in Section 2.A., above. The goals may be adjusted at any time by the School and resubmitted to the Sponsor.
3. Methods of Measurement: The methods used to identify the educational strengths and needs of students are set forth in the approved Application.

B. Assessments

1. State required assessments: All students at the School will participate in all State assessment programs and assessments required by law. The School shall facilitate required alternate assessments and comply with state reporting procedures.
2. Additional Assessments: Students may participate in any or all District assessment programs in which District students in comparable grades or schools participate and shall participate in any other assessments as described in the Application. The School shall be responsible for the costs of District assessments that are not required by law or this Charter, except those developed with federal funds.
3. If an IEP, 504 Plan or an EP for a student indicates accommodations or an alternate assessment for participation in a State assessment, or District assessment, as applicable, the School will facilitate the accommodations or alternate assessment and comply with State reporting procedures.
4. All School personnel involved with any aspect of the testing process must abide by State policies, procedures, and standards regarding test administration, test security, test audits, and reporting of test results. The Sponsor shall invite the School staff to District offered training related to State assessment administration and, as applicable, District Assessment administration, at no cost to the School. The Sponsor shall provide to the applicable School staff all services or support activities that are routinely provided to the Sponsor's staff regarding implementation of District and State-required assessment activities. The School shall designate a testing coordinator and shall be responsible for proper test administration. The School shall permit the Sponsor to monitor or proctor all aspects of the School's test administration, if the Sponsor deems it necessary.
5. The Sponsor shall provide the School with reports on District and State assessments in the same manner and at the same time as for all public schools in the District.
6. The School shall, at its expense, provide adequate technological infrastructure to support all required online test administration.

C. Student Promotion and Graduation: The School's student promotion policy shall be

consistent with the provisions of the Application and applicable law. The School **will** adopt the Sponsor's student progression plan.

The School's policy for determining that a student has satisfied the requirements for graduation shall be consistent with the provisions of the Application, and applicable law.

Schools that serve students in grade 12 shall annually notify parents in writing the accreditation status of the school and the implications of non-accreditation, if applicable. The notification may be provided in the parent handbook.

D. Data Access and Use Pursuant to Statute

The School agrees to allow the Sponsor reasonable access to review its data sources in order to assist the Sponsor in making a valid determination about the degree to which student performance requirements, as stated in this Charter, have been met.

Section 3: Students

A. The School is authorized to serve students in grades ____ through ____.

The School may provide enrollment preferences as approved in the Application. Further, the School may limit the enrollment process to target specific student populations as described in the approved Application.

The School will accept all eligible students in accordance with federal and state anti-discrimination laws. The School will not discriminate on the basis of race, gender, ethnicity, religion, national or ethnic origin or disability in the admission of students. The School may not request prior to enrollment, through the application or otherwise, information regarding the student's prior academic performance.

The School shall be non-sectarian in its programs, admissions policies, employment practices and operations. The School will meet all applicable state and local health, safety, and civil rights requirements.

The School will decide on an annual basis whether it will participate in its Sponsor's plan for the mental health assistance allocation. If the School develops its own plan, it must submit that plan to its governing board for approval. After the plan is approved by the governing board, it must be provided to the School's Sponsor.

B. The School shall make reasonable efforts, in accordance with federal law, to achieve a racial or ethnic balance reflective of the community it serves or within the racial or ethnic range of other public schools in the District and shall not discriminate against students with disabilities who are served in Exceptional Student Education programs (ESE) and

students who are served as English Language Learners (ELL).

If the District is operating under a federal order or other resolution or settlement agreement, the School shall comply with those requirements applicable to charter schools that are not considered a local education agency (LEA). The School is not required to comply with federal requirements applicable to charter schools also considered to be an LEA.

C. Recruitment

The School may recruit throughout all segments of the community. Recruiting may include direct mailings, public advertisement utilizing the local and community press and informational meetings at a variety of locations using both English and other languages where appropriate.

D. Eligible Students

1. Each year, the School agrees to enroll an eligible student by accepting a timely application through deadlines as determined by the Governing Board and publicly advertised. If the target goal of students is not met by the deadline, and the School wishes to extend, the School will give sufficient public notice and extend the application deadline for a set time as determined and publicized by the Governing Board. If, at the 10 day count, the registered enrollment as reflected in the Sponsor's data system is less than 75% of the School's total projected enrollment as provided for under the provisions of Section 3.F. of this Charter, the School shall, upon request by the Sponsor, submit a revised budget within 30 days taking into account the reduced enrollment
2. If the number of applications exceeds the capacity of the program, class, grade level, or building, all applicants shall have an equal chance of being admitted through a random selection process. The School may give preference in admission to students or limit the enrollment as provided for in the approved application. The School shall clearly indicate in its Policies and Procedures the lottery procedures and enrollment preferences the School will utilize.
3. Enrollment is subject to compliance with the provisions applicable law concerning school entry health examinations and immunizations.
4. If this Charter is not renewed or is terminated, a student who attended the School may be enrolled in another public school pursuant to Sponsor policies.
5. A student may withdraw from the School at any time and enroll in another public school, as determined by Sponsor policy. The School shall work in conjunction with the parent(s) and the receiving school to ensure that such transfers minimize impact on the student's grades and academic achievement.

E. Class Size

The School shall be in compliance with Class Size Requirements, as applicable to charter schools.

F. Annual Enrollment

1. Projected Enrollment: The School shall provide to the Sponsor on an annual basis the School's Projected Enrollment for the following school year. The Projected Enrollment shall not constitute a cap on the School's enrollment for the following school year.
2. Annual Enrollment Capacity: Annual Enrollment Capacity shall be annually determined by the Governing Board. The School shall provide to the Sponsor on an annual basis, the proposed Annual Enrollment Capacity for the subsequent school year. The School shall not enroll students in excess of the physical capacity of the building.

G. Maintenance of Student Records as Required by Statute

1. The School shall maintain confidentiality of student records as required by federal and state law.
2. The School will maintain active records for current students in accordance with applicable law and State Board of Education rules.
3. All permanent (Category A) records of students leaving the School, whether by graduation, transfer to another public school, or withdrawal to attend another school, will be immediately transferred to the District in accordance with law. Records will be transmitted to the District's records retention department.
4. Records of student progress (Category B) will be transferred to the appropriate school if a student withdraws to attend another public school or any other school. The School may retain copies of the departing student's academic records created during the student's attendance at the School.
5. Upon the withdrawal of a student from the School, the School will retain the student's original records, except that such records will be immediately transferred to another District school when requested by that school. Requests for student records from public or private schools outside of the County and private schools within the County must be made in writing. Copies only of student records may be provided to parents upon their request unless the student is considered an eligible student under FERPA. All inactive student records will be returned to the Sponsor's records retention department.

6. Upon termination or closure of the School, all student education records and administrative records shall be transferred immediately to the Sponsor's records retention office for processing and maintenance.
 7. The School will comply with all other public record retention requirements for non-student related records in a manner consistent with applicable law. The School shall comply with all other applicable statutes pertaining to public records.
 8. The Sponsor will ensure that all student records will be provided immediately to the School upon request and upon enrollment of students in the School from a District school. Records must be maintained in accordance with applicable record retention laws.
- H. Exceptional students shall be provided with programs implemented in accordance with applicable Federal, state and local policies and procedures; and, specifically, the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973. This includes, but is not limited to:
1. A non-discriminatory policy regarding placement, assessment, identification, and selection.
 2. Free appropriate public education (FAPE).
 3. Individual Educational Plans (IEP's), to include an annual IEP meeting with the student's family.

Students with disabilities will be educated in the least restrictive environment, and will be segregated only if the nature and severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

Those students, whose needs cannot be adequately addressed at the School, as determined by the IEP team, will be referred to an appropriate placement within the District. Parents of students with disabilities will be afforded procedural safeguards in their native language, consistent with the manner that those safeguards are provided in the Sponsor's traditional schools or using the Sponsor's materials. Unless the School is specifically for students with disabilities, the School shall not request through the School's application a student's IEP or other information regarding a student's special needs, nor shall the School access such information prior to the enrollment lottery.

Upon enrollment, or notice of acceptance sent to the student, the School may request from the Sponsor information related to the student's program and needs, including the student's most recent IEP, which shall be provided within 10 days. If the School believes, upon review of the IEP, that the student's needs cannot be met at the School an IEP meeting shall be convened within 30 days. The Sponsor shall be invited to and may attend the meeting, at which time the IEP team shall determine whether the School

is an appropriate placement for the student.

A representative of the Sponsor shall be invited to participate in all IEP meetings and will serve as the LEA representative. The Sponsor retains the right to determine whether or not to send a representative to such meetings. However, if no representative of the Sponsor will attend an IEP meeting, the Sponsor must designate which individual or employment position at the School will serve as LEA representative and must provide such individual with training required to serve as LEA representative.

4. Due Process Hearing:

i. A student, parent, or guardian who indicates at an IEP, EP, or 504 meeting that they wish to file for a due process hearing or State Complaint pursuant to State law and rules shall be given the appropriate forms by the School. These forms shall also be provided upon request at any other time.

ii. Due process hearing requests shall be forwarded to the Sponsor's ESE Director and the Sponsor's General Counsel within one (1) school day of receipt.

iii. The Sponsor will select and assign an attorney in consultation with the School. The School may also hire an attorney at its cost to consult and cooperate with the Sponsor. Final decisions on legal strategies shall be made by the Sponsor's attorney in consultation with the School.

iv. In cooperation with the assigned attorney, the School is responsible for scheduling resolution and mediation meetings as required under State and Federal law.

v. The Sponsor shall ensure that:

- (a) The due process hearing is conducted pursuant to applicable State laws and rules;
- (b) A final decision is reached; and
- (c) A copy of the decision is mailed to the parties.

vi. The School shall bear all the costs associated with the administrative due process hearing, legal representation, discovery, court reporter, and interpreter. In the event that the student, parents, or guardians prevail, either through a hearing or settlement, the School shall pay any and all attorneys' fees, reimbursements, compensatory education and any other costs incurred, agreed upon or awarded; however, the Sponsor shall assume or reimburse the costs of the defense attributable to, caused by or through the fault of the Sponsor, if any. Costs and fees incurred will be automatically reduced from the FTE funds passed through the Sponsor to the School, without any penalty of interest, although the School may request and the parties agree to a payment plan.

If the School receives a complaint filed or becomes aware of an investigation with the Office of Civil Rights or any other governmental entity and the complaint or investigation

relates to the School and could involve the Sponsor, the School shall within one (1) school day notify the Sponsor and provide the Sponsor any documentation the School received from the agency. The School shall fully cooperate with the Sponsor during the investigation and proceeding and provide the Sponsor any relevant information, subject to the School's claims of privilege or confidentiality. The School shall bear all costs associated with the investigation. However, the Sponsor shall assume or reimburse the costs attributable to, caused by, or through the fault of the Sponsor, if any.

- I. English for Speakers of Other Languages: Students at the School who are English Language Learners will be served by English to Speakers of Other Languages (ESOL) certified personnel who will follow the Sponsor's Plan for English Language Learners (ELLs) or an alternate plan that has been approved by the Sponsor. The School shall be invited to attend the Sponsor's ESOL Procedures Training(s) and shall comply with applicable rules and regulations.

- J. Dismissal Policies and Procedures

Upon the School's decision to implement dismissal, the School shall refer the student to the Sponsor for appropriate placement with the District. In each instance where dismissal is initiated, the parents will receive written notice of the dismissal including the reasons for dismissal and a summary of the actions taken to assist the student prior to dismissal. The District shall be provided a copy of the dismissal notice on the same day as the parent. The School shall work in conjunction with the parent(s) and the receiving school to assure that, to the greatest extent possible, such dismissals occur at logical transition points in the school year (e.g. grading periods or semester breaks) that minimize impact on the student grades and academic achievement.

The School may withdraw a student involuntarily for failure to maintain eligibility, such as District residency requirements, or for material violation of the School's Student Conduct Code, which must also be compliant with IDEA, Section 504 of the Rehabilitation Act, and the American with Disabilities Act (ADA) for student with disabilities.

- K. Student Code of Conduct, Suspension and Expulsion

The School will maintain a safe learning environment at all times. The School shall adopt a Code of Student Conduct as described in the approved Application. The School will report each month to the Sponsor the number of violations of the Code, by offense, to be included in the Sponsor's discipline reporting, as required by law. The School agrees that it will not engage in the corporal punishment of students. Students recommended for expulsion or placement in an alternative school will be referred to the Sponsor for appropriate disposition. If the student remains enrolled at the School while placed at an alternative school, costs for the alternative school charged to the School, if any, will not exceed the Sponsor's actual cost for such student unless mutually agreed to by the School and Sponsor in a contract negotiated separately from the Charter. Students with disabilities shall be afforded a manifestation determination if required by the Individuals with

Disabilities Education Act.

L. School or Parent Contract

The School agrees to submit any proposed Parent Contracts, including amendments, to the Sponsor for review by March 1 annually. The Sponsor shall approve the proposed Parent Contract or reject it if it does not comply with applicable law, within 30 days of receipt. If the Sponsor rejects the proposed Parent Contract, then the Sponsor shall provide the School its reasons for rejection in writing, detailing the legal insufficiency, and shall allow the School to resubmit a revised draft. If the School or Sponsor elects to resolve any dispute through the dispute resolution procedures, then the deadline for approving the Parent Contract will be extended through the conclusion of that dispute resolution process. The School may not accept monetary donations in lieu of volunteer hours.

Section 4: Financial Accountability

A. Revenue: State and Local

1. Basis for Funding: Student Reporting

- i. School will report the daily attendance of each student to the Sponsor to meet attendance reporting requirements, as required by law.
- ii. The School agrees to report its student enrollment to the Sponsor as provided by law at the agreed upon intervals and using the method used by the Sponsor when recording and reporting cost data by program. The Sponsor shall include the School's enrollment when recording and reporting cost data by program. The Sponsor shall include the School's enrollment in the Sponsor's report of student enrollment. The School shall use the Sponsor's electronic data processing software system and procedures for the processing of student enrollment, attendance, FTE collection, assessment information, IEP's, ELL plans, 504 plans, and any other required individual student plan. The Sponsor will offer training to the School, and invite the School to any subsequent training for District staff, in the use of such system and procedures at no cost to the School. A representative of the School shall attend such training. The Sponsor shall provide the School with equal access to the Sponsor's student information systems that are used by traditional public schools in the District.
- iii. If the School submits data relevant to FTE, Federal, or grant funding that is later determined through the audit procedure to be inaccurate, the School shall be responsible for any reimbursement to the State, the United States Department of Education or the Sponsor for any errors or omissions in data that the School submitted provided that the Sponsor has timely sent notice to the School of alleged errors discovered through such audit(s) so that the School, on its own, or through the Sponsor, at the School's expense may participate in any proceedings to challenge or appeal such audit findings. After final disposition

of any appeals, the Sponsor shall deduct any such adjustments from the School's subsequent revenue disbursements evenly over the remaining months of the fiscal year or according to an agreed upon payment plan.

- iv. If the School's students or programs meet the eligibility criteria in law, the School shall be entitled to its proportionate share of categorical program funds included in the total funds available in the FEFP by the Legislature, including transportation, and the research-based reading allocation.

2. Distribution of Funds Schedule

- i. The Sponsor shall calculate and submit twelve (12) monthly or twenty- four bi-monthly payments to the account specified by the School. Each payment will be one-twelfth (1/12) or one twenty-fourth (1/24) of the funds described in Section 4.A.1., above, less the administrative fee set forth in Section 4.A.3, above. The first payment will be made by July 15 of the School's first year of operation. Subsequent payments will be made no later than the 15th of each month beginning with August 15.
- ii. For each year of the Charter, monthly payments will be calculated as follows:
 - a. July through October payment shall be based on the School's Final Projected Enrollment as determined under the provisions of Section 3.F. of this Charter, if a minimum of 75 percent of the Final Projected Enrollment is entered into the Sponsor's Student Information System by the first day of the current month. Otherwise, or if the School's enrollment exceeds its Projected Enrollment, the Sponsor shall fund the School based on the number of students actually registered as of the first day of the month.
 - b. Thereafter, the results of full-time equivalent student membership surveys shall be used in adjusting the amount of funds distributed monthly to the School for the remainder of the fiscal year.
 - c. Payments will be adjusted retroactively for prior period adjustments.
- iii. Payment shall not be made, without penalty of interest, for students in excess of the School facility's valid capacity as determined by the School's Certificate of Occupancy, Certificate of Use, or Fire Permit or in excess of the Annual Enrollment Capacity for the school year (whichever is less). In the event that the required county or municipality facility permits do not indicate a facility capacity, the School must submit a letter from the architect of record certifying the capacity of the facility.

- iv. The Sponsor may withhold monthly payments, without penalty of interest, if the School's Certificate of Occupancy, Certificate of Use, or Fire Permit has expired or has otherwise become invalid. The School shall notify the Sponsor immediately if any of the aforementioned documents has expired or become invalid. The Sponsor shall release, in full, all funds withheld under this provision when the School has cured the deficiency. Payments will not be withheld pending receipt of the School's Certificate of Occupancy, Certificate of Use or Fire Permit for its initial location or any subsequent location, so long as the School has met applicable statutory deadlines for obtaining such approvals.

Additionally, funding for the School shall be adjusted during the year as follows:

- a. In the event of a state holdback or a proration, which reduces District funding, the School's funding will be reduced proportionately to the extent required by law.
 - b. In the event that the District exceeds the state cap for WFTE for Group 2 programs established by the Legislature resulting in unfunded WFTE for the District, then the School's funding shall be reduced to reflect its proportional share of any unfunded WFTE.
- v. The Sponsor shall make every effort to ensure that the School receives timely and efficient reimbursement of funds. Other than those payments provided for in this Charter, for which other requirements for timely payments have been made, the payment shall be issued no later than ten (10) working days after the Sponsor receives a distribution of state or federal funds. If a warrant for payment is not issued within ten (10) working days after the receipt of funding by the Sponsor, or the due date set forth in this Charter, the Sponsor shall pay to the School, in addition to the amount of the scheduled disbursement, interest at a rate of one percent (1%) per month calculated on a daily basis on the unpaid balance from the expiration of the ten (10) day period until such time as the warrant is issued.

Payment shall be made to the account in a state-approved depository specified and approved by the Governing Board at a public meeting.

B. Federal Funding

Sponsor shall include the School in all requests for federal funds for which the School, or its students, is eligible, including without limitations, Title I, Title II, and IDEA funds. The

Sponsor will provide copies of federal fund grant requests to the School no later than the date they are submitted to FDOE or a federal agency, as applicable.

Unless otherwise mutually agreed to by the School and Sponsor, and consistent with state and federal rules and regulations governing the use and disbursement of federal funds, the Sponsor shall reimburse the School on a monthly basis for all invoices submitted by the School for federal funds available to the Sponsor for the benefit of the School, the School's students, and the School's students as public students in the District. If the School elects to receive funds in lieu of services, the following provisions apply:

1. The Sponsor shall provide to the School by July 15 of each year, or at other times of the school year if other federal funds become available, a projected annual allocation for all federal funds, as described above, that the School may draw as reimbursement for services provided. The projected annual allocation shall be based upon the School's Final Projected Enrollment as provided for in 3.F. of this Charter or other data as applicable to the federal funds to be allocated.
2. The School shall provide to the Sponsor a plan that describes how the funds will be used in accordance with applicable federal requirements as required by law. The plan must include sufficient detail to allow review of the plan for compliance with applicable federal regulations. The Sponsor shall have 30 days to review and approve the plan. If the Sponsor deems the plan unacceptable, the Sponsor shall provide the School with written notice detailing the deficiencies and provide an opportunity to cure.
3. The School shall submit invoices by the 15th of each month to receive reimbursement for allowable expenses incurred during the prior month. The School shall maintain documentation of all expenditures in accordance with applicable law and provide to the Sponsor upon request. Expenditures shall be included in required monthly or quarterly financial statements.
4. The Sponsor shall reimburse the School within 30 days of receipt of the invoice. If the Sponsor determines that the invoice is insufficient, it shall provide written notice to the School within ten (10) days of receipt.
5. If the School and Sponsor mutually agree that the School will receive services funded through federal funds in lieu of the funds, such services will be provided to the School in the same manner as such services are provided to school district schools and to the students enrolled at school district schools.
6. The per pupil allocation of Title I funds will be determined annually in accordance with federal and state Title I regulations by the Sponsor for that purpose. The allocation of Title I Funds.
7. Any capital outlay item purchased with Title I must be identified and labeled for Title I property audits. The property must be returned to the Sponsor if the School

is no longer eligible for Title I funding.

8. Should the School receive Title I funds it will employ highly qualified staff: teachers that are certified and teaching infield; Para-educators with two years of college, an AA degree, or that have passed an equivalent exam.
9. If the School accepts Title I funds, the School will receive a separate parent involvement allocation that must be spent in support of parental involvement activities and the School will implement a parent involvement program subject to the provisions of Title I federal law, currently section 1118 of NCLB.
10. The Sponsor and regional Title I staff will provide technical assistance and support in order to ensure that Title I guidelines are being followed at the School and that students are meeting high content and performance standards.
11. Medicaid School Match Program Participation: Under the Medicaid Certified School Match Program, the School may be eligible to seek reimbursement for certain services provided to Medicaid-eligible students who qualify for services under the IDEA part B or C. In order to seek reimbursements, the School shall follow the procedures established by the Agency for Health Care Administration for Medicaid-reimbursable services to eligible students in the School.

C. Federal Grants

The School agrees to comply with the Sponsor's rules, policies and procedures for federal and state Grants Management for grants submitted through the Sponsor, which include, but are not limited to:

1. Working with the appropriate District staff to facilitate Sponsor's approval for all federal and state grant applications developed by the School for which the Sponsor will serve as the fiscal agent.

2. Submitting a grant application executive summary and grant description for each such grant processed, and submitting an annual end-of-the-year Grant Final Report.
3. Ensuring that all grant indirect costs are appropriated, if allowed, to the Sponsor for applicable Federal Grants that are approved, monitored and/or disbursed by the Sponsor. For purposes of the Public Charter School Program Grant, authorized under Title V, Part B, of the Elementary and Secondary Education Act, no indirect costs may be appropriated to the Sponsor unless the School voluntarily agrees to such appropriation.

D. Restriction on Charging Tuition or Fees

The School shall not charge tuition or fees, except those fees allowable by statute that are normally charged by other public schools in the District. If the School intends to charge fees, it shall submit its proposed fee schedule to the Sponsor for review no later than March 1 prior to the School Year in which the fees are intended to be charged, or within 30 days of contract execution for the initial school year. If the Sponsor believes that the proposed fee schedule does not meet the requirements of this subsection or applicable law, it will submit comments to the School and request additional information no later than thirty (30) days following receipt of the proposed fee schedule. If the parties are unable to resolve such issues, the matter will be submitted for alternative dispute resolution as set forth herein and applicable law. Fees shall not be a barrier to enrollment.

E. Budget

1. Annual Budget

The School shall annually prepare an operating budget for the School. The budget shall be formally adopted by the Governing Board at a scheduled public meeting. The adoption of the budget shall be documented in the minutes of the meeting. The School shall provide to the Sponsor a copy of the approved budget and a copy of the minutes of the Governing Board meeting documenting adoption of the budget, no later than August 30, for the fiscal year.

2. Amended Budget

Any amendments to the adopted budget shall be approved by the Governing Board at a scheduled meeting thereof and a copy provided to the Sponsor within 10 business days of the meeting at which the budget was amended.

F. Financial Records, Reports and Monitoring

1. Maintenance of Financial Record

The School shall use the standard state format contained in the Financial and Program Cost Accounting and Reporting for Schools (The Red Book) for all financial transactions and maintenance of financial records.

2. Financial and Program Cost Accounting and Reporting for Schools. The School agrees to do an annual cost accounting in a form and manner consistent with generally accepted governmental accounting standards. The financial statements are to be prepared in accordance with the provisions of applicable law.

3. Financial Reports

- i. Monthly or Quarterly Financial Reports

The School will submit a monthly or quarterly, as applicable, financial statement, to the Sponsor no later than the last day of the month following the month being reported. Financial reports shall be submitted quarterly as provided by law. The monthly or quarterly report will be in the format prescribed by the IDOE.

- ii. Annual Property Inventory

The School will submit annually to the Sponsor a property inventory of all capital assets or additions to capital assets purchased with public funds (including grant funds). This includes land or existing buildings, improvements to grounds, construction of buildings, additions to building, remodeling of buildings, initial equipment, new and replacement equipment, and software. This shall include furniture, fixtures, and equipment. The property inventory shall include the date of purchase, description of the item purchased, the cost of the item, and the item location. The property inventory shall be submitted to the sponsor annually at the same time School's Annual Audit is submitted.

- iii. Program Cost Report

The School agrees to deliver to the Sponsor its annual cost report in a form and manner consistent with generally accepted governmental accounting standard, no later than the last business day in July.

- iv. Annual Financial Audit

The School will annually obtain a financial audit, from a licensed Certified Public Accountant or Auditor, selected pursuant to law. The audit will be performed in accordance with Generally Accepted Auditing Standards; Governing Standards and the Rules of the Auditor General for. The School will provide a copy of its annual financial audit (including any School

responses to audit findings) to the Sponsor no later than September 30.

v. Form 990, if applicable

The School shall organize as, or be operated by, a nonprofit organization. If the School has obtained federal tax exempt status as a 501(c)(3) organization, the School shall provide the Sponsor copies of any correspondence from the Internal Revenue Service (IRS) confirming the School's 501(c)(3) status and will provide to the Sponsor a copy of its annual Form 990 within 15 business days after filing it with the IRS. Notwithstanding anything set forth in this Charter, the Sponsor does not covenant to extend or pledge its own tax-exempt status in any way for the use and benefit of the School.

vi. The School shall provide all required financial documents noted herein in a timely manner consistent with the terms of this Charter.

4. The School's fiscal year shall be July 1 – June 30
5. If the School's annual financial audit reveals a deficit financial position, the auditors are required to notify the School's Governing Board, in writing. The auditor shall report such findings in the form of an exit interview to the principal or the principal administrator of the School and the chair of the Governing Board within seven (7) business days after finding the deficit position.
6. A final annual financial audit report shall be provided to the entire Governing Board, the Sponsor and the IDOE within fourteen (14) business days after the exit interview.

G. Financial Management of School

1. The Governing Board shall be responsible for the operation and fiscal management of the School. The fiscal management of the School shall be conducted in a manner consistent with the provisions of the Application, this Charter, Governing Board Policy, and applicable law.
2. The School shall adhere to any additional applicable financial requirements mandated by State or Federal laws and regulations.
3. Notwithstanding anything else herein to the contrary, the Sponsor shall not
 - i. Guarantee payment for any purchases made by the School;
 - ii. Guarantee payment for any debts incurred by the School;
 - iii. Guarantee payment for any loans taken out by the School.

- iv. Lend its good faith and credit in order for the School to obtain a loan or other forms of credit.

The School shall not suggest or represent to third parties, including, but not limited to, lenders, vendors, creditors, other business entities or their representatives, governmental entities, or other individuals anything to the contrary of the immediately preceding sentences.

- 4. The School agrees to provide to the Sponsor, upon request, proof of sufficient funds or a letter of credit to assure prompt payment of operating expenses associated with the School, including but not limited to, the amount of any lease payments, teacher and other staff salaries and benefits, transportation cost, etc. The parties stipulate that provision of a financially feasible, adopted budget, shall be sufficient for meeting this requirement.

H. Description of Internal Operating Procedures

The School shall develop and implement sufficient internal operating procedures as described in the approved Application to ensure sound financial management.

Section 5: Facilities

- A. The School shall be located at:_____. The School must provide a copy of the lease agreement, use agreement, or ownership documents and certificate of occupancy or temporary certificate of occupancy documenting compliance with all applicable codes prior to the School's opening. The School shall make facilities accessible to Sponsor for safety inspection purposes upon reasonable notice and at times mutually agreeable to the Sponsor and the School in order to minimize disruption to students. A facility for students to utilize during the class day is a material requirement of this Charter. If the facility is sub-leased, the School shall provide, upon request, documentation verifying the owner of the facility has approved the School's use of the facility if such approval is required.

Any proposed change in location or an additional location must be requested in writing to the Sponsor, and any new location must meet the same standards contained herein and applicable law. If the proposed location will not result in a substantial change to the student population or burden to the currently enrolled students and their families and does not alter the school's mission, approval shall not be unreasonably withheld. The School shall not change locations without prior written approval from the Sponsor, Superintendent or Superintendent's designee.

Notwithstanding the aforementioned, in unforeseen circumstances or emergencies, if the facility is damaged or unable to safely house students and staff, the School must notify the Sponsor, immediately, and secure an alternative location to ensure no interruption in instruction. The alternative location shall be subject to all facility requirements indicated in this section and applicable law. If the circumstances result in limited interruption of

instruction the School shall ensure that the required number of instructional hours is provided.

- B. In the event the School is dissolved or is otherwise terminated, all property of the Sponsor and improvements, furnishings, and equipment purchased with public funds shall automatically revert to full ownership by the Sponsor, subject to complete satisfaction of any lawful liens or encumbrances. Any unencumbered public funds from the School, Sponsor property and improvements, furnishings, and equipment purchased with public funds, or financial or other records pertaining to the School, in the possession of any person, entity, or holding company, other than the School, shall be held in trust upon the Sponsor's request, until any appeal status is resolved.
- C. The School shall not display any religious or partisan political symbols, statues or artifacts, on the property and facilities where the School will operate.

Section 6: Transportation

- A. Reasonable Distance [for purposes of this Charter]: The School and Sponsor shall cooperate in making arrangements that ensure that transportation is not a barrier to equal access for all students residing within 2-4 miles distance from the school.
- B. The parties may agree for the Sponsor to provide transportation to and from the School. If such agreement is reached it shall be the subject of a separate contract. If agreement is reached with the Sponsor the School may utilize, at the School's expense, the Sponsor's transportation services for extracurricular events, field trips, and other activities on the same basis and terms as other District schools.
- C. The School shall comply with all applicable transportation safety requirements. Should the School choose to implement its own transportation plan rather than contract with the Sponsor for transportation services, it shall submit a transportation plan to the Sponsor for review and approval. The School shall provide the Sponsor the name of the private transportation provider and a copy of the signed contract no later than 10 business days prior to the use of the service.
- D. If the School submits data relevant to FTE funding for transportation that is later determined through the audit procedure to be inaccurate, the School shall be responsible for any reimbursement to the Sponsor or State arising as a result of any errors or omissions, misrepresentations or inaccurate projections for which the School is responsible provided that the Sponsor has timely sent notice to the School of alleged errors discovered through such audit(s), so that the School, on its own, or through the Sponsor, at the School's expense, may participate in any proceedings to challenge or appeal such audit findings. After final disposition of any appeals, the Sponsor shall deduct such assessed amount from the next available payment otherwise due to the School, without penalty of interest. Any deficit incurred by the School shall be the sole fiscal responsibility of the School and the Sponsor shall have no liability for the same.

Section 7: Food Services

The School shall provide food services to its students consistent with applicable Iowa Code. If the School elects to participate in the National School Lunch Program it shall follow all applicable federal rules and regulations.

Section 8: Insurance & Indemnification

- A. The School agrees to provide the following proof of insurance:
1. Errors and Omissions coverage to include prior acts, sexual harassment, civil rights and employment discrimination, breach of contract, insured versus insured, consultants and independent contractors and with minimum policy limits of \$2,000,000.00. The insurance shall be subject to a maximum deductible not to exceed \$25,000 per claim. If the insurance is on a claims-made basis, the School shall maintain, without interruption, the Professional Liability Insurance until three (3) years after termination of this Charter;
 2. General liability coverage written on an occurrence form with minimum policy limits of \$1,000,000.00 per occurrence and an aggregate limit of \$2,000,000.00;
 3. Business automobile coverage with the same limits as general liability.
- B. Property insurance shall be secured for buildings and contents. Property Insurance coverage for the "Building" includes the structure, including permanently installed fixtures, machinery and equipment, outdoor fixtures, and personal property to service the premises. If the Building is under construction, the School shall provide evidence of property insurance for the additions under construction and alterations, repairs, including materials, equipment, supplies, and temporary structures within 100 feet of the premises. If the School leases the site location, then the School shall provide on a standard commercial form reasonably acceptable to the Sponsor, or a form not materially different from the form currently in use by the School, evidence of business personal property insurance, to include furniture, fixtures, equipment and machinery used in the School.
- C. The School further agrees to secure and maintain property insurance for the School's personal property, and to insure all of the Sponsor owned property, if any, being used by the School to its full fair market value with the Sponsor named as loss payee. The insurance must be sufficient to provide for replacement of property.
- D. The School agrees to provide adequate Workers' Compensation insurance coverage as required by law.
- E. Fidelity Bond and Crime Coverage: The School shall purchase Employees Dishonesty or Crime Insurance for all Governing Board members and employees, including Faithful Performance of duty coverage for the School's administrators and Governing Board with an insurance carrier authorized to do business in the State of Iowa and coverage

shall be in the amount of no less than one million (\$1,000,000) dollars per loss/two million (\$2,000,000) dollars annual aggregate. In lieu of Employee Dishonesty or Crime Insurance, Sponsor is willing to accept Fidelity Bond coverage of equal coverage amount.

- F. No later than 30 days prior to the opening of school, the School shall furnish the District with fully completed certificates of all insurance policies, signed by an authorized representative of the insurer(s) confirming the coverage begins by July 1. The certificates shall be issued to the Sponsor and name the Sponsor as an additional insured. Until such time as the insurance is no longer required to be maintained by the School, the School shall provide the School Board evidence of the renewal or replacement of the insurance no less than thirty (30) days before expiration or termination of the required insurance for which evidence was provided. Should any of the above described policies (A-E) be cancelled before the expiration date, written notice to the Sponsor shall be delivered in accordance with the policy provisions or within 10 days of cancellation, whichever is sooner.
- G. The School agrees to indemnify and hold harmless the Sponsor, its members, officers, employees and agents, harmless from any and all claims, actions, costs, expenses, damages, and liabilities, including reasonable attorney's fees, arising out of, connected with or resulting from: (a) the negligence, intentional wrongful act, misconduct or culpability of the School's members, officers, or employees or other agents in connection with and arising out of any services within the scope of this Charter; (b) the School's material breach of this Charter or applicable law; (c) any failure by the School to pay its suppliers or any subcontractors. In addition, the School shall indemnify, protect and hold the Sponsor harmless against all claims and actions brought against the Sponsor by reason of any actual or alleged infringement of patent or other proprietary rights in any material, process, machine or appliance used by the School, except when Sponsor supplied, or required School to use that material, process, machine, or appliance, and any claims or actions related to violation of any state or Federal statutes or regulations including those referenced in this Charter. The School shall not indemnify Sponsor for intentional or negligent conduct of Sponsor or any other cause of action caused by or through the fault of the Sponsor.
- H. Applicable to All Coverages the School Procures
 - 1. Other Coverages: The insurance provided by the School shall apply on a primary basis and any other insurance or self-insurance maintained by the Sponsor or its members, officers, employees, or agents, shall be in excess of the insurance provided by or on behalf of/ the School.
 - 2. Deductibles and Retention: Except as otherwise specified, including for wind related coverages, the insurance maintained by the School shall apply on a first-dollar basis without application of deductible or self- insurance retention.
 - 3. Liability and Remedies: Compliance with the insurance requirements of this Charter shall not limit the liability of the School, its subcontractors, its sub-subcontractors, its employees or its agents to the Sponsor or others. Any remedy provided to the

Sponsor or its members, officers, employees, or agents by the insurance shall be in addition to and not in lieu of any other remedy available under the Charter or otherwise.

4. Subcontractors: The School shall require its subcontractors and its sub-subcontractors to maintain any and all insurance required by law.
 5. Defense outside the limits: Whenever possible, coverage for School Leader's Errors and Omission and Sexual Abuse Liability policies should be written with "Defense Costs outside the limits". This term ensures that limits are available to pay claims rather than having attorney's fees erode the available claim dollars.
- I. The Sponsor agrees to indemnify and hold harmless the School, its members, officers, employees and agents, harmless from any and all claims, actions, costs, expenses, damages, and liabilities, including reasonable attorney's fees, arising out of, connected with or resulting from: (a) the negligence, intentional wrongful act, misconduct or culpability of the Sponsor's members, officers, employees or other agents in connection with and arising out of any services within the scope of this Charter; or (b) the Sponsor's material breach of this Charter or law. In addition, the Sponsor shall indemnify, protect and hold the School harmless against all claims and actions brought against the School by reason of any actual or alleged infringement of patent or other proprietary rights in any material, process, machine or appliance used by the Sponsor or required by the Sponsor to be used by the School, and any claims or actions related to violation of any state or Federal statutes or regulations including those referenced in this Charter.
- J. Notwithstanding anything to the contrary contained herein, through such indemnification set forth in Sections 8(H) and 8(J) above, the Sponsor and the School do not waive sovereign immunity to the extent sovereign immunity is available. In the event of any claims described in Sections 8(H) and 8(J) above, the School and Sponsor shall notify one another of any such claim promptly upon receipt of same. The School and Sponsor shall each have the option to defend such claims with their own counsel at their own expense. If the Sponsor or School choose to not hire their own counsel to defend, the other party shall assume the defense of any such claim and have authority in the defense thereof. The parties' obligation to indemnify one another shall survive the termination of this Charter.
- K. Notification of Third-Party Claim, Demand, or Other Action: The School and Sponsor shall notify each other of the existence of any third-party claim, demand or other action giving rise to a claim for indemnification under this provision (a "third-party claim") and shall give each other a reasonable opportunity to defend the same at its own expense and with its own counsel, provided that the Sponsor shall at all times have the right to participate in such defense at its own expense. If, within a reasonable amount of time after receipt of notice of a third-party claim, the School or Sponsor fails to undertake to defend, the other party shall have the right, but not the obligation, to defend and to compromise or settle (exercising reasonable business judgment) the third-party claim for the account. The School or the Sponsor shall make available to each other, at their expense, such information and assistance as each shall request in connection with the defense of a third-party claim.

L. Notice of Claims

1. Time to Submit

The School shall provide the Sponsor with proof of insurance pursuant to Section 8(F) of this Charter.

2. Notice of Cancellation

The evidence of insurance shall provide that the Sponsor be given no less than sixty (60) days written notice prior to cancellation.

3. Renewal or Replacement

Until such time as the insurance is no longer required to be maintained by the School, the School shall provide the Sponsor with evidence of the renewal or replacement of the insurance no less than thirty (30) days before the expiration or termination of the required insurance for which evidence was provided.

Section 9: Governance

- A. Governance of the School will be in accordance with the Bylaws or other organizational documents of the School and as described in the Application. The general direction and management of the affairs of the School shall be vested in the Governing Board with a minimum of 3 members or as otherwise required by law. The membership of the Governing Board shall be in accordance with the Bylaws. A majority of the voting members of the Governing Board shall constitute a quorum or as otherwise provided in the Bylaws. A majority of those members of the Governing Board present shall be necessary to act. Members of the Governing Board may attend in person or by means of communications media technology used. The Governing Board's primary role will be to set policy, provide financial oversight, annually adopt and maintain an operating budget, exercise continuing oversight over the School's operations, and communicate the vision of the School to community members. It shall be the duty of the Governing Board to keep a complete record of all its actions and corporate affairs and supervise all officers and agents of the School and to see that their duties are properly performed.

All members of the Governing Board will be required to attend Governance training and refresher courses as required by law.

The Governing Board will serve as the sole responsible fiscal agent for setting the policies guiding finance and operation. School policies are decided by the Governing Board, and the Principal ensures that those policies are implemented.

- B. The School shall be organized as, or be operated by, an Iowa nonprofit organization. The School will not change its legal status or legal organization without prior written notification to the Sponsor.

- C. The Bylaws or other organizational documents of the School shall establish the procedures by which members of the Governing Board are appointed and removed and the election of officers. The Governing Board will develop and implement policies regarding educational philosophy, program, and financial procedures. The Governing Board will oversee assessment and accountability procedures to assure that the School's student performance standards are met or exceeded.
1. The Governing Board shall exercise continuing oversight over the School's operations and will be held accountable to its students, parents or guardians, and the community at large, through a continuous cycle of planning, evaluation, and reporting as set forth in Iowa Code.
 2. The Governing Board will be responsible for the over-all policy decision making of the School, including the annual approval of the budget.
 3. The Governing Board shall ensure that the School has retained the services of a certified public accountant or auditor for the annual financial audit, pursuant to Iowa Code who shall submit the report to the Governing Board.
 5. The Governing Board shall review and approve the audit report, including any audit findings and recommendations for the financial recovery plan.
 6. The Governing Board shall perform the duties set forth in law, including monitoring any financial corrective action plan or financial recovery plan.
 7. No member of the Governing Board or their immediate family will receive compensation, directly or indirectly from the School or the School's operations. No School or management company employee, or his or her spouse, shall be a member of the Governing Board.
 8. Any change in Governing Board membership must be reported to Sponsor in writing.
- D. The School shall allow reasonable access to its facilities and records to duly authorized representatives of the Sponsor to the extent allowable by law. Conversely, the Sponsor shall allow reasonable access to its records to duly authorized representatives of the School to the extent allowable by law.

To the extent the School is provided access to Sponsor's data systems, all School employees and students will be bound by Sponsor's computer policies and standards regarding data privacy and system security.

- E. If an organization (management organization), including but not limited to: 1) a management company, 2) an educational service provider, or 3) a parent organization, will be managing or providing significant services to the School, the contract for services between the management organization and the Governing Board shall be provided to the Sponsor and attached as an appendix to this Charter. Any contract between the

management organization and the School must ensure that:

1. Members of the Governing Board or their spouses will not be employees of the management organization, nor should they be compensated for their service on the Board or selected to serve on the Board by the management organization.
 2. The Governing Board may hire or retain an independent attorney, accountant, and audit firm representing and working for, or on behalf of, the School. Notwithstanding, the Governing Board and the management organization may contract for such services as determined by the management agreement and as otherwise allowed by law. The Governing Board shall use an audit firm that is independent from the management organization for the purposes of completing the annual financial audit required under law.
 3. The contract will clearly define each party's rights and responsibilities including specific services provided by the management organization and the fees for those services and specifies reasonable and feasible terms under which either party may terminate the contract.
 4. All equipment and furnishings that are purchased by or for the School with public funds shall be the property of the School, not the management organization and any fund balance remaining at the end of each fiscal year will belong to the School, not the management organization.
 5. All loans from the management organization to the School, such as facility loans or loans for cash flow, will be appropriately documented and will be repaid at a rate no higher than market rates at the time of the loan.
 6. A copy of any material changes to the contract between the management organization and the Governing Board shall be submitted to the Sponsor.
 7. The School shall require the educational service provider to perform its duties in compliance with this Charter.
 8. The Governing Board shall ensure that an "arms-length", performance-based relationship exists between the governing board and the management organization
 9. The contract between the management organization and the Governing Board shall allow the Governing Board the ability to terminate the contract.
- F. Any default or breach of the terms of this Charter by the management company shall constitute a default or breach under the terms of this Charter by the School unless the School cures such breach after written notice.

The contract between the ESP and the School shall be submitted to the Sponsor. If the contract between the ESP and the School is amended, a copy of the amended ESP services agreement shall be provided to the Sponsor. If the School and the ESP amend their contract in a manner that results in a material change to this Charter, this Charter may require modification through the contract amendment process. Unless exigent circumstances exist, the School will give the Sponsor reasonable notice of the termination of any ESP contract.

Section 10: Human Resources

- A. The School shall select its own personnel.
- B. The School's employment practices shall be nonsectarian.
- C. The teachers employed by or under contract to the School shall be certified as required by law.
- D. Employees of the School may participate in professional development activities offered by the District. Any costs associated with professional development for which there is an additional fee, and for which no Federal funding has been provided for such purposes to the Sponsor, will be the responsibility of the School or individual School employee.
- E. The School may not employ an individual to provide instructional services or to serve as a teacher's aide if the individual's certification or licensure as an educator is suspended or revoked by this or any other state.
- F. The School may not knowingly employ an individual who has resigned from a school or school district in lieu of disciplinary action with respect to child welfare or safety or who has been dismissed for just cause by any school or school district with respect to child welfare or safety or who is under current suspension from any school or school district.
- G. The School shall disclose to the parents the qualifications of its teachers in the manner required by law. The School shall provide to the Sponsor, prior to the opening of school, the qualifications and assignments of all staff members using the Sponsor's designated database.
- H. The School shall implement policies and procedures for background screening of all prospective employees, volunteers and mentors prior to working or volunteering in the school and prior to their participation in any volunteer activities. All volunteers must be screened and cleared prior to participating in any activities. Any and all visitors or guests to the School while students are on campus must be screened and/or escorted by a staff member who is level 2 screened.
- I. The School shall require all employees and the members of the Governing Board to be fingerprinted by an authorized law enforcement agency or an employee of the School or Sponsor who is trained to take fingerprints, pursuant to law. The cost of fingerprinting shall be borne by the School or the individual being fingerprinted. The results of all such background investigations and fingerprinting will be reported in writing to the Superintendent of

Schools or his or her designee. No School employee or member of the Governing Board may be on campus with students until his or her fingerprints are processed and cleared. The School shall notify the Sponsor's Human Resource Department when a staff member is no longer employed at the School.

The School shall require all employees and Governing Board members to self-report within 48 hours to appropriate authorities any arrest and final disposition of such arrest other than minor traffic violations. The School shall then take appropriate action relating to the employment of that individual.

Section 11: Miscellaneous Provisions

A. Impossibility

Neither party shall be in default of this Charter, if the performance of any or all of this Charter is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any strike, flood, hurricane, riot, fire, explosion, war, act of God, sabotage or any other casualty or cause beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

B. Drug Free Workplace: The School shall be a drug-free workplace, as provided by State and Federal law.

C. Entire Agreement

This Charter shall constitute the full, entire, and complete agreement between the parties hereto. All prior representations, understandings and agreements whether written or oral are superseded and replaced by this Charter. This Charter may be altered, changed, added to, deleted from or modified only through the voluntary, mutual written consent of the parties. Any amendment to this Charter shall require approval of the Sponsor and the Governing Board.

D. No Assignment without Consent

This Charter shall not be assigned by either party without mutual written consent.

E. No Waiver

No waiver of any provision of this Charter shall be deemed or shall constitute a waiver of any other provision unless expressly stated. The failure of either party to insist in any one or more instances upon the strict performance of any one or more of the provisions of this Charter shall not be construed as a waiver or relinquishment of said term or provision, and the same shall continue in full force and effect. No waiver or relinquishment to any provision of this Charter shall be deemed to have been made by either party unless in writing and signed by the parties.

F. Default Including Opportunity to Cure

In the event that the School should default under any provision hereto, absent any circumstance permitting immediate termination, the School shall have thirty (30) days from written notice of default to cure, unless otherwise agreed to by the parties in writing.

G. Survival Including Post Termination of Charter: All representations and warranties made herein shall survive termination of this Charter.

H. Severability: If any provision or any part of this Charter is determined to be unlawful, void, or invalid, that determination shall not affect any other provision or any part of any other provision of this Charter and all such provisions shall remain in full force and effect.

I. Third Party Beneficiary: This Charter is not intended to create any rights in a third party beneficiary.

J. Choice of Laws, Jurisdiction and Venue of Disputes and Waiver of Jury Trial

This Charter is made and entered into in the County and shall be interpreted according to the laws of the State. The exclusive jurisdiction and venue for any litigation between the parties arising out of or related to this Charter, shall be the Circuit Court, the County Court in and for the County, or the appropriate appellate or federal court. The parties forever waive the right to trial by jury for any and all litigation between the parties arising out of or related to this Charter. The parties agree to have any such dispute settled by a judge alone, without a jury.

K. Notice

Official correspondence between the School and the District shall be in writing, and signed by an officer of the Governing Board or the Principal of the School. Every notice, approval, consent or other communication authorized or required by this Charter shall not be effective unless same shall be in writing and sent postage prepaid by United States mail, directed to the other party at its address hereinafter provided or such other address as either party may designate by notice from time to time in accordance herewith:

1. Notices to the School:
2. Notices to the Sponsor:

Notice may also be given by email to the email addresses provided by the parties subject to verbal or written confirmation of receipt.

Each of the persons executing this Charter represents and warrants that he or she has the

full power and authority to execute the Charter on behalf of the party for whom he or she signs and that he or she enters into this Charter of his or her own free will and accord and in accordance with his or her own judgment, and after consulting with anyone of his or her own choosing, including but not limited to his or her attorney.

L. Conflict Between Charter and Iowa Law

In any case where this charter conflicts with Iowa law, the terms of the applicable Iowa Statute, State Board Rule, or case law will control over the Charter.

M. Conflict or Dispute Resolution

Subject to the applicable provisions of law, all disagreements and disputes relating to or arising out of this Charter which the parties are unable to resolve informally, may be resolved according to the following dispute resolution process, unless otherwise directed or provided for in the aforementioned statute. It is anticipated that a continuing policy of open communication between the Sponsor and the School will prevent the need for implementing a conflict or dispute resolution procedure.

The following dispute resolution process, not otherwise pre-empted by law, shall be equally applicable to both parties to this Charter in the event of a dispute. All disagreements and disputes relating to or arising out of this Charter which the parties are unable to resolve informally, may be resolved according to the following dispute resolution process:

Step 1 -- The persons having responsibility for implementing this Charter for the aggrieved party will write to the other party to identify the problem, propose action to correct the problem and explain reasons for the proposed action.

Step 2 -- The person having responsibility for implementing this Charter for the other party will respond in writing within fifteen (15) calendar days, accepting the proposed action or offering alternative solution(s) to the problem. A meeting of representatives of the parties may be held to reach agreement on the solution and subsequent action.

Step 3 -- Upon resolution of the problem, the responsible personnel from both parties will develop a joint written explanation indicating the resolution. This document will be retained with this Charter. If an amendment to the Charter is necessary, the amendment will be submitted for action by both parties.

Step 4 -- If efforts at agreement within a reasonable time are unsuccessful, the parties may have recourse to their available legal remedies, including, without limitation, mediation through the FDOE or those additional remedies set forth in Iowa Code.

N. Citations

Whenever a Statute or State Board of Education Rule is referenced in this Charter, it shall be construed to mean the statute or rule as it is amended from time to time.

The Sponsor's policies will not control this Charter or be incorporated herein absent written consent of the Governing Board, as provided by Iowa law, unless the School agreed to such policies in the approved Application or otherwise agreed to by the Governing Board in writing.

If the Sponsor subsequently amends any agreed-upon Sponsor policy the version of the policy in effect at the time of the execution of the charter, or any subsequent modification thereof, shall remain in effect and the Sponsor may not hold the School responsible for any provision of a newly revised policy unless the revised policy is mutually agreed upon.

O. Interpretation

The headings in the Charter are for convenience and reference only and in no way define, limit or describe the scope of the Charter and shall not be considered in the interpretation of the Charter or any provision hereof. This Charter is the product of negotiation between the parties and therefore the terms of this Charter shall not be construed against either party as the drafter.

P. Counterparts. This Charter may be executed in as many counterparts as may be required, each of which when so executed shall be deemed to be an original, but all of which when taken together shall constitute a single instrument. An electronic or facsimile copy of this Charter and any signatures thereon shall be considered for all purposes as an original.

Q. Confidential Information. All education records, personally identifiable information (“**PII**”), data, metadata, personnel records, safety and security information, and other confidential information (collectively referred to herein as “**Confidential Information**”) of one Party (the “**Disclosing Party**”) that comes within the other Party's possession (the “**Receiving Party**”) in the course of performing hereunder shall be held in confidence by the Receiving Party in strict compliance with all confidentiality and disclosure provisions of all applicable federal, state, and local laws, rules, and regulations, including, without limitation, the Family Educational Rights and Privacy Act and its implementing rules and regulations (collectively “**FERPA**”), the Children's Online Privacy Protection Act and its implementing rules and regulations, and all other relevant rules promulgated by the State Board of Education (collectively referred to herein as “**Privacy Laws**”), as any of the foregoing may be amended from time to time. The Parties each expressly acknowledge and understand that Confidential Information may only be used by the Receiving Party in connection with performing their respective duties and obligations under this Charter and for the limited purposes for which the information was disclosed by the Disclosing Party.

IN WITNESS WHEREOF, the parties hereto have executed this Charter, effective as of the day and year first above written:

By:

Date

ATTESTED:

By:

Date

By:

ATTESTED:

By:

Date

APPROVED AS TO FORM:

By:

Date